



INDIGENOUS TOURISM

# LABOUR MARKET RESEARCH

Literature Review 2020



Canada



Funding provided through the Canada-British Columbia  
Labour Market Development Agreement.

## About the Indigenous Tourism British Columbia (ITBC)

ITBC is a non-profit, stakeholder-based organization that is committed to growing and promoting a sustainable, culturally rich Indigenous tourism industry that envisions a sustainable Indigenous tourism sector with diverse products in every region of the province. Through training, information resources, networking opportunities and co-operative marketing programs, ITBC is a one-stop resource for Indigenous entrepreneurs and communities in British Columbia who are operating or looking to start a tourism business. ITBC works closely with tourism, business, education, and government organizations to help BC's Indigenous tourism businesses offer quality experiences and actively promotes these experiences to visitors and residents.

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O'Neil Marketing & Consulting collaborates with other leaders in Indigenous and tourism research and economic forecasts. For over 25 years, Beverley O'Neil (Klawum' Patki) of the Ktunaxa Nation has tailoring project teams to the client. O'Neil and team members have worked on projects that defined Indigenous tourism in British Columbia, Canada, and has guided Indigenous people and Nations worldwide in designing tourism experiences that reflect their story. This project team includes Brian Payer, Krista Morten, Dr. Peter Williams, and Roslyn Kunin with Lee Gan. This Literature Review was led and written by Krista Morten (Align Consulting Group). More info: [www.designingnations.com](http://www.designingnations.com)

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The views and opinions expressed in this report are those of its author(s) and not the official policy or position of the Government of British Columbia.



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# INDIGENOUS TOURISM LABOUR MARKET RESEARCH Literature Review

## 1 EXECUTIVE SUMMARY

Tourism is one of the largest and fastest-growing economic sectors in the world, Canada and British Columbia. 2019 was no exception marking the sixth consecutive year of increased travel to Canada and the third consecutive record-breaking year with 22.1 million travellers to Canada. Indigenous tourism is an important fast-growing sector of the tourism industry in BC.

The BC tourism industry faces many challenges over the next decade. The rapid industry growth, a declining youth population, and the largest number of people in history about to retire and leave the workforce all lead to projected labour market shortages. Indigenous tourism is not immune to these challenges. In order to strengthen the sector and ensure that Indigenous peoples and tourism businesses are well placed to meet the demand for Indigenous cultural experiences, Indigenous Tourism BC (ITBC) with its industry partners is conducting labour market research to inform and understand the specific needs and challenges of Indigenous tourism sector.

The research will be used to develop a strategic approach to address labour market challenges in one of the province's highest-potential sectors. ITBC and the BC Ministry of Advanced Education and Skills Training, collaborated to fund implementation of Phase 2 and 3 of development of an Indigenous Tourism Labour Market Strategy.

ITBC began labour market work in 2018 (Phase 1). Phase 1 mobilized sector partners and identified research needs and made recommendations for moving forward. One recommendation was to conduct more comprehensive Indigenous tourism labour market research (or Phase 2) in order to develop an insight-based Indigenous Tourism BC Labour Market Strategy.

The intent of Phase 2 is based on the recommendations from Phase 1 to conduct thorough research related to the BC Indigenous tourism labour market. Work in Phase 3 will develop the strategy to retain and increase Indigenous employment in the tourism industry, and Phase 4 is to implement that strategy.

Phase 2 includes comprehensive research including this literature review as well as primary data collection and final report development which will include high level recommendations for Phase 3. The objectives of Phase 2 are to:

- 1) Define the Indigenous tourism labour market,
- 2) Determine the impact of Indigenous tourism labour to the BC tourism industry and labour market, and
- 3) Identify training and skills development needs.

## Key Findings

The Conference Board of Canada<sup>1</sup> predicts that due to its aging population and low fertility rate, Canada needs new sources of talent to enter the labour force to maintain its high living standards. Between 2018 and 2040, 11.8 million people will leave Canadian schools and become workers, far short of the 13.4 million workers exiting the labour force. Along with immigration, the Indigenous labour market is viewed as a partial solution to the future labour shortages.

The BC tourism industry faces many challenges over the next decade. The rapid industry growth, a declining youth population, and the largest number of people in history about to retire and leave the workforce. These all lead to projected labour market shortages. Many tourism and hospitality businesses in BC have expressed considerable concern about the impacts of labour shortages on their businesses. Over the past decade, the demand for workers in the BC tourism industry started to exceed supply significantly. The demand-supply gap is projected to increase well into the future as development and expansion of world-class product offerings and sustained, focused marketing efforts are projected to stimulate annual revenue growth levels.

In 2019, the tourism and hospitality sector employed around 310,000 people in BC, about 12% of the provincial workforce. From 2019 to 2029 the sector is expected to grow by 108,025 job openings, of which 54% are to replace exiting workers. This provincial growth is at a faster-than-average pace. Regional analysis demonstrates that more than half of growth will be strongest in rural areas of the province including the Northeast, in the Thompson Okanagan and Vancouver Island.

Indigenous tourism is not immune to these challenges. In fact, the Indigenous tourism sector is growing at a rapid rate and is outpacing the overall tourism sector growth both in BC and throughout Canada.

In Canada and BC, to grow a sustainable tourism industry, there is also new focus on geographic and temporal dispersion of visitors. This means that moving forward there will be a focus on increasing visitation and tourism revenues in more areas in BC across more seasons. For emerging destinations, particularly in rural communities, this improves the economic diversification and resilience of communities. These actions will drive demand for top-quality cultural tourism experiences at Indigenous tourism businesses, as well as demand for labour at non-Indigenous tourism experiences.

Also, the federal and provincial tourism strategies have identified Indigenous tourism as a key growth sectors of the tourism economy in Canada and BC. Further, the federal and provincial tourism ministries have allocated funding to accelerate development of the Indigenous tourism sectors. An opportunity exists to leverage additional funds and/or initiatives to advance the BC Indigenous tourism labour situation. Specifically, the federal government has identified increased funding for Indigenous culinary experiences.

All these factors lead to the continued opportunity to grow both the number of Indigenous cultural tourism businesses as well as grow the size of the Indigenous tourism workforce that are employed at both Indigenous cultural tourism businesses and at non-Indigenous tourism businesses.

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<sup>1</sup> Conference Board of Canada. 2019. Can't Go it Alone. Immigration Is Key to Canada's Growth Strategy. <https://www.conferenceboard.ca/e-library/abstract.aspx?did=10150>

## Indigenous Workforce

The current and future Indigenous workforce has the characteristics to meet the needs of the growing demand for tourism jobs. This is supported by:

- Over the past decade the population of Indigenous people in BC has grown faster than the non-Indigenous population. In BC, in 2016 there were 270,580 Indigenous people, representing 16% of Canadian Indigenous people and almost 6% of British Columbia's population. This was up 16% from 2011 and 38% from 2006.
- Thus, the Indigenous population is younger and tend to be early mothers and lone parents compared to the non-Indigenous population. Indigenous people already employed in the tourism workforce to be female and younger (<35 years old) compared to the non-Indigenous tourism workforce.
- Indigenous people are more likely to live in rural BC than non-Indigenous people. In fact, about a third of Indigenous people live in the mainland / southwest region compared to 63% of non-Indigenous people. As mentioned earlier, regional analysis of the growing demand for tourism jobs demonstrates that more than half of growth will be strongest in rural areas of the province including the Northeast, in the Thompson Okanagan and Vancouver Island.
- There is growth in the employment participation rate and the employment rate of Indigenous British Columbians. In fact, between 2014 and 2019 the growth was higher for Indigenous British Columbians compared to non-Indigenous British Columbians.
- The share of Indigenous people working in the tourism industry (5%) is growing and is larger than the share of Indigenous people working the overall BC (4%).
- Currently, a larger share of Indigenous British Columbians work in accommodations (6%) and food and beverage services (6%), 5% work in recreation and entertainment, while fewer work in transportation (4%) and in travel services (2%). Future tourism labour demand is projected to be larger in the accommodations and food and beverage services, creating a natural fit for Indigenous people.

There are well documented barriers to employment for Indigenous peoples. Overcoming these barriers will enable higher employment in the tourism sector in British Columbia. These include: the perception of shortage of jobs available, racism, discrimination and social exclusion, recruitment difficulties, literacy, skills education, technical, job-related skills, professional qualifications, work experience, cultural differences (including language), self-esteem, poverty and poor housing, lack of driver's license, lack of transportation, childcare, lack of career planning and knowledge of where to work for a job, family structure, living in rural / remote areas and business labour policy.

The current and future Indigenous tourism workforce could benefit from:

- Culturally accessible and safe education and skills training
- Access to programs that help identify preferred career choices (career guidance) - this includes high school-based career counselling and professional development programs
- Access to secure and relevant employment services, especially in urban areas
- Access to culturally sensitive workplaces
- Access to work experience programs (especially for young Indigenous people), training and job advancement opportunities
- Access to mentoring and Indigenous role models
- Access to childcare programs and transportation to employment sites
- Access to more contacts / networking, resume writing skills or job finding clubs

The Indigenous workforce has the perception there is a lack of jobs which is contradictory to the current and future labour shortages in the tourism industry. In fact, a 2017 study found that 16% of Indigenous people said they wanted to work in tourism but could not find a job, double the overall average. There is an opportunity to ensure knowledge about the demand for tourism jobs is known by Indigenous communities, the workforce and post-secondary training institutions.

### Tourism Businesses

Past research has demonstrated that there is also a lack of Canadian business awareness of Indigenous employment programs. Tourism businesses could benefit from communication about the services that the 20+ Indigenous Skills, Employment and Training offices (ISETs) offer.

Indigenous and non-Indigenous tourism businesses could benefit from employer best practices that increase Indigenous retention, engagement and workplace development, such as:

- Developing business recognition of the economic potential in commitments to Indigenous groups
- Participation in training a pool of qualified Indigenous workers
- Providing mentorship and career bridging programs
- Develop Indigenous-friendly workplace programs and or policies
- Participating in training a pool of qualified Indigenous workers
- Providing mentorship and career bridging programs
- Develop Indigenous-friendly workplace programs and / or policies
- Deliver community-based and engaging programming for diverse learning styles
- Engage in stronger collaboration and coordination among stakeholders with a focus on long-term partnerships
- Benefit from guidance in human resource management, and establish and implement policies for recruiting, integrating and retaining Indigenous workers
- Offer competitive compensation and benefits
- Provide time for Indigenous workers to participate in seasonal or traditional activities

### Non-Indigenous Tourism Businesses

There is the potential for better engagement of Canadian businesses with Indigenous communities to grow the Indigenous tourism workforce. National research suggests that businesses have low awareness of opportunities to partner with Indigenous communities, they lack strategy for how to do so, they do very little consultation with Indigenous communications and do not prioritize actions to engage with Indigenous communities. There is evidence that:

- Businesses with full partnerships, geared towards both business and community goals, reported they are hiring more Indigenous people, doing more business in their communities, and seeing their reputations grow.
- The Canadian hospitality sector 'sees' the labour solution of working with Indigenous groups yet has not acted and do not understand how to act. The retail sector is reactive and is most motivated in working with Indigenous groups and people.

## 2 KEY TERMS

In the development and implementation of any working relationship and strategy with Indigenous people it is important to understand the terminology used – terms have different meaning.

- **Indigenous** is an all-encompassing term referring to all people of Indigenous ancestry – First Nation, Inuit and Métis peoples. Indigenous is a more-recent term; prior to this the common phrases used were Aboriginal, Native, First Nation and Indian.
- Indian is also a legal term defined by the Government of Canada in the *Indian Act*.
- Only people of Indigenous ancestry that satisfy the *Indian Act* definition are 'legally' entitled by Canada to be registered as Indians. Continued court challenges to this definition have enabled more Indigenous people to be registered and recognized; in recent years Métis people been able to apply for registration.
- Not all people of Indigenous or Métis ancestry are registered Indians. Registered Indians are also called status Indians, while non-registered are non-status Indians.
- Up until 1983 when the federal Bill C-31 was passed, when a non-Indigenous woman married a status Indian man, she became a registered Indian despite not being of Indigenous ancestry. Consequently, their children were registered as 'fully' status Indians with full ability to pass status to their children. Marriage to a status Indian no longer entitles the non-Indigenous spouse to become a registered / status Indian. Also prior to 1983, when a status Indian woman married a non-Indian man she was removed from the Indian Registry and was no-longer entitled to any benefits associated with being a registered Indian, thus she became disenfranchised; any children she had after being disenfranchised were unable to register as Indians. After Bill-C31, any Indian disenfranchised were able to apply to be re-enlisted, so did their children; however, with limitations to passing status to their own children.
- **Status Indians** are also entitled to be members of their ancestral Indigenous communities, commonly called Bands.
- **Bands** are the Indigenous villages of Indigenous Nations, while **Tribal Councils** are political entities that administer programs for their members who are typically Bands of the same Indigenous ancestry. Legally, a Tribal Council is not a nation, though at times it is empowered to speak on behalf of its Bands as a collective nation.
- **Reserves** are lands assigned to a Band by the federal government. A Band may have more than one reserve; these reserves are typically of varying sizes. In Yukon, NWT and Nunavut, there are no reserves, instead their villages are called settlements.
- Indigenous Nations have traditional territories. In British Columbia, nearly all First Nations are non-treaty. In the early 1990s, roughly 140 of the 203 Bands entered the BC-made modern-day treaty making process ([www.bctreaty.ca](http://www.bctreaty.ca)). To date, there are eight constitutionally entrenched modern treaties in the province when the Nisga'a<sup>2</sup> treaty is included. First Nations still recognize their entire traditional territory, and their inherent *Aboriginal Rights and Title* (AR&T) to govern all their traditional lands is more frequently being determined and recognized in the courts.

<sup>2</sup> Nisga'a initiated treaty negotiations in the early 70s under the former treaty negotiation process.

- A status Indian may or may not reside in their reserve community or another reserve; those who do live on-reserve are less mobile than other Canadians. Status Indians who live outside their reserve are more mobile, they are also more likely to move more frequently than other Canadians.



### 3 CONTEXT

Tourism is one of the largest and fastest-growing economic sectors in the world, Canada and British Columbia. 2019 was no exception marking the sixth consecutive year of increased travel to Canada and the third consecutive record-breaking year with 22.1 million travellers to Canada.<sup>3</sup>

British Columbia has also experienced exceptional growth in the tourism sector over the past decade. BC's tourism industry generated revenue of \$18.4 billion in 2017, an increase of +8% from 2016. Since 2007, total tourism revenue has grown +41%. Currently, in BC, there are 19,243 tourism-related businesses and the tourism and hospitality sector employs 310,550 people, about 12% of the provincial workforce.<sup>4</sup>

Indigenous tourism is an important fast-growing sector of the tourism industry in BC. In 2016, there were an estimated 401 Indigenous tourism related businesses operating generating \$705 million in direct gross domestic output and creating 7,400 direct full-time jobs for Indigenous and non-Indigenous residents in BC through their activities.<sup>5</sup> Indigenous Tourism British Columbia's (ITBC) 2017-2022 Corporate Plan anticipates that the Indigenous tourism sector will continue to grow. In fact, if goals are met, Indigenous cultural tourism could welcome 2.2 million visitors per year and help generate \$1.5 billion in spending on trips that include an Indigenous experience.<sup>6</sup>

The BC tourism industry faces many challenges over the next decade. The rapid industry growth, a declining youth population, and the largest number of people in history about to retire and leave the workforce all lead to projected labour market shortages. In fact, between 2019 to 2029 the sector is expected to grow by 108,025 job openings, of which 54% are to replace exiting workers. This growth in tourism jobs is at a faster-than-average pace.

Indigenous tourism is not immune to these challenges. In order to strengthen the sector and ensure that Indigenous peoples and tourism businesses are well placed to meet the demand for Indigenous cultural experiences, ITBC with its industry partners is conducting labour market research to inform and understand the specific needs and challenges of Indigenous tourism sector. The research will be used to develop a strategic approach to address labour market challenges in one of the province's highest-potential sectors.

<sup>3</sup> Destination Canada. 2020. 2019: Another Record-Breaking Year for Canada [https://www.destinationcanada.com/sites/default/files/archive/987-Year%20in%20Review%20Infographic%20-%202019/2019-yearend\\_EN.pdf](https://www.destinationcanada.com/sites/default/files/archive/987-Year%20in%20Review%20Infographic%20-%202019/2019-yearend_EN.pdf)

<sup>4</sup> Destination British Columbia. 2019. Value of Tourism Trends from 2007-2017. [https://www.destinationbc.ca/content/uploads/2019/10/2017-Value-of-Tourism\\_FINAL.pdf](https://www.destinationbc.ca/content/uploads/2019/10/2017-Value-of-Tourism_FINAL.pdf)

<sup>5</sup> Indigenous Tourism BC. 2018. 2018/2019 Indigenous Tourism BC Action Plan [https://www.Indigenoustourismbc.com/assets/corporate/ITBC\\_2018\\_2019\\_Action\\_Plan.pdf](https://www.Indigenoustourismbc.com/assets/corporate/ITBC_2018_2019_Action_Plan.pdf).

<sup>6</sup> Indigenous Tourism BC. 2018. 2016. ITBC Corporate Plan 2017-2022 [https://www.Indigenoustourismbc.com/assets/corporate/AtBC\\_CorporatePlan2017-2022.pdf](https://www.Indigenoustourismbc.com/assets/corporate/AtBC_CorporatePlan2017-2022.pdf)

### 3.1 Project Background

ITBC began labour market work in 2018 (Phase 1). Phase 1 mobilized sector partners and identified research needs and making recommendations for moving forward. One recommendation was to conduct more comprehensive Indigenous tourism labour market research in order to develop an insight-based Indigenous Tourism BC Labour Market Strategy.

Recognizing this continued value of tourism to Indigenous peoples and communities, ITBC and the BC Ministry of Advanced Education and Skills Training, collaborated to fund implementation of Phase 2 and 3 of development of an Indigenous Tourism Labour Market Strategy.

The intent of Phase 2 is to build on the learning and recommendations from Phase 1 and to conduct thorough research related to the BC Indigenous tourism labour market. Work in Phase 3 will develop the strategy to retain and increase Indigenous employment in the tourism industry, and Phase 4 is to implement that strategy.

Phase 2 includes comprehensive research including the literature review as well as primary data collection and final report development which will include high level recommendations for Phase 3. The objectives of Phase 2 are to:

- Define the Indigenous tourism labour market,
- Determine the impact of Indigenous tourism labour to the BC tourism industry and labour market, and
- Identify training and skills development needs.

From a methodological perspective, this literature review collects information from statistical data about Indigenous people, the tourism industry, the BC tourism labour market and the BC Indigenous tourism labour market, as well as various strategies, reports and publications by organizations working in tourism and labour market initiatives. To do so, data and publications were collected from various organizations, industry experts as well as the project steering committee. Also, online searches were conducted to ensure relevant international, Canadian and other academic research was incorporated. Sources and weblinks are provided as footnotes and a full list of publications collected is available in **Appendix A**.

**Phase 1: Initial Review of BC Indigenous Tourism Labour Market (2018)**



**Phase 2: Comprehensive Background Labour Market Research (2020)**

- Literature Review
- Primary Data Collection (focus groups, community forums, industry forum, business survey)
- Report with Strategy Recommendations



**Phase 3: BC Indigenous Tourism Labour Market Strategy Development (2020-2021)**



**Phase 4: Strategy Implementation (2021 onward)**

### 3.2 Indigenous Peoples Profile

#### Demographics

According to Statistics Canada, in 2016 there were 1,673,785 Indigenous people in Canada who accounted for 5% of the population. This was up from 4% of the population in 2006. Since 2006, the population has grown by 43%, more than four times the growth rate of non-Indigenous people over the same period.

In British Columbia there are 270,580 Indigenous people, representing 16% of Canadian Indigenous people and almost 6% of British Columbia's population.<sup>7,8</sup> This was up 16% from 2011 and 38% from 2006. Statistics Canada reports two main factors have contributed to the growing Indigenous population: the first is natural growth, which includes increased life expectancy and relatively high fertility rates; the second factor relates to changes in self-reported identification. Put simply, more people are newly identifying as Indigenous on the census – a continuation of a trend over time.<sup>9</sup>

Regionally, the Lower Mainland/ southwest economic development region comprises 34% of the British Columbia Indigenous population compared to a much larger 63% of the non-Indigenous population. This is followed by the Vancouver Island/Coast (22%), the Thompson Okanagan (17%), the North Coast & Nechako (11%), the Cariboo (9%) and the Kootenay (4%) and Northeast (4%) regions of the province. Overall, it is estimated that 30% of Indigenous peoples in BC live in rural areas, a higher proportion than the overall population (Figure 1).<sup>10</sup>

Throughout Canada, there has been an increase in the urban population of Indigenous peoples for several decades. This change has often been misunderstood simply as the movement by First Nations people away from reserves and into cities. In fact, the Indigenous population continues to grow both on and off reserve. According to Statistics Canada, the urbanization of Indigenous peoples in Canada is due to multiple factors – including demographic growth, mobility and changing patterns of self-reported identity.<sup>11</sup>

In 2016, 52% of BC's Indigenous population are female (male - 48%); like the proportion of non-Indigenous females (51%).

The Indigenous population in BC is young and growing, with 35% of Indigenous people in 2016 under the age of 15, and 22% aged between 15 and 34 years, compared to 17% and 14% respectively for the non-Indigenous population. The average age of Indigenous people in BC is 32.8 years old, roughly a decade younger than the non-Indigenous population (42.4 years, Figure 2).

<sup>7</sup> 'Aboriginal identity' includes persons who are First Nations (North American Indian) Métis or Inuk (Inuit) and / or those who are Registered or Treaty Indians (that is registered under the Indian Act of Canada) and / or those who have membership in a First Nation or Indian band. Aboriginal peoples of Canada are defined in the Constitution Act 1982 section 35 (2) as including the Indian Inuit and Métis peoples of Canada. ITBC prefers the term Indigenous so the term 'Indigenous Identity' is used here instead of 'Aboriginal Identity'.

<sup>8</sup> Statistics Canada. 2018. British Columbia Aboriginal Population Profile. 2016 Census. Statistics Canada Catalogue no. 98-510-X2016001. Ottawa. Released July 18, 2018. <http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/abpopprof/index.cfm?Lang=E> (accessed February 8, 2020).

<sup>9</sup> Statistics Canada. 2017. Aboriginal peoples in Canada: Key Results from the 2016 Census. <https://www150.statcan.gc.ca/n1/daily-quotidien/171025/dq171025a-eng.htm>

<sup>10</sup> BC Stats. 2017. Infoline 2017. Issue 17-138: 2016 Census: Highlights from the Indigenous People in Canada Release. <https://www2.gov.bc.ca/gov/content/data/statistics/infoline/infoline-2017/17-138-2016-census-Indigenous-people-canada>

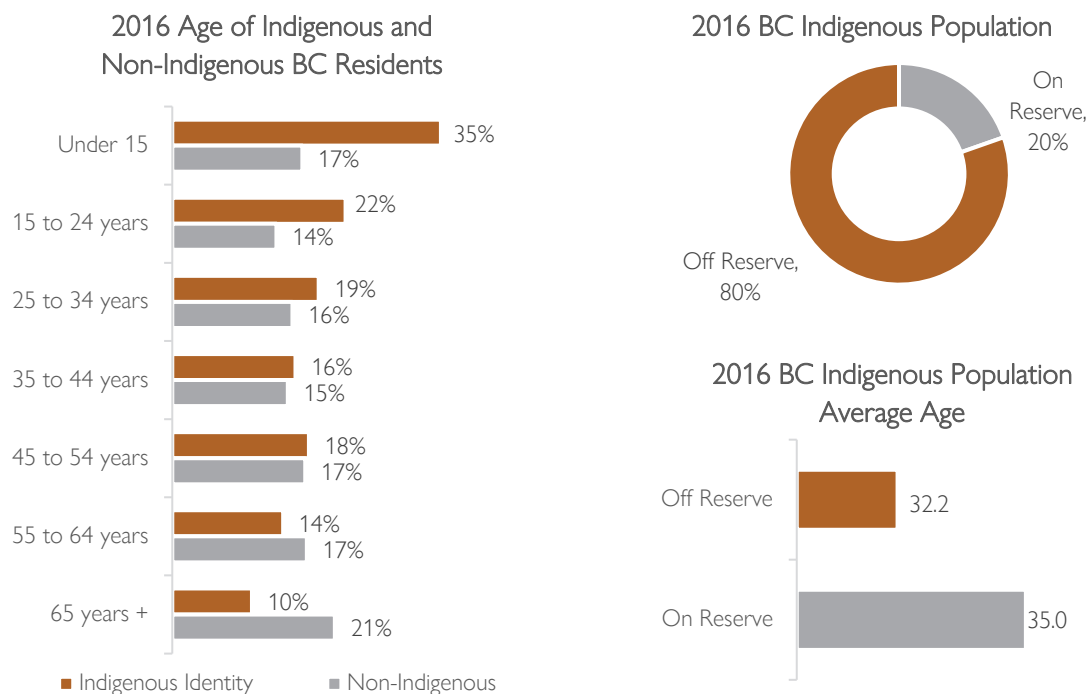
<sup>11</sup> Statistics Canada. 2017. Aboriginal peoples in Canada: Key results from the 2016 Census. <https://www150.statcan.gc.ca/n1/daily-quotidien/171025/dq171025a-eng.htm>

Figure 1: BC Indigenous and Non-Indigenous Populations 2016

Economic Development Region	Indigenous Population		Non-Indigenous Population	
	Indigenous Population	Indigenous % of Total	Non-Indigenous Population	Non-Indigenous % of Total
Mainland / Southwest	90,735	34%	2,695,215	63%
Vancouver Island / Coast	60,850	22%	718,750	17%
Thompson-Okanagan	45,060	17%	487,625	11%
Kootenay	10,070	4%	138,175	3%
Cariboo	23,865	9%	130,075	3%
North Coast & Nechako	29,105	11%	63,920	1%
Northeast	10,905	4%	55,920	1%
<b>Total</b>	<b>270,590</b>	<b>6%</b>	<b>4,289,680</b>	<b>94%</b>

Source: Statistics Canada. 2018. Aboriginal Population Profile. 2016 Census.

About 20% of the Indigenous population live on-reserve, while the remainder live off reserve. The average age of off-reserve Indigenous people is younger (32 years) than those living on-reserve (35 years).

Figure 2: BC Indigenous Population 2016 – Age and Residency<sup>12</sup>

<sup>12</sup> Statistics Canada. 2018. Aboriginal Population Profile. 2016 Census.

## Motherhood and Fertility

In Canada, the fertility rate and prevalence of early motherhood (i.e., becoming a mother before the age of 20) is higher in the Indigenous population compared to the non-Indigenous population. The fertility rate of Indigenous women is higher than non-Indigenous women. In 2011, the total fertility rate of Indigenous women was 2.2 children per woman, compared with 1.6 children per woman for the non-Indigenous population. Registered Indian fertility rate is highest amongst Status Indians at 2.7 children per woman.<sup>13</sup>

The 2012 Aboriginal Peoples Survey (APS) examined the First Nation, Métis and Inuit women population aged 20 to 44 against data from the Statistics Canada 2011 General Social Survey (GSS) for non-Indigenous women. 28% of First Nations women living off-reserve, 20% of Métis women, and 45% of Inuit women became mothers before the age of 20. “This compared with 6% of non-Indigenous women in the same age group.” Of Indigenous women living off-reserve, younger women (age 20 to 24 years) were less likely (18%) to be early mothers than women aged 40 to 44 years (30%).<sup>14</sup>

“Aboriginal women who were early mothers were less likely to have a high school diploma.” High school completion is key to employment. Both early mothers and other mothers without a high school diploma were less likely to be employed (around 40%) than early mothers with at least a high school diploma. The probability of an Indigenous mother with a diploma being employed was 59%. Childless off-reserve Indigenous women with a diploma had a high probability of being employed (80%).

Indigenous women (17%) are also twice as likely to be lone parents than non-Indigenous women (8%). Add that the share of Indigenous women lone parents is highest on-reserve (22%) compared to those living off-reserve (18%).

## 3.3 Tourism Industry

### 3.3.1 Value of Tourism

Tourism is one of the largest and fastest-growing economic sectors in the world.<sup>15</sup> Global international tourist arrivals (overnight visitors) reached 1.5 billion in 2019. 2019 was a year of growth (4%), although slower compared to the exceptional rates of 2017 (6%) and 2018 (6%).<sup>16</sup> By 2030, it is expected global international tourist arrivals will be 1.8 billion.<sup>17</sup>

<sup>13</sup> Statistics Canada. 2016. First Nations, Métis and Inuit Women. <https://www150.statcan.gc.ca/n1/pub/89-503-x/2015001/article/14313-eng.htm>

<sup>14</sup> Statistics Canada. Early motherhood among off-reserve First Nations, Métis and Inuit women. <https://www150.statcan.gc.ca/n1/pub/75-006-x/2017001/article/54877-eng.htm>

<sup>15</sup> UNWTO. 2019. Why Tourism? <https://www.unwto.org/why-tourism>

<sup>16</sup> UNWTO. 2020. World Tourism Barometer and Statistical Annex. <https://www.eunwto.org/doi/pdf/10.18111/wtobarometereng.2020.18.1.1>

<sup>17</sup> UNWTO. 2011. Tourism Towards 2030 Global Overview. <https://www.unwto.org/archive/global/press-release/2011-10-11/international-tourists-hit-18-billion-2030>

## Canada

In Canada, tourism plays a significant role in the national economy. In 2019, the tourism economy generates an estimated \$104.9 billion in tourism expenditure, supports approximately 1 in 10 jobs in communities across Canada and contributes an estimated \$43.5 billion in Gross Domestic Product.<sup>18</sup>

2019 marked the third consecutive record-breaking year with 22.1 million travellers to Canada. Overall, the US market had another record-breaking year with 14.99 million total arrivals. Overnight arrivals to Canada from countries other than the United States reached an all-time high of 7.15 million. Compared to American visitors, overseas tourists typically stay in Canada longer and spend more. Growth in overseas visitors helps to achieve Destination Canada's high-yield strategy.<sup>19</sup>

## British Columbia

Tourism is rapidly growing and is a driving force of the BC economy. Destination BC's Value of Tourism 2017 publication highlights tourism's contribution to the economy over time.<sup>20</sup>

- British Columbia's tourism industry generated revenue of \$18.4 billion in 2017, an increase of +8% from 2016. Since 2007, total tourism revenue has grown +41%. In fact, tourism revenue has grown every year between 2007 and 2017, except for the economic downturn in 2009.
- Accommodation and food services generated over one-third (36%) of total tourism revenue in 2017. Transportation services accounted for nearly a third (32%) and retail services accounted for more than a quarter (26%) of total tourism revenue in 2017. Other tourism-related services (including vehicle rentals, tourism-related recreation and entertainment, and vacation homes) accounted for 6.1% of total revenue.
- Tourism-related provincial tax revenue was \$1,204 million in 2017, up 6% over 2016, and an increase of 40% since 2007.
- Tourism exports generated revenue of \$5.5 billion, an increase of 9% over 2016 and 84% over 2013.
- The tourism industry contributed \$9 billion of value added to the BC economy, as measured through GDP (in 2012 constant dollars). This represents 7% growth over 2016 and 33% growth since 2007. Tourism is growing faster than the overall economy as GDP for the provincial economy grew 4% in 2017 over 2016.
- In 2017, tourism (\$9.0 billion) contributed more to GDP than any other primary resource industry. In comparison, mining contributed \$4.9 billion to the total provincial GDP, oil and gas extraction contributed \$3.7 billion, forestry and logging contributed \$1.8 billion, and agriculture and fish contributed \$1.5 billion.
- In 2017,<sup>21</sup> there were 19,243 tourism-related establishments operating in BC which represents 0.4% growth over 2016 and 3% over 2014.
- The tourism industry paid \$4.9 billion in wages and salaries, up 7% from 2016, and a 31% increase since 2007.
- In 2017, there were approximately 20.6 million overnight visitors in British Columbia who spent \$11.2 billion. Over half of the visitors (52%) were British Columbia residents. Visitors from other parts of Canada accounted for 21% of all visits and international visitors accounted for the remaining 25% of visitor volume. While British

<sup>18</sup> Destination Canada. 2020. Corporate News. Canada Experiences Third Consecutive Record-Breaking Year for Tourism In 2019. <https://www.destinationcanada.com/en/news/canada-experiences-third-consecutive-record-breaking-year-tourism-2019>

<sup>19</sup> Destination Canada. 2020. Corporate News. Canada experiences third consecutive record-breaking year for tourism in 2019. <https://www.destinationcanada.com/en/news/canada-experiences-third-consecutive-record-breaking-year-tourism-2019>

<sup>20</sup> Destination British Columbia. 2019. Value of Tourism Trends From 2007–2017. [https://www.destinationbc.ca/content/uploads/2019/10/2017-Value-of-Tourism\\_FINAL.pdf](https://www.destinationbc.ca/content/uploads/2019/10/2017-Value-of-Tourism_FINAL.pdf)

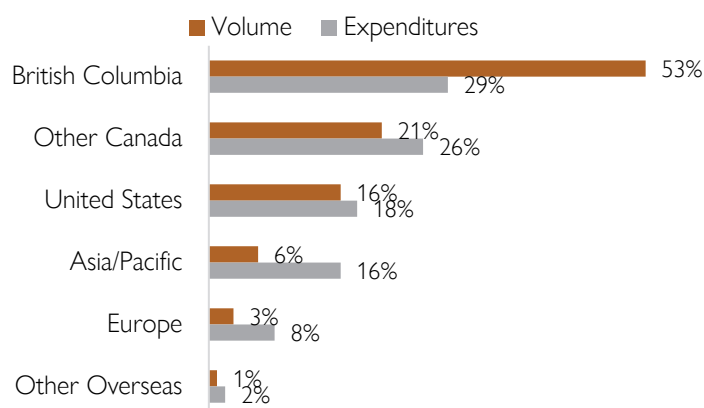
<sup>21</sup> See more detail about tourism businesses in report section 3.5 BC Tourism Labour Market.

Columbia residents made up the largest share of visitor volume, international visitors made up 45% of visitor expenditures. British Columbia residents accounted for 29% of visitor expenditures and other Canadian residents accounted for the remaining 27% (Figure 3).

Similar to global tourism indicators, more recent BC tourism performance indicators showed that 2019 was a moderate year of growth for the BC tourism industry. There was an estimated increase of almost 4% in total overnight visitors, while domestic visitors grew by 3%. In addition, food service and drinking place receipts were up 3%, passenger volume to YVR was up 2% daily room rates were up 2%, while BC provincial hotel occupancy rates were flat (Figure 4).

2020 is expected show negative growth due to the early 2020 onset of the COVID-19 virus. Time will tell the impact of the virus on the global, Canadian and BC tourism industries. Over the longer-term, tourism will continue to grow and be a driving force of the BC economy.

Figure 3: Market Share of BC Visitor Volume and Expenditures 2017



Source: Destination British Columbia. 2019. Value of Tourism Trends From 2007–2017.

Figure 4: BC Tourism Performance 2019

	2019	Change from 2018
<b>Total Overnight Visitors<sup>1</sup></b>	<b>22,757,000</b>	<b>3.5%</b>
Domestic	16,779,000	3.7%
International	5,978,000	2.7%
<b>Total Passenger Volume to YVR<sup>2</sup></b>	<b>22,334,905</b>	<b>1.6%</b>
Provincial Occupancy Rate <sup>2</sup>	73.2	0.0%
Provincial Average Daily Room Rate <sup>2</sup>	\$197	2.2%
Provincial Restaurant Receipts <sup>2</sup>	\$10.439 M	3.4%

Sources:

1. Destination British Columbia. 2020. Tourism Industry Conference presentation by Ryan Staley. 2019 overnight visitor statistics are estimates by Destination BC.

2. Destination British Columbia 2020. Provincial Tourism Indicators 2019 Year to Date (January 2020).

[https://www.destinationbc.ca/content/uploads/2020/02/Provincial-Tourism-Indicators\\_January-2020.pdf](https://www.destinationbc.ca/content/uploads/2020/02/Provincial-Tourism-Indicators_January-2020.pdf)

Note: Provincial Occupancy Rate, Average Daily room rate and restaurant receipts are estimates to October 2019.

### 3.3.2 Federal and Provincial Tourism Strategies and Plans

#### Federal Tourism Strategy

A new federal tourism strategy, *Creating Middle Class Jobs: A Federal Tourism Growth Strategy* was launched in March 2019. The strategy includes new funds, programs, and campaigns that are applicable to Indigenous tourism and labour market initiatives. These include:

- The **Canadian Experiences Fund** to enhance tourism across five product lines including shoulder season and winter tourism, farm-to-table tourism and Indigenous tourism. (\$58.5 million over two years).
- **Canada Arts Presentation Fund** through investment in professional live arts events. (\$16 million over two years).
- The **Building Communities Through Arts and Heritage and Celebration and Commemoration Programs** to increase opportunities to enjoy celebrations and commemorations of national significance that showcase Canada's diverse cultures and history at community festivals and events. (\$24 million over two years).
- Supporting **Capital Assets in Canada's National Parks, Conservation Areas and Historic Sites** which provides \$368 million over two years to support capital projects.
- **Destination Canada's Domestic Marketing Campaign** focusing on off-peak and Indigenous offerings.
- The **Community Opportunity Readiness Program** for Indigenous economic opportunities.
- The **Food Policy for Canada** to support food and food systems including agriculture and seafood products.
- **Student Work Placement Program** with the object to provide additional work placement opportunities in the tourism sector for post-secondary students.
- **Tourism Market and Export-Ready Program** for Chinese visitors for tourism businesses that are looking to expand their impact in the Chinese market.
- **New Horizons for Seniors Program** which includes some projects to combat ageism in the workplace and promote the labour market attachment of seniors.
- **Enhancing the Guaranteed Income Supplement Earnings Exemption for Low-Income Seniors Who Work** might prompt more low-income seniors to remain in or re-enter the labour market, helping address labour shortages in the tourism sector.
- **Indigenous Entrepreneurship Program** which to increase the number of viable businesses in Canada that are owned and controlled by Indigenous Canadians by providing access to capital for Indigenous businesses, improving access to business opportunities for Indigenous businesses and advocating and informing employers about the hiring of Indigenous peoples.

#### Destination Canada

Destination Canada is a federal Crown corporation owned by the Government of Canada. Destination Canada works with partners in provincial and territorial governments and stakeholders in the tourism industry to help Canada's tourism businesses reach international markets. Destination Canada works under three strategic objectives.<sup>22</sup>

- **Objective 1:** Increase demand for Canada with innovative marketing by leisure marketing and the business events Canada program.

<sup>22</sup> Destination Canada. 2018. 2019-2023 Corporate Plan Summary. Updated in June 2019. [https://www.destinationcanada.com/sites/default/files/archive/857-Destination%20Canada%20Corporate%20Plan%20-%202019-2023/2019%20Corporate%20Plan%20Summary\\_2019-07-23\\_EN.pdf](https://www.destinationcanada.com/sites/default/files/archive/857-Destination%20Canada%20Corporate%20Plan%20-%202019-2023/2019%20Corporate%20Plan%20Summary_2019-07-23_EN.pdf)

- **Objective 2:** Advance the commercial competitiveness of the tourism sector by hosting trade shows and events, improving Canada's competitive positioning and improving our research analytics and developing stronger industry data.
- **Objective 3:** Increase corporate efficiency and effectiveness.

Destination Canada has an agreement with the Indigenous Tourism Association of Canada for the continued development of Indigenous tourism destination and product awareness. Under this agreement, the agencies partner on research to give Indigenous tourism businesses a competitive advantage and facilitates space within their trade platforms for Indigenous tourism entrepreneurs to gain access to international markets.

### British Columbia's Strategic Framework for Tourism

The Strategic Framework for Tourism in British Columbia is titled *Welcoming Visitors – Benefiting Locals – Working Together 2019-2021*. It sets out the provincial vision for a prosperous and sustainable tourism sector over the next three years. The framework has an ambitious target of 6% revenue growth by addressing capacity challenges and exploring new opportunities within communities.

The vision:

*Our vision is to build a strong, sustainable tourism sector that benefits all British Columbians. Our new strategic framework is built on a foundation of sustainability which calls for consideration of the benefits of the sector along with its economic, sociocultural and environmental impact.*

Indigenous tourism within the Strategic Framework is within the pillar of “Supporting People and Communities” with the objective of supporting people and communities to increase quality of life and increase support and celebration of Indigenous cultures through tourism.

Specific actions are identified within the priority of “Reconciliation Through Tourism”:

- Preserve and promote the living culture and rich heritage of Indigenous peoples through tourism.
- Help Indigenous communities and tourism businesses get the skills they need to continue to develop tourism experiences.

The Province's target of 6% annual growth in tourism revenue across the province will be measured through the following key indicators:

- Total tourism revenue
- Tourism employment growth
- Average tourism related wage growth
- Number and type of tourism businesses
- Investments in arts, culture, and sport, events and festivals
- Investments in recreation and parks
- Visitor perception of BC as a travel destination

## Destination British Columbia

Destination BC, an industry-led Crown corporation works to deliver the provincial government vision for a prosperous and sustainable tourism sector. The organization works collaboratively with tourism stakeholders around the province to co-ordinate tourism marketing at the international, provincial, regional and local levels. It also supports regions, communities and Indigenous people in developing or expanding tourism experiences, businesses and jobs.

Destination BC's updated Corporate Strategy 2020-2023<sup>23</sup> aims to share the transformative power of BC experiences with the world. To grow sustainable social, cultural, environmental and economic benefits for all British Columbians.

The updated strategy focuses on working with industry in place making and place branding to draw visitors to more places in BC, at more times of the year to show the best of BC to the world. The strategy aims to fulfill the 6% annual revenue growth target by increasing increase visitation to more areas in BC, across more seasons. The strategic imperatives are:

**Invest in Iconics** – Creating iconic, inspirational routes and areas that will strengthen the travel appeal of all parts of our province in all seasons.

- Seasonal and Geographic Dispersion
- **Place Making:** Developing remarkable experiences by integrating destination development and marketing and fostering development of appealing products, destinations, services and events.
- **Place Branding:** Amplify the appeal of BC's iconic places with shared branding and innovative, data-driven marketing.

**Destination Stewardship** – Growing tourism sustainability by balancing the social, cultural, environmental and economic dimensions of our industry.

- Support UNDRIP, Truth and Reconciliation Calls to Action by working with Indigenous Tourism BC, industry and governments to support Indigenous Communities to benefit from tourism.
- Work with government and industry to support implementation of Clean BC, the provincial strategy to reduce carbon pollution, the use of clean energy, and reduce waste. Also, support the United Nations sustainable development goals, create accessible tourism experiences and inclusive employment and build public support for tourism and preserve our social license.

**Integrated Industry** – Building scale by working more closely together, creating efficiency through complementary roles, and sharing assets across the entire BC ecosystem.

- Tourism Data Hub
- Integrated Development and Marketing
- Collective people power
- Complementary roles

Destination BC has identified they will be partners in Indigenous tourism development by committing \$4 million partnership funding to Indigenous Tourism BC to grow the benefits of tourism for Indigenous communities. This

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<sup>23</sup> Destination British Columbia. 2020. Corporate Strategy 2020-2023. [https://www.destinationbc.ca/content/uploads/2020/03/Destination-BC\\_Corporate-Strategy-2020-2023\\_FINAL.pdf](https://www.destinationbc.ca/content/uploads/2020/03/Destination-BC_Corporate-Strategy-2020-2023_FINAL.pdf)

includes funding for six regional Indigenous Tourism Specialists, working to increase the number of Indigenous tourism businesses, their market-readiness, and the number of visitors who had an Indigenous tourism experience.

### 3.3.3 Indigenous Tourism Strategies

#### Indigenous Tourism Association of Canada

The Indigenous Tourism Association of Canada (ITAC) recently released an updated five-year strategic plan to accelerate the growth of Indigenous tourism in Canada. The plan will guide ITAC from 2019 to 2024 and sets the following targets:

- **Total Indigenous Tourism Revenues in Annual Canadian GDP** – increase of \$800 million to \$2.2 billion
- **Total Indigenous Tourism Jobs** – increase to 49,383
- **Total Export-Ready Indigenous Tourism Experiences:** – increase to 200.<sup>24,25</sup>

Key highlights of ITAC's priorities include development, marketing and leadership.

#### 1) DEVELOPMENT

- ITAC will develop Indigenous culinary experiences to leverage extensive consumer interest in meaningful and quality culinary experiences (\$3.5 million over 5 years).
- ITAC will educate consumers on the importance of the authenticity of Indigenous artisan products and promote authentic Indigenous artisans and craftspeople to increase their sales and revenues. (\$2.65 million over 5 years).
- ITAC will expand the **Experience Development Micro Grant Program** to help a larger proportion of the applicants and assist those in the initial stages of business planning. (\$6.5 million over 5 years).

#### 2) MARKETING

- ITAC will increase the presence and preparedness of Indigenous tourism businesses at international trade shows so that more Indigenous tourism experiences are offered for sale in international distribution channels. (\$2 million over 5 years).
- ITAC will expand digital and social media asset creation and distribution to better tell the stories of Indigenous peoples, businesses, and experiences through content, video and photography. (\$2 million over 5 years)
- ITAC will drive sales of Indigenous experiences directly to consumers and the travel trade through targeted marketing, packages, and media partnerships. (\$10 million over 5 years).
- Consumers and trade prefer to access services and gain information in the language of their choice and ITAC will build multi-language platforms to address rapidly growing demand from overseas markets. (\$1.25 million over 5 years).
- ITAC intends to represent respective regional Indigenous nations at the ports of entry (airports and cruise ship terminals) to increase the Indigenous presence in airports and cruise ship terminals to target new visitors to Canada. (\$5 million over 5 years).

<sup>24</sup> Indigenous Tourism Association of Canada. 2017b National Guidelines: Indigenous Cultural Experiences. <https://indigenoustourism.ca/corporate/wp-content/uploads/2017/11/ITAC-Indigenous-Cultural-Experiences-Guide-web.pdf>.

<sup>25</sup> Export-ready tourism experiences are those that are ready for international tourists and meet standards that are developed by travel trade including product and pricing and health and safety standards. For more information on export ready requirements see, ITACs national guidelines Indigenous Cultural Experiences referenced above.

- ITAC will capitalize on Canada's natural competitive advantages and develop niche marketing campaigns for unique and differentiating experiences for winter experiences, fishing, etc. that visitors are seeking (\$3.5 million over 5 years).

### 3) LEADERSHIP

- ITAC will continue capital investments for Indigenous tourism associations that already exist and provide support for provinces and territories developing new Indigenous tourism associations. (\$15 million over 5 years).
- ITAC will continue to deliver the annual International Indigenous Tourism Conference to ensure national coordination of ITAC strategy, marketing, product development, leadership and partnerships. (\$2.5 million over 5 years).
- ITAC will continue to invest in research to support informed and defensible decision-making and the ongoing tracking of the Indigenous tourism revenues, number of businesses and number of Indigenous tourism jobs to assess performance. (\$7.25 million over 5 years).
- ITAC will expand administration, governance, advocacy, industry participation, partnerships, and membership services, support and communications in order to continue to maximize the economic impact of Indigenous tourism industry across Canada as it grows. (\$11.5 million over 5 years).

The 2019 Memorandum of Understanding<sup>26</sup> between ITBC and the ITAC supports the continued contributions to the development and support of the Indigenous tourism industry in BC. ITBC saw this vision when it hosted the establishment of ITAC in 2015. An important element in achieving a vibrant Indigenous tourism in Canada and British Columbia is the continued sharing of experiences and expertise between the two organizations.

### Indigenous Tourism BC – Pulling Together 2017-2022 Corporate Plan

Following the *Next Phase 2012-2017 Corporate Plan*, in 2016 ITBC developed a new corporate strategy *Pulling Together 2017-2022* with the goal of assisting the Indigenous tourism industry in welcoming 2.2 million visitors and helping to generate \$1.5 billion in spending by 2022.

<b>Vision</b>	A prosperous Indigenous tourism industry connecting visitors to exceptional, authentic experiences.
<b>Mission</b>	To provide training, awareness, product development and marketing to support a sustainable authentic Indigenous cultural tourism industry in British Columbia while contributing to cultural preservation and economic development.
<b>Goals</b>	Assisting the Indigenous tourism industry in welcoming 2.2 million visitors and helping to generate \$1.5 billion in spending on trips that include an Indigenous experience by 2022.

### STRATEGIC PERFORMANCE AREAS

Four strategic performance areas are identified within the corporate strategy to deliver on the vision, mission and goals:

<sup>26</sup> <https://www.indigenoustourismbc.com/drive/uploads/2019/03/ITBC-ITAC-MOU.pdf>

### 1) *MARKETING*

- Engage with Indigenous communities and link regional tourism marketing strategies at all levels.
- Improve customer data sharing between ITBC and marketing stakeholders to increase market power.
- Create and curate digital content that captures the emotional power of the Indigenous experience, and regularly distribute it through partners that can best reach qualified audiences and influence them to seek out more related content.
- Invest in multi-channel digital marketing campaigns focused on key Indigenous tourism corridors that will drive more qualified leads to marketing stakeholders and select booking channels during shoulder seasons.

### 2) *EXPERIENCE DEVELOPMENT*

- Support Indigenous communities new to tourism with assistance pathfinding.
- Cluster existing market-ready and export-ready Indigenous businesses amongst Indigenous communities to develop Indigenous tourism destinations that will enhance and support growth.
- Leverage tourism industry and Indigenous B2B platforms that connect ITBC with Tier1, 2 and 3<sup>27</sup> businesses committed to improving.
- Focus on service delivery to improve strategic alignment between ITBC, Destination BC, Indigenous communities and entrepreneurs.
- Partner to deliver business development and training programs that empower communities and local entrepreneurs to build-up BC's inventory of Indigenous experiences.
- Work with high potential market-ready product to better meet wholesaler contract terms and help these Receptive Tourism Operators better communicate their Indigenous experience inventory to downstream retailers in key ITBC markets.

### 3) *PARTNERSHIPS AND SPECIAL PROJECTS*

- Pursue partnerships that directly support ITBC core values and contribute directly to stakeholder development.
- Negotiate federal and provincial partnerships that lead to multi-year funding, adding certainty and sustainability to ITBC operations.
- Develop and implement MOUs with key Indigenous and non-Indigenous organizations to enhance program delivery to a wider stakeholder base.
- Develop sustainable tourism-related business opportunities that will generate program revenue for ITBC.

### 4) *LEADERSHIP AND ORGANIZATIONAL EXCELLENCE*

- Improve corporate communications systems and processes to provide a wide range of stakeholders with more timely and valuable information and updates.
- Engage in forums that provide effective two-way communication with stakeholders and partners.
- Streamline processes and implement solutions to improve stakeholder servicing and reduce operational complexity.
- Modernize human resource policies and institute an employee performance management framework.
- Renew ITBC core values and cascade them through the organization to drive performance.

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<sup>27</sup> Indigenous tourism business piers were first described in the 2005 Aboriginal Cultural Tourism Blueprint Strategy for BC. Tier 1 is the business start up phase, tier 2 is existing but not market ready and tier 3 is market ready.

- Work with ITBC to develop staff training plans focused on building higher-performing internal teams.
- Standardize collaborative work processes.

In 2019, ITBC developed a *Provincial Alignment Plan 2019-2021* which provides further focused direction for the final three years of the *Pulling Together Corporate Plan*. The Provincial Alignment Plan identifies the areas that will make the biggest impact in achieving the corporate goals. This plan also focuses on creating alignment with our Indigenous, provincial, regional and federal partners so we continue to improve BC's collaborative tourism network.

For the next three years, ITBC will make strategic choices to execute the best role for the organization with proficiency and excellence, compared with trying to move all projects ahead with limited budget and staff constraints, and not delivering as well as potential. It will make choices that are driven by bringing benefits to Stakeholders, Indigenous nations and the organization. Figure 5 summarizes four shifts for each performance area.

Figure 5: ITBC Strategic Choices

Performance Area	Shift
Leadership and Organizational Excellence	Strengthen ITBC's Position as a Global Leader in Indigenous Tourism Development
Partnerships and Special Projects	Stand Shoulder to Shoulder on Fewer, Focused Core Projects that Drive our Goals
Experience Development	Carve a Clearer Path for a New Generation of Strong and Proud Market-ready Business Leaders
Marketing	Strengthen ITBC's Position as a Global Leader in Indigenous Tourism Development

Source: Indigenous Tourism BC. 2019. Provincial Alignment Plan 2019-2021.

This plan outlines the way forward to meet the common goals ITBC shares with its partners including the growth in BC Indigenous Tourism Revenues in Annual Canadian GDP and the growth in Indigenous tourism jobs.

## TARGETS

*Pulling Together* identified \$5 million in increased Indigenous tourism revenue earnings annually culminating at \$75 million in 2021/22 and an increase of 40 new market-ready Indigenous businesses growing from 88 in 2017/18 to 128 in 2021/22. The *"The Next Phase" Tourism Performance Audit Report 2012-2017*, provided updated numbers that showed BC had far exceeded the *Pulling Together* targets for Indigenous tourism revenues and Indigenous tourism jobs.

ITBC's Provincial Alignment Plan 2019-2021 identified new targets are identified that build on the foundation of growth and are aligned with the Canadian targets identified by ITAC in their *Five-Year Plan: 2019-2024*. Targets have also been set for 2022/23 in line with the three-year time horizon of this strategy (Figure 6).

Figure 6: ITBC Performance Targets to 2022/23

	2017/18 Baseline	2020/21 Target	2021/22 Target	2022/23 Target
BC Indigenous tourism revenues in annual Canadian GDP	\$970M	\$1,291M	\$1,420M	\$1,562M
Indigenous tourism jobs	7,428	8,599	9,029	9,408
Visitors who had an Indigenous experience	1,915,715	2,123,988	2,198,127	2,417,939
Visitor spending that included an Indigenous experience (000's)	\$1,269,034	\$1,456,509	\$1,524,965	\$1,677,461
Total Indigenous businesses	401	533	587	645
Market-ready Indigenous businesses	88	118	128	138

Source: Indigenous Tourism BC. 2019. Provincial Alignment Plan 2019-2021.

Notes:

1. Indigenous tourism revenues in annual Canadian GDP baseline from "The Next Phase" Tourism Performance Audit Report 2012-2017, with 10% increases annually.
2. Indigenous tourism jobs baseline from "The Next Phase" Tourism Performance Audit Report 2012-2017, with 5% increases annually, similar to the ITAC strategy increases.
3. Visitors who had an Indigenous experience 2017/18 baselines are from ITBC Corporate Strategy, with a 10% increase for 2022/23.
4. Visitor spending 2017/18 baselines are from ITBC Corporate Strategy, with a 10% increase for 2022/23.
5. Total Indigenous businesses baseline from "The Next Phase" Tourism Performance Audit Report 2012-2017, with a 10% increase annually. 2012 to 2022 forecast from ITBC Corporate Strategy was for a 7.9% average annual increase; with incremental focus this strategy targets higher than average growth rates.
6. Market ready Indigenous businesses 2017/18 baselines are from ITBC Corporate Strategy, with a 10% increase for 2022/23.
7. Information on methodology used in "The Next Phase" Tourism Performance Audit Report 2012-2017 can be found within the document, The Conference Board of Canada states the number of Indigenous tourism businesses in BC is 341 in the Canada's Indigenous Tourism Sector – Insights and Economic Impacts report, May 2019. These numbers were originally sourced from ITAC Business Inventory. The report also states there are 524 million in revenues, 6,957 direct jobs from employment in the Indigenous tourism sector in BC, 167 in labour income, and 260 million in GDP (basic prices). ITBC has chosen to continue to use the same methodology that was established in BC and has been used since the Blueprint Strategy, working with the same researchers.

### 3.4 Indigenous Tourism Economic Impact

In 2018, the Indigenous Tourism Association of Canada (ITAC) partnered with The Conference Board of Canada to conduct research into the current state of the Indigenous tourism industry in Canada. This research demonstrates that the Indigenous tourism sector growing at a rapid rate, outpacing overall Canadian tourism growth. The direct economic benefits (GDP) attributed to the Indigenous tourism sector in Canada rose 23% from \$1.4 billion in 2014 to \$1.7 billion in 2017. Compared with a 12% increase in overall tourism activity in Canada, this growth shows the recent and momentous acceleration of the Indigenous tourism sector across the country (Figure 7).<sup>28</sup>

In terms of direct economic impact, BC generated \$167 million in labour income, \$260 million in direct GDP and \$524 in revenues. When total economic impacts are considered (direct, indirect, induced), in 2017, BC exceeded \$1,271 million in output (equivalent to GDP of \$970 million).<sup>29</sup>

<sup>28</sup> Conference Board of Canada. 2019. Canada's Indigenous Tourism Sector. Insights and Economic Impacts. [https://indigenoustourism.ca/corporate/wp-content/uploads/2019/05/10266\\_IndigenousTourismSector\\_RPT.pdf](https://indigenoustourism.ca/corporate/wp-content/uploads/2019/05/10266_IndigenousTourismSector_RPT.pdf)

<sup>29</sup> Conference Board of Canada. 2019. Canada's Indigenous Tourism Sector. Insights and Economic Impacts.

In 2017, the Indigenous tourism sector in Canada employed just over 39,000 people while British Columbia employed 6,957 people (5,137 full-time equivalents, Figure 7). Of all the provinces, Ontario had the largest direct economic impact of Indigenous tourism<sup>30</sup> followed by British Columbia, Alberta, Quebec and Saskatchewan.

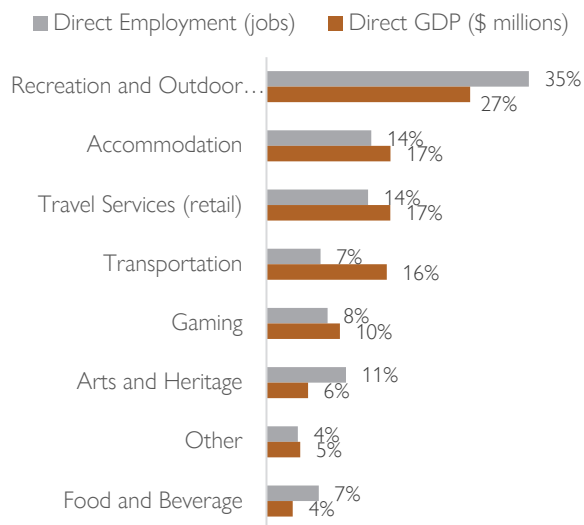
Figure 7: Indigenous Tourism Economic Impacts 2017

By sector, recreation and outdoor activities provide the largest portion of direct economic impact (jobs, GDP) followed by accommodation, travel services, transportation, gaming, arts and heritage, other businesses and food and beverage (Figure 8).

	BC	Canada
Direct Employment	6,957	39,036
Employment (full year jobs)	5,137	31,439
Labour Income (\$ millions)	\$167	\$1,140
GDP (basic prices, millions)	\$260	\$1,742
Revenues (millions)	\$524	\$3,794

Source: Conference Board of Canada. 2019. Canada's Indigenous Tourism Sector. Insights and Economic Impacts. [https://Indigenoustourism.ca/corporate/wp-content/uploads/2019/05/10266\\_IndigenousTourismSector\\_RPT.pdf](https://Indigenoustourism.ca/corporate/wp-content/uploads/2019/05/10266_IndigenousTourismSector_RPT.pdf).

Figure 8: BC Indigenous Tourism Economic Impact by Sector (% of Total)



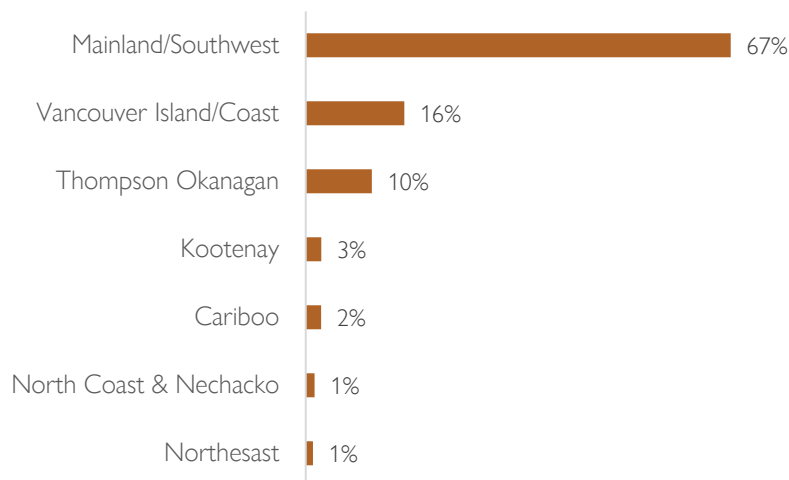
Source: Conference Board of Canada. 2019. Canada's Indigenous Tourism Sector. Insights and Economic Impacts. [tourism-watch](https://Indigenoustourism.ca/corporate/wp-content/uploads/2019/05/10266_IndigenousTourismSector_RPT.pdf)

<sup>30</sup> As measured by direct labour income, GDP and revenues.

### 3.5 Tourism Labour Market

In British Columbia, the tourism industry ranks as one of the largest sectors of the economy, as measured by employment and the number of businesses. In 2019, the BC tourism and hospitality sector employed around 310,000 people, about 12% of the provincial workforce.<sup>31</sup> Most of those were employed in the Lower Mainland / Southwest followed by Vancouver Island and the Thompson Okanagan. Together these regions totaled 92% of tourism related jobs in BC (Figure 9).

Figure 9: Distribution of Projected Tourism-Related Jobs in British Columbia, 2019 Projections



Source: Ministry of Advanced Education, Skills and Training. 2019. BC Labour Market Outlook 2019 Edition – Industry Profile

In 2017, there were 19,243 tourism-related businesses that provided \$4.9 billion in wages.<sup>32</sup> Regional analysis demonstrates that 58% of British Columbia's tourism-related businesses are located in the Vancouver, Coast and Mountains region, followed by Vancouver Island (16%) and the Thompson Okanagan (13%). Combined, Vancouver, Coast and Mountains, Vancouver Island, and the Thompson Okanagan accounted for 87% of British Columbia's tourism businesses (Figure 10).<sup>33</sup>

Most tourism businesses had less than 20 employees (share of 73%), followed by those with 20 to 49 employees (share of 18%) while only 9% of businesses had 50 or more employees in 2017. Over half of British Columbia's tourism related businesses were in the food and beverage sector (58%), followed by the transportation sector (16%), amusement, gambling, and recreation sector (10%) and accommodation sector (10%).<sup>34</sup>

<sup>31</sup> Ministry of Advanced Education, Skills and Training. 2019. BC Labour Market Outlook 2019 Edition – Industry Profile. <https://www.workbc.ca/getmedia/9ec7e790-fd53-423d-8378-91b2a62a44d6/Profile-Tourism-and-Hospitality-Sector.pdf.aspx>

<sup>32</sup> Destination British Columbia. 2019. Value of Tourism Trends From 2007–2017.

<sup>33</sup> Note: The distribution of tourism-related employment and tourism businesses is summarized using slightly different regions because the BC Labour Market Outlook use economic development regions while Destination BC uses tourism regions for analysis.

<sup>34</sup> These sectors are assumed to be businesses primary area of operation.

Figure 10: BC Tourism Businesses (Establishments) 2017

	2017	Growth Since 2014	Provincial Share
<b>British Columbia</b>	<b>19,243</b>	<b>3%</b>	<b>100%</b>
Vancouver Island	3,116	5%	16%
Vancouver, Coast and Mountains	11,175	3%	58%
Thompson Okanagan	2,471	6%	13%
Kootenay Rockies	841	3%	4%
Cariboo Chilcotin Coast	316	4%	2%
Northern BC	1,165	-4%	6%

Source: Destination British Columbia. 2019. Value of Tourism Trends From 2007–2017.

Note: Changes in methodology prevent measuring growth in businesses before 2014.

Many tourism and hospitality businesses in BC have expressed considerable concern about the impacts of labour shortages on their businesses. Over the past decade, the demand for workers in the BC tourism industry started to exceed supply significantly. The demand-supply gap is projected to increase well into the future. As development and expansion of world-class product offerings and sustained, focused marketing efforts are projected to stimulate annual revenue growth levels of 4-6% through to 2029 with job growth swelling to over 350,000 from its current 310,550 (see section 3.5.1 for more details).

A 2014 study conducted by Sentis Research described the following types of impacts resulting from labour shortages: reduced customer service, staff burnout; lost revenue; missed business opportunities; increased business costs; increased overtime; and reduced business hours of operations. To investigate the impacts further, go2HR commissioned a study to investigate the economic impacts of BC tourism labour market shortages. Grant Thornton and Econometric Research Limited conducted the study which confirmed that the BC tourism industry is facing labour constraints that are impacting businesses.<sup>35</sup>

The Grant Thornton study found that just over 50% of businesses surveyed indicated that they could not hire all the people they needed to run their business and / or expand their business in 2014.<sup>36</sup> The inability of these businesses to operate at full capacity due to labour shortages resulted in an estimated \$1,030 million in lost tourism spending (or gross revenue) across the province. The study found:

- Compared to medium-sized businesses, small and relatively large businesses demonstrated higher revenue losses attributed to labour shortages,
- The percent of unfilled positions was highest for low skilled workers (57%), followed by higher skilled workers (31%) and managers (13%). Specifically, unfilled positions were most likely to be housekeepers/room attendants (40%), cooks (38%), manager / supervisor (36%), prep cook / kitchen helper (32%) and servers (26%).

<sup>35</sup> Grant Thornton and Econometric Research Limited. 2016. BC Tourism Labour Shortage Economic Impact Study Summary Report.

<sup>36</sup> Grant Thornton and Econometric Research Limited. 2016. BC Tourism Labour Shortage Economic Impact Study Summary Report.

- The food and beverage sector experienced the largest percentage revenue losses as a result of labour constraints followed by recreation and entertainment, transportation, accommodation, snow sports and travel services.
- Business revenue losses were largest in the tourism region of Vancouver Coast and Mountains, followed by the Thompson Okanagan, the Northern BC, the Kootenay Rockies, the Vancouver Island and, lastly, the Cariboo Chilcotin Coast. The Vancouver Island reported the lowest per business revenue loss resulting from labour shortages.

Figure 11 summarizes current challenges and trends in the British Columbia tourism labour market. Recent work by go2HR identified important trends and challenges impacting the BC tourism labour market. Challenges range from those impacting all of the BC economy, like changing demographics and labour and skills shortages to those specific to the tourism industry like the seasonality, the large number of small businesses, the lack of human resource and training initiatives in tourism businesses (industry culture) and the poor awareness and perception of jobs in the tourism industry and management development.

Figure 11: Challenges in the BC Tourism Labour Market

Challenges	
Changing Demographics	About a third of the BC tourism industry's workforce is between the ages of 15 and 24, making our industry the biggest employer of youth, and twice as reliant on young workers as other sectors in the province. However, the 15 to 24-year-old population in BC is declining at a significant rate and does not stabilize and start to grow again until 2028.
Tourism Businesses in Remote or Rural Areas	Many tourism businesses are located far from the more heavily populated urban areas. As a result, some rural areas have a limited number of skilled and qualified workers living in their communities.
Seasonality	The nature of tourism products in BC make it difficult for some employers to offer year-round, full-time employment, and also to entice seasonal workers to return year after year. The pressure is greatest in rural areas and on weather-dependent sectors where peak season is dependent on weather (i.e., snow sports).
Small Businesses	Most tourism businesses in BC are small with less than 20 employees, making it difficult to effectively implement and maintain human resource and training initiatives to recruit and retain employees.
Awareness and Perception of Jobs and Careers in Tourism	Most often, people see the tourism industry as a great place to get experience or a seasonal job but are not aware or supportive of the long-term potential for a rewarding career.
Labour and Skills Shortages	Labour market research suggests that the demand for skilled workers in BC will be greater than the supply in the next decade.
Labour Policy	Future labour supply will be new workers entering the workforce for the first time. International and interprovincial migration and other unknown sources. Government legislation and policy sometimes creates barriers, instead of assistance for employers in accessing the workers they need.
Competition for Workers	There is fierce competition for skilled and qualified workers from a shrinking talent pool. This is compounded by the lure of competitive wages and lower living costs from other prosperous regions and provinces.
Industry Culture	Tourism has not traditionally considered human resources and training to be a key business imperative which will hurt future business competitiveness and earning potential.
Management Development	Most leaders in today's tourism and hospitality industry worked their way up the ranks without any formal management skill and training. There is also a lack of awareness of and access to relevant training for all managers and supervisors, especially for those new to the role.
Aligning Education and Industry	There are some areas that require better alignment of content and / or delivery models with the needs of industry. Specifically, small and rural operators are looking for accessible programming (e.g., location, cost, time), there is a need for businesses to participate in industry advisory committees and work experience / co-op programs. Also, there is a need to ensure the K-12 education system has content and teaching resources about jobs and careers in tourism are included in the curriculum development.
Infrastructure: Housing and Transportation	Lack of available and / or affordable housing has come up frequently as a serious challenge for tourism businesses throughout the province as they attempt to attract employees to their community. The lack of public and private transportation options provides serious roadblocks for employers to ensure their employees can get to and from work, especially for shifts that start early in the morning or finish late at night. This is especially true for small, rural communities.
Duplication of Efforts	Industry Groups, DMOs, Government, Educators, Economic Development have all felt pressure to take action on the labour shortages and HR challenges. There is a need to align, coordinate and communicate the efforts of private and public stakeholders to achieve the optimal return on the resources invested in HR and workforce development for tourism.

Source: go2hr.2019. BC Tourism Human Resource Strategy 2019. <https://www.go2hr.ca/wp-content/uploads/2019/07/go2HR-BCHR-Strategy-2019.pdf>

### 3.5.1 Future Tourism Labour Market Demand

Canada, including BC's tourism sector has the potential for significant growth in the coming decades, as both a contributor to the economy and a source of employment for Canadians. However, a key challenge to growing the sector persists in the labour challenges tourism operators face, especially in rural and remote regions.

#### Canada

The Conference Board of Canada estimates of potential spending by tourists and non-tourists at businesses in Canada's tourism sector indicate that demand could reach \$338 billion in 2035. Spending by foreign tourists is expected to grow the fastest, expanding by almost 120%. Spending by Canadian tourists is set to expand 63% and non-tourism demand in tourism industries will grow 40%.<sup>37</sup>

Projections of labour demand (based on economic forecasts) and labour supply (based on demographic outlooks) show the number of jobs going unfilled in the tourism sector will increase substantially over the short- and long-term. Current labour market trends suggest that 93,000 potential tourism jobs will go unfilled in 2035. This is equivalent to 4% of potential labour demand and \$10.1 billion of all potential revenue (Figure 12).

Labour demand could grow from 1.80 million full-year jobs in 2015 to 2.31 million jobs in 2035, a potential increase of 28%. The largest increase in demand for jobs will occur in the food and beverage services industry. This industry could support nearly 1.29 million full-year jobs by 2035, up from 1.02 million full-year jobs in 2015.

The projections for the potential growth of labour supply in the tourism sector indicate that overall tourism employment could rise from 1.78 million full-year jobs to 2.21 million full-year jobs by 2035. Overall, the supply of labour will not keep up with demand.

The food and beverage services industry face the greatest number of shortages, with nearly 48,000 jobs expected to go unfilled by 2035. The recreation industry has the second largest shortfall in terms of total unfilled jobs, and it is facing the most acute shortages in terms of the share of unfilled jobs as a percentage of labour demand. Of all potential jobs in recreation, almost 9% are projected to go unfilled. The food and beverage services industry face the second most acute shortage with 4% of jobs going unfilled.

<sup>37</sup> Tourism HR Canada. 2019. Tourism Labour Supply and Demand Study — National Summary— 2019 Update. <http://tourismhr.ca/labour-market-information/tourism-shortages-jobs-to-fill/>

Figure 12: Canadian Labour Supply and Demand in 2035

	Demand	Supply	Shortfall (% of Demand)
<b>Total All Sectors</b>	<b>2,308,329</b>	<b>2,214,945</b>	<b>93,384 (4%)</b>
Food and Beverage Services	1,286,164	1,238,256	47,907 (4%)
Recreation and Entertainment	348,012	317,864	30,148 (9%)
Transportation	346,384	339,107	7,277 (2%)
Accommodation	254,748	248,528	6,220 (2%)
Travel Services	73,021	71,189	1,832 (3%)

Source: Tourism HR Canada. 2019. Tourism Labour Supply and Demand Study — National Summary— 2019 Update Bottom Line: Growth Aspirations Face Labour Challenges. <http://tourismhr.ca/labour-market-information/tourism-shortages-jobs-to-fill/>

### British Columbia

The British Columbia Labour Market Outlook (BCLMO) provides a 10-year forecast of the flow of supply and demand for labour in the province. The forecast is updated every year to give British Columbians the most up-to-date information they need to make informed decisions on careers, skills training, education and hiring. The BCLMO provides a 10-year forecast for the tourism and hospitality sectors. This sector is comprised of hospitality (accommodation and restaurants), arts, entertainment and recreation, and transportation activities relevant to the movement of tourists and domestic travellers.

In 2019, the tourism and hospitality sector employed 310,550 people in BC, about 12% of the provincial workforce.<sup>38</sup> From 2019 to 2029 the sector is expected to grow by 108,025 job openings, of which 54% are to replace exiting workers. This provincial growth is at a faster-than-average pace. Regional analysis demonstrates that more than half of growth will be strongest in rural areas of the province including the Northeast (2%), in the Thompson Okanagan (2%) and Vancouver Island (1.5%, Figure 13).

Current tourism-related employment is in occupations related to food service (food counter attendants, food and beverage servers, cooks, restaurant and food service managers) or are recreation, sport and fitness leaders. Top demand moving towards 2029 are similar, but also include transportation occupations like bus drivers and other public transportation operators (Figure 14).

<sup>38</sup> Ministry of Advanced Education, Skills and Training. 2019. BC Labour Market Outlook 2019 Edition – Industry Profile. <https://www.workbc.ca/getmedia/9ec7e790-fd53-423d-8378-91b2a62a44d6/Profile-Tourism-and-Hospitality-Sector.pdf.aspx>

Figure 13: Employment and Growth from 2019 to 2029

	2019 Employment	2019-2029 Growth	2019-2029 Job Openings
<b>British Columbia</b>	<b>310,550</b>	<b>1.5%</b>	<b>108,024</b>
Vancouver Island / Coast	48,079	1.5%	18,237
Mainland/Southwest	207,096	1.4%	70,411
Thompson Okanagan	32,256	1.7%	12,069
Kootenay	7,630	1.2%	2,415
Cariboo	7,523	1.3%	2,155
North Coast & Nechako	4,363	1.3%	1,328
Northeast	3,606	2.0%	1,410

Source: Ministry of Advanced Education, Skills and Training. 2019. BC Labour Market Outlook 2019 Edition – Industry Profile.



Figure 14: Top-in-Demand Occupations Skill Level in the Tourism Industry 2019

	Occupations	Current Employment	Openings 2019-2029
<b>Management &amp; Supervisory</b>	Restaurant and Food Service Managers	20,057 (4)	9,293 (4)
	Accommodation Service Managers	4,540	2,067
	Recreation, Sports and Fitness Program and Service Directors	1,680	888
	Senior Managers – Trade, Broadcasting and Other Services	1,546	886
	Facility Operation and Maintenance Managers	1,416	861
<b>Professionals</b>	Visual Artists, Painters, Sculptors	2,870	738
	Authors and Writers	2,584	669
	Musicians and Singers	2,172	559
	Advertising, Marketing and Public Relations	1,207	365
	Financial Auditors and Accountants	1,052	427
<b>Skilled Workers</b>	Cooks	31,230 (3)	10,552 (2)
	Program Leaders and Instructors in Recreation, Sport, Fitness	10,536 (5)	3,818
	Chefs	8,542	2,756
	Bus Drivers, Subway Operators and Other Transit Operators	7,797	4,054 (5)
	Taxi and Limousine Drivers and Chauffeurs	6,434	2,438
<b>Front Line / Entry Level</b>	Food Counter Attendants and Kitchen Helpers	45,217 (1)	11,628 (1)
	Food and Beverage Servers	35,856 (2)	9,697 (3)
	Cashiers	8,567	2,592
	Light Duty Cleaners / Housekeepers	7,471	2,837
	Bartenders	5,078	1,355

Source: BC Ministry of Advanced Education, Skills and Training. 2019. BC Labour Market Outlook 2019 Edition – Industry Profile.  
North American Occupation Codes (NOC).

NOTE: Numbers in brackets represent the top five occupations.

### 3.5.2 Relevant Tourism Human Resources Plans

#### Tourism HR Canada Strategic Plan

Tourism HR Canada is the national organization working for the tourism sector in Canada. Its main goals include improving the quality and mobility of the tourism workforce and supplying tourism businesses with the labour market intelligence they need to plan for and overcome their current and future human resource challenges.

Between 2019-2021 Tourism HR Canada will focus its efforts on making progress on five strategic priorities, all aimed at addressing the thousands of job vacancies and increasing the skills or capacity to ensure individuals and businesses can thrive (Figure 15).

Figure 15: Tourism HR Canada 2019-2021 Strategic Plan

Strategic Priorities	Strategies
Leading Comprehensive Labour Market Research and Analysis	<ol style="list-style-type: none"> <li>1) Update foundational labour market data.</li> <li>2) Host annual Labour Market Forum and other consultation events to discuss current issues and inform emergent programs and policies.</li> <li>3) Increase resources and capacity to respond to specialized research needs and to foster increased collaboration.</li> </ol>
Forecasting Future Skills to Foster Growth and Innovation	<ol style="list-style-type: none"> <li>4) Establish a new comprehensive and sustainable pan-Canadian Future Skills Framework.</li> <li>5) Explore new occupational and job outlooks by gaining knowledge of the skills gaps (i.e., competencies) required of current and emergent jobs and entrepreneurial interests.</li> <li>6) Look more closely at the specialized skills needs in key economic sectors that have promising tourism growth, such as Indigenous Tourism and Culinary Tourism.</li> </ol>
Positioning Tourism as a Destination for Employment	<ol style="list-style-type: none"> <li>7) Focus on expanding the Destination Employment project to increase the number of newcomers to Canada working in tourism.</li> <li>8) Working with the Indigenous Tourism Association of Canada, develop a National Indigenous Tourism Labour Market Strategy.</li> <li>9) Explore a new program that will help tourism operators tap into international students.</li> <li>10) Develop a Diverse Workforce Strategy and campaign to market tourism jobs and entrepreneurial opportunities, with an emphasis on 'human stories' that feature illustrious career paths of industry leaders and new workers.</li> </ol>
Innovating Skills Development to Optimize the Workforce	<ol style="list-style-type: none"> <li>11) Work with leading universities and colleges to identify and pursue unique research and training initiatives.</li> <li>12) Update key Emerit training programs.</li> <li>13) Explore new just-in-time, responsive training programs in emergent skills areas, for example: market- and export-ready product development, safety and security and cultural competence.</li> <li>14) Market SMART Accreditation.</li> <li>15) Promote employer investments in staff training and professional development.</li> </ol>
Making Strategic Investments to Ensure Organizational Strength	<ol style="list-style-type: none"> <li>16) Seek funding for core labour market services and programs to ensure the sector continues to benefit from information and tools that enable businesses to be globally competitive.</li> <li>17) Identify opportunities with the private sector to share resources, seek partnerships, and co-finance projects.</li> <li>18) Review service delivery options and processes; explore alternative approaches, including increased virtual service delivery options, to ensure efficiency and sustainability.</li> <li>19) Increase nimbleness and entrepreneurial capacity by investing in further skills training and new technology.</li> <li>20) Continue to serve in an advisory capacity on government-led initiatives, and with organizations that complement strategic aims.</li> </ol>

Source: Tourism HR Canada. 2018. Tourism HR Canada Strategic Plan 2019-2021. <http://tourismhr.ca/about-us/strategic-plan/>

## BC Tourism Human Resources Strategy

Since 1979, go2HR® has served BC's tourism and hospitality industry with programs and services that support its growth and success. In 2019, go2HR® coordinated development of the BC Tourism Human Resources Strategy (THRS). The THRS identifies the labour supply and demand projections for BC's tourism industry, as well as the challenges facing the industry in addressing labour shortages. The THRS was developed to support and align with the industry's vision for growth and sustainability. With the provincial goal of world class visitor experiences, the THRS focuses on the importance of the "human element" in successfully delivering the visitor experience.

<b>Vision</b>	A thriving and skilled workforce that delivers exceptional experiences to our guests.
<b>Goals</b>	<ol style="list-style-type: none"> <li>1) BC's tourism industry attracts and retains a sufficient number of appropriately skilled employees that support the growth of the industry</li> <li>2) BC's tourism industry has access to the right training at the right time</li> <li>3) BC's tourism industry makes evidence-based workforce development decisions through relevant, current, and reliable research</li> <li>4) BC's tourism industry stakeholder efforts and resources are well-coordinated to achieve optimal return on tourism workforce investments.</li> </ol>

## STRATEGIES

The THRS identifies 11 strategies and 42 actions around the five pillars of organization and coordination, policy, research and evaluation, attraction and recruitment, retention and training and development (Figure 16).

Figure 16: BC Tourism Human Resource Strategy 2019

Pillar	Strategies
Organization and Coordination	<ol style="list-style-type: none"> <li>1) Improve and expand leadership and collaboration among industry, government and other stakeholders on the execution of the THRS.</li> <li>2) Align the THRS with provincial, regional and local tourism strategies and plans</li> </ol>
Policy, Research and Evaluation	<ol style="list-style-type: none"> <li>3) Provide input to all levels of government to help formulate/revise employment or labour market-related legislation, regulation and policy.</li> <li>4) Manage, monitor and communicate the results of the THRS Evaluation Framework on an ongoing basis.</li> <li>5) Support the gathering and maintenance of tourism labour market information</li> </ol>
Attraction and Recruitment	<ol style="list-style-type: none"> <li>6) Help employers with labour and skill shortages</li> <li>7) Increase awareness and change perceptions about tourism jobs and careers</li> </ol>
Retention	<ol style="list-style-type: none"> <li>8) Identify and help address the unique labour market challenges faced by small businesses, seasonal and / or rural tourism operators.</li> <li>9) Promote the use of progressive human resource practices by tourism employers</li> </ol>
Training and Development	<ol style="list-style-type: none"> <li>10) Encourage employer involvement and investment in training</li> <li>11) Align training and education programs with industry needs</li> </ol>

Source: go2hr. 2019. BC Tourism Human Resource Strategy 2019. <https://www.go2hr.ca/wp-content/uploads/2019/07/go2HR-BCHR-Strategy-2019.pdf>

### 3.5.3 Destination Development Planning Summary

Destination development is the strategic planning and advancement of defined areas to support the evolution of desirable destinations for travellers, with a sole focus on the supply side of tourism, by providing compelling experiences, quality infrastructure, and remarkable services to entice repeat visitation.

Destination BC initiated a comprehensive destination development planning program in 2015. Since then, the program has provided planning support to 20 planning areas throughout the province. The planning process was designed to be fueled by consumer insights and behaviors, taking into consideration the unique needs of the tourism regions and using a semi-standardized planning process to ensure all the information and data captured can be rolled up into a single provincial strategy.

In 2018, a review of labour-related issues that were identified during the 17 destination development planning processes conducted between 2016 and 2018 by Destination BC. The review identified barriers and challenges to growth as well as future opportunities.

Barriers and challenges identified were:

- Labour Shortages
All the situation analysis reviewed noted the labour shortage issue as a significant barrier to further development. The need for staff – be they seasonal or year-round – is, and will remain, one of the greatest challenges for the tourism industry. Growing businesses and expanding the visitor offer is only realistic if staff have the appropriate skills, knowledge and qualifications.
- Labour Policy
There are challenges in attracting and integrating foreign workers and with other Government programs and policies like access to EI, the Canada Jobs grant and policies related to working hours of international students. It was also identified that navigating the maze of existing policies and guidelines can be intimidating for tourism businesses and while some economic development agencies have knowledge of the policies it is not robust.
- Seasonality
Seasonal tourism jobs have difficulty competing with higher-paying sectors such as oil and gas. More year-round tourism businesses could lead to further investment of rental accommodation, daycares and full-time work in the industry. Opportunities exist for industry stakeholders to collaborate on initiatives such as cross-season job exchanges and staff sharing.
- Housing  
Affordability
The lack of affordable workforce housing was referenced in many situation analyses. The dramatic rise in assessed values of homes has exacerbated the problem and has placed another roadblock when destinations are attempting to attract employees.

Future opportunities identified were:

- Industry Education
Education about tourism careers needs to start earlier in school and new partnerships with educational institutions are needed to develop sources of skilled human resources and recruitment efforts need to look to attracting a variety of age groups.

- Improve the link between employers and post-secondary hospitality training programs to better ensure that the job skills needed by employer are reflected in the training being provided by post-secondary hospitality programs.
  - The high costs to travel and participate in tourism training present an opportunity to expand online training opportunities, providing a greater degree of flexibility for tourism operators at various times of the year and in various geographic locations. There is a recognized skills gap in the industry that has become more apparent as the use of technology increases. Offering online training will need to consider this when encouraging industry uptake.
  - In communities where foreign ownership of businesses is increasing, the need for special owner / operator training was identified to fast track the owners, or the general managers they hire, to understand the Canadian and British Columbian tourism industry, labour laws, destination marketing and management to ensure a successful transition.
- **Customer Service Training** Customer service levels could improve in tourism businesses, resulting in improved visitor experiences. Technology has shifted power from institutions to the individual consumer and at the same time, consumers are more cost-conscious. Customers increasingly expect continuity and best-practice service between various customer service channels. This expectation has been extended to the tourism industry. Consumers will expect this capability throughout their travel experience, from the smallest to largest businesses and destinations.
- **Industry Growth** Many businesses are hampered by both lack of staff and lack of investment opportunities – both of which rely on one another. As the population ages, some business owners are looking to retire, and succession planning requires immediate support. Foreign investment and ownership in BC tourism products solves one problem and then introduces a new need for customized industry training. Overlying all of this are government policies that require a tourism focus to ensure they enhance rather than detract from industry growth.
- **Value of Tourism** All of the above barriers and challenges to growth hinge on an appreciation of the value of tourism – the economic, social and environmental impacts of the industry. If local governments, residents, provincial ministries and decision-makers do not understand the industry nor value its impact, the needs of the industry will not be prioritized.

The review identified Indigenous tourism as an opportunity. There is rich Indigenous culture in British Columbia and research has demonstrated there is market demand and local desire to support and enhance market-ready Indigenous cultural experiences. Additional cultural tourism opportunities in communities can provide more experiences for visitors, assisting with addressing the seasonality in some destinations and encourage more British Columbians to engage with the tourism industry as owners, managers and employees. Although, there is a need to continue to support capacity building and training to enhance development and delivery of Indigenous tourism experiences.

Provincial commercial tenure agreements and land negotiations create uncertainty about long-term future of some tourism business ventures and could result in eliminating product offerings. The cooperation between local government

and Indigenous communities has come a long way over the last few decades. Greater communication about the reconciliation and treaty processes, understanding of protocols and local partnerships is needed.

### 3.5.4 Other Provincial, Regional, Community Labour Market Information

This section summarizes other studies relevant to the tourism labour market. It starts with information about the perception of tourism jobs, provides some BC tourism-related occupational health and safety statistics and ends with a summary of a training needs assessment for cooks that was recently conducted by go2HR.

#### Perceptions of Tourism

To help understand how tourism labour market issues can be resolved, the Conference Board of Canada conducted an online survey of the general population on perceptions and attitudes toward work in the tourism sector. The survey looked at the skills and experiences obtained by those who have worked in tourism, and finally, the survey explored people's perceptions of possible solutions and strategies aimed at reducing the labour shortage.<sup>39</sup> Key findings include:

- 27% of Canadians had work experience in the tourism sector sometime in their life, 50% of those had worked 3 years or less, while 50% had worked more than 3 years.
- Canadians were asked why they hadn't worked in tourism. The main reason most frequently mentioned was other or better career opportunities (41%), while fewer people mentioned wages (21%) and benefits (15%).
- 16% of Indigenous people said they wanted to work in tourism but could not find a job, double the overall average.
- Most respondents have a positive association with work in the tourism sector, evidenced by the fact that 62% of respondents would recommend a career in tourism to family or friends. The proportion of those who would recommend a tourism career was even higher among those who work or had worked in the industry (69%) and among Indigenous people (75%).
- Desirable tourism jobs tend to be those that are viewed as having career potential. The most desirable jobs are chefs, program leader and instructor, accommodation service manager, restaurant and food service managers, *maitres d'hôtel* and hosts/hostesses.
- Most (91%) Canadians viewed work in the tourism sector as a suitable way to increase workplace experience and jobs skills. The largest share of respondents felt it was a good source of work experience and skills for young people. Indigenous people were more likely than the general population to see tourism as a suitable means of increasing workplace experience and job skills for Indigenous people.
- 37% of Canadians believed the tourism sector has a current labour shortage while 30% did not (33% didn't know). The share of respondents who believed the sector currently has a labour shortage was significantly higher among those with work experience in the tourism sector (45%).
- Strategies ranged from those that could be implemented by individual businesses to those that would require reforms brought about by government. Overall, respondents were most likely to support strategies that required implementation by businesses or industry associations, such as, more training for employees, increased wages and benefits, providing more information about available programs, and enhancing the image of tourism jobs. Support for these programs was highest among Indigenous people and those who have previous tourism work experience. There was less support for strategies involving changes in immigration

<sup>39</sup> Conference Board of Canada. 2017. Report for Tourism HR Canada. Bottom Line. Tourism as a Destination for Employment.

programs such as reforming immigration, revising the temporary foreign worker program or introducing a seasonal immigrant work program.

A 2016 study funded by the Australian Trade and Investment Commission reviewed the literature on the perceptions of hospitality and tourism careers in five comparable jurisdictions around the world (namely the US, UK, Canada, New Zealand and France).<sup>40</sup> The key themes of analysis were the perceptions about low skilled labour, lack of opportunities for advancement, low paid sector and efforts to reduce the labour skills shortage.

- Perceptions of low skilled labour, include the perceptions of the sector offering many low skilled, entry level jobs – but few careers, there is a risk that these young people may end up working alongside those who have undertaken no such training or development, and potentially will not be afforded greater advancement opportunities and also that soft skills are critically important to the sector.
- Perceptions regarding lack of opportunities for advancement suggest there is a need to develop clear career pathways for students and prospective employees to use in mapping out their career. Otherwise, it is difficult for young people to identify and understand careers available. Many businesses rely on in-house and on-the-job training, and there is not an appropriate skills recognition system for the sector.
- Perceptions of the sector being low paid is similar across the comparative jurisdictions of the tourism and hospitality industry – this is marred by a perception of jobs in the sector being low paid compared to other sectors. The sector's reliance on ill-defined skills such as soft skills potentially add to this problem, even though it has been argued that these soft skills are a key factor in gaining competitive edge and can contribute significantly to business success.
- Effort to improve the labour shortage are addressed by improvements to education and training appear to be the main focus of addressing labour shortages. While the US and French governments have looked to reform their tourism and hospitality education systems, other countries have focused on providing more apprenticeships or other training programs. Some countries have prioritized a more integrated system, with more training programs being designed in consultation with or by industry or industry partners. The lack of knowledge about opportunities among the wider public of the opportunities available in the tourism and hospitality sector. More work is required by both industry and governments to address negative perceptions and promote the benefits of the industry to students and prospective employers.

### BC Occupational Health and Safety

Since 1917, WorkSafeBC has helped to improve the health and safety of British Columbians in the workplace by building a sustainable no-fault insurance system that supports both workers and employers now and for generations to come.<sup>41</sup> WorkSafeBC promotes a workplace of culture of health and safety and provides support for injured workers that facilitates their recovery and safe return to work. The WorkSafeBC vision is of a province free from workplace injury, disease, and death.

For the tourism industry, premiums can vary based on experience ratings and can be a costly for businesses operating on slim margins. Also, with the current tourism labour shortages it is important to ensure the business risk is low for lost

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<sup>40</sup> Colmar Brunton. 2016. Literature Review Tourism and Hospitality Careers Benchmarking. A Study for the Australian Trade and Investment Commission.

<sup>41</sup> <https://www.worksafebc.com/en/about-us/who-we-are/our-story>

time due to injuries or accidents as it is hard to replace employees on medical leave. WorkSafeBC provides accessible data on claims analysis.

For all industry sectors in BC between 2014 and 2018, there was 255,974 time-loss claims costing \$900.98 million. Of those, 26,131 time-loss claims are in the accommodation, food and leisure (7,610) services sub-sector (10%).<sup>42</sup> The cost of accommodation, food and leisure services was \$45.96 million or 5% of total. Understanding these statistics for Indigenous tourism businesses could enhance understanding of the Indigenous tourism labour market and is accessible with special analysis by go2HR (Figure 17).

Figure 17: Top Time-Loss Claims by Occupation 2014-2018

	Total (All Sub-Sectors)		Accommodation, Food and Leisure Services	
	Total	Under 24	Total	Under 24
<b>Time -Loss Claims</b>	255,974	34,294	26,131	7,264
<b>Top 5 Occupations with Claims</b>	<ul style="list-style-type: none"> <li>• Nurse-Aides/Orderlies (6%)</li> <li>• Truck Drivers (4%)</li> <li>• Construction Trades (4%)</li> <li>• Material Handlers (4%)</li> <li>• Carpenters (3%)</li> </ul>	<ul style="list-style-type: none"> <li>• Construction Trades (8%)</li> <li>• Front Counter Attendant (7%)</li> <li>• Material Handlers (6%)</li> <li>• Cooks (5%)</li> <li>• Retail Salesperson (5%)</li> </ul>	<ul style="list-style-type: none"> <li>• Cooks (19%)</li> <li>• Front Counter Attendant (19%)</li> <li>• Light Duty Cleaner (10%)</li> <li>• Food and Beverage Server (5%)</li> <li>• Janitors (4%)</li> </ul>	<ul style="list-style-type: none"> <li>• Front Counter Attendant (29%)</li> <li>• Cooks (24%)</li> <li>• Food and Beverage Server (10%)</li> <li>• Light Duty Cleaner (4%)</li> <li>• Program Leader (4%)</li> </ul>
<b>Annual Cost</b>	\$900.98 million	NA	\$45.96 million	NA

Source: WorkSafeBC. 2020. Industry Health and Safety Data. Industry Claims Analysis. <https://www.worksafebc.com/en/about-us/shared-data/interactive-tools/industry-health-safety-data>

### Training Needs Assessment for Food Service Sector

go2HR recently conducted a training needs analysis for BC's foodservice sector, focusing on the specific needs of operators of establishments that specialize in cuisines from around the globe.<sup>43</sup> Key study results were:

- There are eight restaurants in BC that specialize in Indigenous cuisine and about 8% of all chefs / cooks in BC identify as Indigenous.
- The content and context of a pilot of Indigenous Professional Cook 1 (IPC1) training in BC which ran in 2018-19 at Okanagan College and delivered the PC1 program using Indigenous foods and cultural traditions to understand how the same skills and competencies can be applied in different cultural contexts, but still be rooted in the same framework and core curriculum. The review identified that the same course outline could be adapted with up to 20% of the content being replaced with different culturally relevant examples and still retain the same framework and cover all the required skills and competencies.
- BC's food service industry is as diverse as its population.
- Both employers and those interested in a culinary career are looking for training that offers a global perspective.
- Employers would prefer that there were more short, focused courses available for further skill development.
- On-the-job training is an important part of skill development.

<sup>42</sup> WorkSafeBC. 2020. Industry health and safety data. Industry claims analysis. <https://www.worksafebc.com/en/about-us/shared-data/interactive-tools/industry-health-safety-data>

<sup>43</sup> go2hr. 2019. An Analysis of Training Needs for BC's Globally Diverse Foodservice Industry Final Report– C19Imp014.

- Employers are unaware of all the resources available to them.

The authors recommended:

- Culinary training and certification programs should include exposure to a broader range of cuisines in order to be responsive to the ever-changing needs of the food service industry
- Provision of further culinary training using short courses on specific topics or skills
- Support employers in becoming better on the job trainers
- Better communicate available government resources and programs to the diverse restaurant community
- Implementation of programs should be scalable, harmonized with other programs and there is a need to communicate and promote any new programming to industry and potential trainees

### 3.5.5 Tourism Labour Market Programs

#### Federal

The Temporary Foreign Worker Program (TFWP) allows Canadian employers to hire foreign nationals to fill temporary labour and skill shortages when qualified Canadian citizens or permanent residents are not available. For employers who have been unable to recruit Canadian citizens or permanent residents for job openings, the TFWP makes it possible to hire workers from abroad. Employers might also find a qualified foreign worker already in Canada.<sup>44</sup>

The TFWP is jointly managed by Employment and Social Development Canada (ESDC) and Canada Immigration and Citizenship (CIC). Employers often require a labour market opinion (LMO) from ESDC to hire a foreign worker. A positive LMO means that the employer has tried but has been unable to find a Canadian or permanent resident for the job, that the job offer is genuine, and that the employer has met job offer commitments to temporary foreign workers they have hired in the past.

In 2019, there were 32,031 positive labour market impact assessments in British Columbia, this was up 12% from 2018. The majority (71%) of positive impact assessments were in the mainland / southwest economic region, followed by the Thompson Okanagan (20%) and Vancouver Island (4%, Figure 18).<sup>45</sup> Please note that not all positions on a positive LMIA result in a work permit issued by Immigration, Refugees and Citizenship Canada (IRCC). In addition, not all positions are tourism-related as analysis by occupation suggests top occupation are:

- 32% are in sales and services positions,
- 17% are in trades, transport and equipment operators and related occupations,
- 15% are in education, law and social, community and government services, and
- 11% are in natural resources, agriculture and related production occupations.

<sup>44</sup> Immigration Refugees and Citizenship Canada. 2019. Temporary Foreign Worker. <https://www.canada.ca/en/immigration-refugees-citizenship/corporate/publications-manuals/fact-sheet-temporary-foreign-worker-program.html>

<sup>45</sup> Employment and Social Development Canada. 2020. <https://open.canada.ca/data/en/dataset/e8745429-21e7-4a73-b3f5-90a779b78d1e>

Figure 18: Temporary Foreign Worker Program 2019

Economic Development Region	Positive Labour Market Impact Assessments (LMIA's)	% of Total	Change from 2018
Mainland / Southwest	22,660	70.7%	16%
Thompson-Okanagan	6,293	19.6%	-8%
Vancouver Island / Coast	1,295	4.0%	45%
Kootenay	445	1.4%	-2%
Cariboo	444	1.4%	71%
Northeast	253	0.8%	89%
North Coast & Nechako	273	0.9%	90%
Other	368	1.1%	20%
<b>Total</b>	<b>32,031</b>	<b>100%</b>	<b>12%</b>

Source: Employment and Social Development Canada. Positive Labour-Market Impact Assessment Data. 2020.  
<https://open.canada.ca/data/en/dataset/e8745429-21e7-4a73-b3f5-90a779b78d1e>

On a national level, Tourism HR Canada and the Indigenous Tourism Association of Canada offer a number of business development programs and products. Tourism HR Canada programs are orientated towards the labour market while Indigenous Tourism Association of Canada programs are orientated towards business development.

### Provincial

On a provincial level, go2HR and ITBC provide a number of skills training and business development programs. Similar to the national organizations, go2HR programs are oriented toward the labour market while ITBC programs are oriented to tourism business development. In addition to the programs below, ITBCs 2019-2020 action plan reports they will:<sup>46</sup>

- Better connect market-ready stakeholders with professional development, training and learning opportunities,
- Review and update ITBC training programs,
- Revise ITBC training materials, and
- Deliver tourism training.

<sup>46</sup> Indigenous Tourism BC. 2018. 2019-2020 Indigenous Tourism BC Action Plan.  
[https://www.Indigenoustourismbc.com/corporate/content/uploads/2019/11/ITBC\\_ActionPlan\\_2019-2020\\_HR.pdf](https://www.Indigenoustourismbc.com/corporate/content/uploads/2019/11/ITBC_ActionPlan_2019-2020_HR.pdf)

Figure 19: Relevant National Tourism Human Resource / Labour Market Programs and Services

Program		Description
Tourism HR Canada	Destination Employment	Helps newcomers gain meaningful employment in Canadian hotels, giving them the experiences, they need to build a successful future in Canada. Must be a permanent resident of Canada or a protected person / refugee with a valid work permit. Not available in BC.
	Future Skills Framework	A three-year initiative to address the changing nature of work in the tourism sector; it is funded by Employment and Social Development Canada's Sectoral Initiatives Program. It will serve as a library of competency elements that are easily updated to adapt to the increasing pace of change within today's workplaces. It eliminates costly and time-consuming processes associated with updating occupation skills on a job-by-job basis.
	SMART Accreditation	A national recognition to tourism-related programs that meet or exceed industry standards, and to provide benchmarks that tourism program providers can use to assist them in continually improving their programs. Through a simple self-evaluation process and formalized third party review, programs are assessed within a standardized framework based on the evidence provided. When baseline criteria are met, programs are accredited as SMART Programs.
	emerit Skills Training and Certification	Skills training program built on work of Tourism HR Canada, industry, small business, educational institutions and large corporate enterprises. Includes <i>National Occupational Standards</i> manuals listing the skills and knowledge required to be successful in an occupation. Also, the <i>emerit Online Learning and Workbooks</i> and <i>Professional Certification</i> .
	Canadian Academy of Travel and Tourism	Introduces and promotes careers in tourism to high school students across Canada. The CATT program is integrated into the current high school curriculum and allows students to specialize in tourism through a successful work and study approach. Currently in 100 schools across Canada.
	Ready to Work	Delivers a structured transition into the tourism workforce through classroom and workplace training based on emerit National Occupational Standards. Over 11,000 unemployed and underemployed people across Canada have accessed job readiness training and career planning through the Ready to Work internship program.
Indigenous Tourism Association of Canada	RISE	In partnership with Tourism HR Canada and currently under development, is a Canada-wide Indigenous tourism standards recognition program. The project will aim to support Indigenous tourism businesses of all kinds, from authentic cultural experiences to essential tourism services in Indigenous destinations to community-based initiatives in the planning stage. The outcome will be increased readiness for all businesses, entrepreneurs and organizations who participate, enhancing their ability to attract visitors and deliver memorable, high-quality experiences.
	Tourism Development Funding Support Program	The program goal is to assist in providing expertise and funding support to Canadian Indigenous tourism businesses wishing to improve their market-ready and export-ready status in order to have the opportunity to gain greater marketplace awareness, larger volumes of visitors and sustainable business growth.
	National Guidelines	A workbook to inspire excellence in Indigenous cultural tourism (ICT) experiences across Canada. These National guidelines help to develop and deliver a "market ready" and authentic ICT product.

Sources:

Tourism HR Canada. 2020. Online program information. <http://tourismhr.ca/programs-and-services/ready-to-work-program/>Indigenous Tourism Association of Canada. 2020. Online program information. <https://Indigenoustourism.ca/corporate/>

Figure 20: Relevant Provincial Tourism Human Resource / Labour Market Programs and Services

	Program	Description
go2hr	Industry Training & Certifications	Helps businesses gain access to relevant front-line, team leadership and management skills training for their employees. Certifications included customer service (SuperHost), workplace safety and food safe. go2HR also administers FOODSAFE Level 1 by Distance Education and makes them easy for tourism employees to get the certifications they need. Also, go2HR provides on the job training support and a directory of post-secondary tourism programs.
	Labour Market Information	Coordinates and conducts industry leading research on key employment related issues and policies affecting the BC tourism labour market and is responsible for updating and monitoring the BC Tourism HR Strategy.
	Tourism Career Awareness	With the support of industry, executes a multi-channeled career awareness campaign which is designed to attract people to pursue tourism jobs and careers. The campaign targets multiple demographic groups and its tactics include promoting career fairs, school and career centre presentations, BC tourism-specific job board, Career Explorer website, e-newsletter, and social media channels such as Facebook and Twitter.
	Industry Health and Safety	Customized health and safety resources as well as administration of the Certificate of Recognition (COR) program, an incentive program which provides employers rebates on WorkSafeBC premiums if they implement systems that go above and beyond regulatory compliance. Other services include occupational health and safety courses, a resource library, webinars, roundtables to discuss industry topics and challenges, gap analysis, safety advisory services.
	Promoting Best HR Practices	Provides information to employers on HR issues such as recruitment, retention, training and legal issues through the website, e-newsletter, articles in trade publications and speaking regularly at industry events and conferences.
Indigenous Tourism British Columbia	Experience Development Training	Supports Indigenous communities to identify, create, and ensure quality visitor experiences for land- and culture-based Indigenous business with training and capacity development programs. Customer service, communication, and marketing for skills training of Indigenous individuals, businesses, and communities. Currently, specific initiatives included: Storytelling: Indigenous Tourism Interpretation Workshop, First Host Workshop, The Value of Indigenous Tourism.
	Push for Market-Readiness	An application-based program that responds directly to need of support to guide and prepare Indigenous tourism businesses and communities. The objective is to reach a market-ready status and develop sustainable growth for economic success. Based on the demand, ITBC makes funding available for the development of market-ready Indigenous tourism experiences and products.
	Indigenous Tourism Specialists	Dedicated local experts are available to connect emerging entrepreneurs, growing businesses, and interested communities to development and planning opportunities, programming, and resources that will help get your Indigenous tourism business to the next level.

Sources:

- 1) go2HR. 2020. Online program information. <https://www.go2hr.ca/>
- 2) Indigenous Tourism BC. 2020. Online program information. <https://www.Indigenousbc.com/>

### 3.6 Summary

#### Key Findings

Over the past decade the population of Indigenous people in BC has grown faster than the non-Indigenous population. As a result, the Indigenous population is younger. They also tend to more likely be early mothers and lone parents compared to the non-Indigenous population.

- Indigenous people are more likely to live in rural BC than non-Indigenous people. In fact, about a third of Indigenous people live in the mainland / southwest region compared to 63% of non-Indigenous people.

- Tourism is one of the largest and fastest-growing economic sectors in the world and in British Columbia. British Columbia's tourism industry generated revenue of \$18.4 billion in 2017, an increase of +8% from 2016. Since 2007, total tourism revenue has grown +41%. Like global tourism indicators, more recent BC tourism performance indicators showed that 2019 was a moderate year of growth for the BC tourism industry.
- 2020 is expected to show negative growth due to the early 2020 onset of the COVID-19 virus. Time will tell the impact of the virus on the global, Canadian and BC tourism industries. Over the longer-term, tourism will continue to grow and be a driving force of the BC economy.
- The federal and provincial tourism strategies have identified Indigenous tourism as a key growth sector of the tourism economy in Canada and BC. Further, the federal and provincial tourism ministries have allocated funding to accelerate development of the Indigenous tourism sectors.
- In Canada and BC, to grow a sustainable tourism industry, there is new focus on geographic and temporal dispersion of visitors. This means that moving forward Destination BC will focus on increasing visitation and tourism revenues in more areas in BC across more seasons. For emerging destinations, particularly in rural communities this improves the economic diversification and resilience of communities.
- The Indigenous tourism sector is growing at a rapid rate, outpacing the overall tourism sector growth both in BC and for Canada.

In BC projections show that the current tourism labour shortage which will deepen in coming years.

- 2016 research has demonstrated tourism business are already experiencing revenues losses due to labour shortages. The food and beverage sector experienced the largest percentage revenue losses as a result of labour constraints followed by recreation and entertainment, transportation, accommodation, snow sports and travel services. The percent of unfilled positions was highest for low skilled workers (57%), followed by higher skilled workers (31%) and managers (13%). Specifically, unfilled positions were most likely to be housekeepers / room attendants (40%), cooks (38%), manager / supervisor (36%), prep cook / kitchen helper (32%) and servers 26%).
- Regional analysis demonstrates that forthcoming tourism labour shortages will be highest in rural areas of the province including the Northeast, in the Thompson Okanagan and Vancouver Island.
- Currently, the occupations are related to food service (food counter attendants, food and beverage servers, cooks, restaurant and food service managers) or are recreation, sport and fitness leaders. Top demand for occupations moving towards 2029 are similar, but also include transportation occupations like bus drivers and other public transportation operators.
- There are numerous tourism human resource and skills training programs in place and offered by Tourism HR Canada and go2HR.
- A recent review of the content and context of a pilot of Indigenous Professional Cook by go2HR identified that the same course outline could be adapted with up to 20% of the content being replaced with different culturally relevant examples and still retain the same framework and cover all of the required skills and competencies. This suggests that current tourism training programs can be successfully adapted for Indigenous learners and contain Indigenous content.
- Currently, ITBC offers workshops in Storytelling: Indigenous Tourism Interpretation, First Host Workshop (customer service) and The Value of Indigenous Tourism.

## Challenges

This research has identified a number of challenges to overcome the labour and skills shortages that the BC tourism industry is facing.

- Many tourism businesses are in remote or rural areas are without access to a skilled workforce, valuable training programs and reliable transportation.
- The seasonal nature of tourism products in BC make it difficult for some employers to offer year-round, full-time employment, and to entice seasonal workers to return year after year. The pressure is greatest in rural areas and on weather-dependent sectors where peak season is dependent on weather.
- Slim profit margins and small businesses within the tourism industry result in poor human resources practices, with little emphasis on training and skill development and leadership development.
- As with other sectors of the economy, the rapid rate of technological change is altering the type of training required for tourism jobs, there is and will be a continual need for on-going training in the tourism sector.
- There is insufficient housing (infrastructure and affordability in some locales) for tourism employees (as well as all industries), this will impact the likelihood of recruitment of Indigenous tourism people both on and off reserve.
- The perception of tourism weakens the interest of working in the industry – action is required to combat the poor awareness of the value of tourism and perception of low-paying jobs and long-term careers in tourism.
- There is competition for Indigenous workers with other higher paying sectors of the economy.
- Some research has recommended there is insufficient alignment of tourism education and training programs and industry. Small and rural operators are looking for accessible programming (e.g., location, cost, time), there is a need for businesses to participate in industry advisory committees and work experience / co-op programs. Also, there is a need to ensure the K-12 education system has content and teaching resources about jobs and careers in tourism are included in the curriculum development.
- There are numerous agencies and educations that train and support tourism worker, yet there is a need to improve efficiencies to overcome duplication and increase alignment of efforts amongst multiple agencies. Specifically, Industry Groups, DMOs, Government, Educators, Economic Development have all felt pressure to act on the labour shortages and HR challenges. These require alignment, coordination and improved communication efforts of private and public stakeholders to achieve the optimal return on the resources invested in HR and workforce development for tourism. This is true for both Indigenous and non-Indigenous organizations and communities.
- Multiple barrier to Indigenous employment exists in the non-Indigenous tourism industry. It is necessary to develop businesses that are culturally sensitive and meet the needs of the Indigenous workforce. At the same time, supports for Indigenous people that improve confidence, skills and training, and improve awareness about available tourism jobs.
- Indigenous people tend to occupy lower paying positions in the tourism labour force – the challenge is to assist Indigenous tourism workers to move up to more senior roles in tourism businesses.
- There is a lack of businesses and employer knowledge about current employment programs.

## Opportunities

- Connect the large population of young Indigenous people with current and future vacant jobs in the tourism sector.
- Improve connection between potential Indigenous tourism employees with Indigenous and non-Indigenous tourism businesses and to improve the connection between employers and post-secondary tourism programs.

- Improve the perception of the value of long-term careers in the tourism industry, leverage the fact that more than a quarter of Canadians have worked in tourism at some point in their life and have a positive association with the industry.
- Expand online training opportunities to reduce cost of travel in order provide training opportunities for rural British Columbians.
- Continue to improve customer service levels in tourism businesses including Indigenous tourism businesses.
- Collaborate and develop partnerships on initiatives like affordable housing, transportation initiatives and other benefits like the provision of childcare.
- Adapt the current content and context of current skills training programs to provide leading learning experiences for the future Indigenous tourism workforce.
- Overcome Indigenous people barriers to finding employment in the tourism industry and to better connect rural BC tourism businesses with the rural Indigenous workforce.
- Grow the number of self-employed Indigenous British Columbians in the tourism industry.
- Engage the 20+ local Indigenous Skills and Employment Training agencies in Indigenous tourism workforce development.
- Document and broadly share the power of successful non-Indigenous business and Indigenous community partnerships related to tourism.
- Share information with non-Indigenous tourism businesses about how to engage with Indigenous communities and their workforce. Further, there is an opportunity to promote Indigenous groups ready for partnership and facilitate business-to-business mentorship in the tourism sector.
- Given the young nature of the Indigenous population and the relative low awareness of Indigenous communities by Canadian businesses, there is an opportunity to better communicate the value that young Indigenous labour force can bring to Canadian businesses.
- Tourism HR Canada has identified the need to develop a national Indigenous Tourism Labour Market Strategy with the Indigenous Tourism Association of Canada. There is an opportunity to align initiatives and priorities with ITBC's federal counterparts.
- Continue to engage more women in the Indigenous tourism sector.
- Move Indigenous tourism workers up to more senior level positions.

### Knowledge Gaps

This literature review has identified that there are some gaps in our knowledge of Indigenous tourism workforce development. They include the needs to:

- Understand if the ISETs are engaged with tourism organizations and businesses.
- Ensure there is information available that evaluates current Indigenous employment programs; there is a need to determine the status of current programs and interest in new programs.
- Further investigate the outcomes of Indigenous students who participate in post-secondary tourism programs.
- Better understand training needs of Indigenous tourism businesses and Indigenous cultural tourism businesses and align those needs with post-secondary education programs.
- Profile the difference between the needs of Indigenous cultural tourism businesses and the general tourism workforce. These differences will be identified with a future survey of Indigenous cultural tourism businesses and non-Indigenous tourism businesses.

- Gather Indigenous tourism workforce information on a community, sub-regional and regional basis. Currently, there are several studies being conducted in the province that are not yet complete. These study results could be incorporated into the findings later.
- Capitalize on the opportunity to learn about Indigenous recruitment and retention strategies used by other economic sectors (e.g., mining, health care).
- Continue working relationships between ITBC with Destinations BC, Destination Canada, and ITAC to improve research and outcomes of consumer demand for Indigenous experiences, including profiling detailed characteristics of visitors that enjoy Indigenous tourism experiences is dated.
- Developing working relationships with WorkSafeBC, go2HR and the First Nations Safety Council to better understand the Occupational Health and Safety status of Indigenous tourism businesses in British Columbia. Understanding the situation will help address labour shortages and safety concerns (if any) Indigenous tourism businesses.

## 4 INDIGENOUS LABOUR MARKET

The Conference Board of Canada<sup>47</sup> predicts that due to its aging population and low fertility rate, Canada needs new sources of talent to enter the labour force to maintain its high living standards. Between 2018 and 2040, 11.8 million people will leave Canadian schools and become workers, far short of the 13.4 million workers exiting the labour force. Along with immigration, the Indigenous labour market is viewed as a partial solution to the future labour shortages.

### 4.1 Employment

Employment, participation and unemployment rates for the Indigenous population in BC follow a similar trend to the non-Indigenous population from 2014 to 2018. Although, Indigenous labour market data confirm there continues to be a gap in the employment rate between Indigenous and non-Indigenous Canadians. Results from the Statistics Canada Labour Force Survey reveal increases in the Indigenous labour force participation and employment rates and declines in the unemployed rates over the past five years (Figure 21, Figure 22)

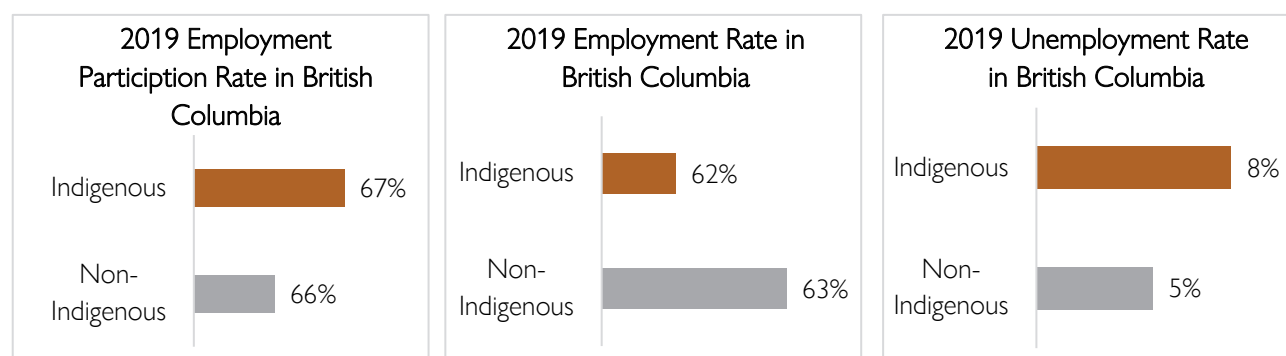
- The **participation rate** is the number of labour force participants expressed as a percentage of the population 15 years of age and over. In 2019, the participation rate for Indigenous Canadians in BC (67%) matched the rate for non-Indigenous Canadians (66%). The growth in the participation rate between 2014 and 2019 was higher for Indigenous British Columbians (6%) compared to non-Indigenous British Columbians (4%). People no longer seeking work, unable to work, or considered too young or retired are not counted in the participation rate.
- The **employment rate** is the number of persons employed expressed as a percentage of the population 15 years of age and over. In 2019, the employment rate for Indigenous British Columbians was 62% compared to 63% for non-Indigenous British Columbians. Between 2014 and 2019, the employment rate has grown by almost 8% for Indigenous British Columbians compared to 4% for non-Indigenous British Columbians.
- The **unemployment rate** is the number of unemployed persons expressed as a percentage of the labour force. In 2019, the unemployment rate for Indigenous British Columbians (8%) was higher than the rate for non-Indigenous British Columbians (5%). The unemployment rate for Indigenous British Columbians declined from 13% in 2014 to 8% in 2019. This change is larger than the decline for non-Indigenous British Columbians, 6% in 2014 to 5% in 2019.

Employment rates for Indigenous people on reserve were lower than other Indigenous groups. The gap (with non-Indigenous people) in the labour force participation rate and unemployment rates for those Indigenous people on reserve was higher than for all other identity groups between 2006-2016.<sup>48</sup> While the employment rates of Indigenous people is reported in the aggregate, there are Indigenous communities in British Columbia where economic opportunities are limited, access to employment is low, and standards of living are poor, that have indicated their

<sup>47</sup> Conference Board of Canada. 2019. Can't Go it Alone. Immigration Is Key to Canada's Growth Strategy. <https://www.conferenceboard.ca/e-library/abstract.aspx?did=10150>

<sup>48</sup> National Indigenous Economic Development Board. 2019. The Indigenous Economic Progress Report 2019. <http://www.naedb-cneda.com/wp-content/uploads/2019/06/NIEDB-2019-Indigenous-Economic-Progress-Report.pdf>

employment participation varies greatly to the provincial..<sup>49</sup>



Source: Statistics Canada. 2020. Table 14-10-0364-01 Labour Force Characteristics by Province and Aboriginal Group.

Figure 21: Employment Rates in British Columbia 2019

Figure 22: Labour Force Statistics for Indigenous and Non-Indigenous People in BC (2014-2018)

	2014	2015	2016	2017	2018
<b>Employment Rate</b>					
Indigenous Population	54.8%	53.8%	61.7%	63.2%	59.0%
Non-Indigenous Population	59.6%	59.7%	60.5%	61.9%	61.9%
<b>Participation Rate</b>					
Indigenous Population	63.0%	62.8%	69.3%	71.0%	65.7%
Non-Indigenous Population	63.3%	63.4%	64.2%	65.1%	64.8%
<b>Unemployment Rate</b>					
Indigenous Population	13.0%	14.3%	11.0%	11.0%	10.2%
Non-Indigenous Population	5.8%	5.8%	5.8%	4.9%	4.5%

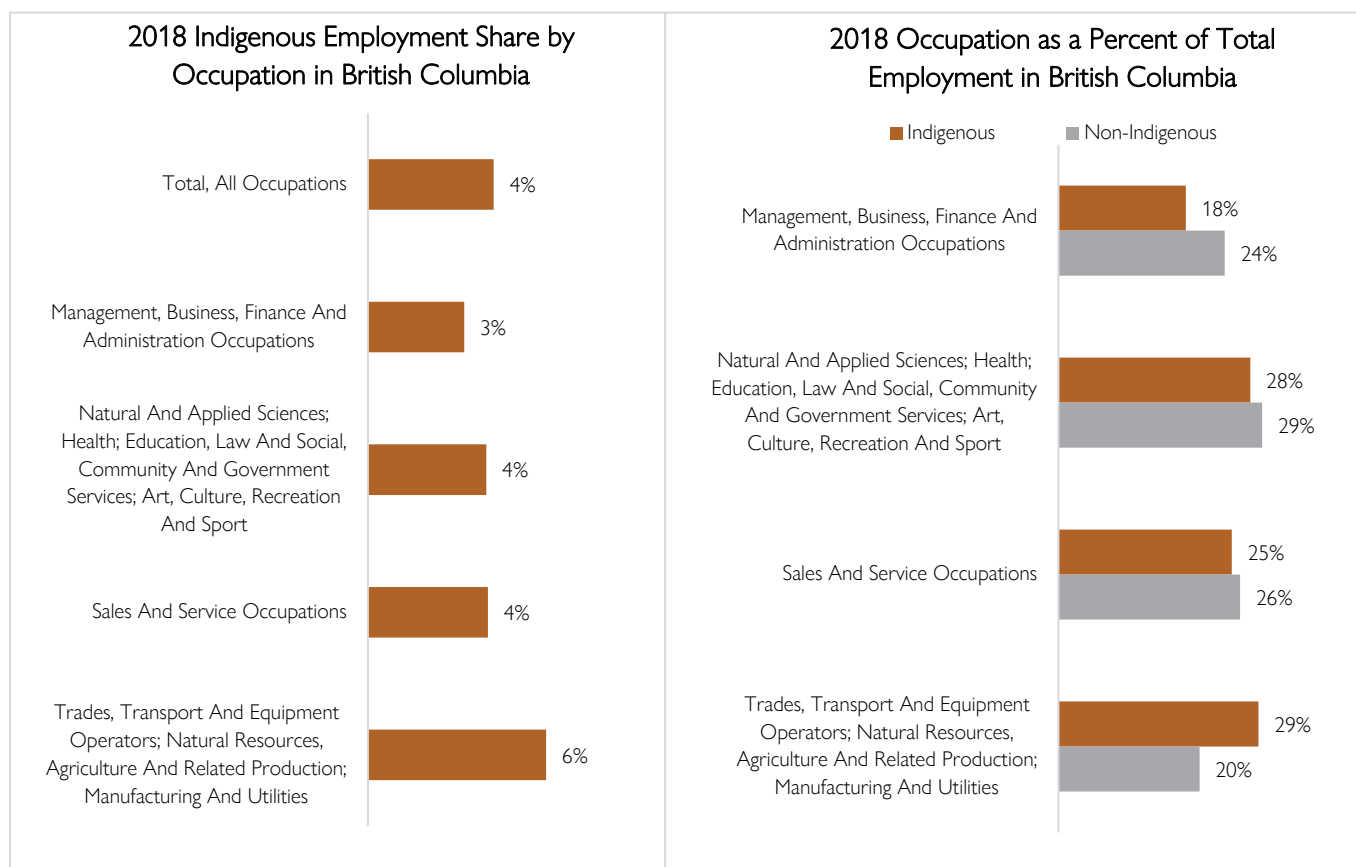
Source: Statistics Canada. 2020. Table 14-10-0364-01 Labour Force Characteristics by Province and Aboriginal Group

Overall, the share of Indigenous employment by occupation in British Columbia hovers at about 4%. The Indigenous share in trades, transport and equipment operators in natural resources and related production and manufacturing (6%) was higher than the share in sales and service, natural and applied sciences, health, education, law and social and government services (4%). The lowest share of Indigenous employment was in the management, business, finance and administrative occupations (3%, Figure 23).

Similarly, when the occupation data is explored by the percent of total for Indigenous and non-Indigenous British Columbians it is clear, that Indigenous British Columbians are less likely to be employed in a management, business, finance or administrative occupation (18%) than non-Indigenous British Columbians. Alternatively, Indigenous British Columbians are more likely to occupy jobs in the trades, transport and equipment operators in natural resources and related production and manufacturing (29%) compared to non-Indigenous British Columbians (20%).

<sup>49</sup> Strengthening the Availability of First Nations Data. [https://www.afn.ca/wp-content/uploads/2019/05/NCR-11176060-v1-STRENGTHENING\\_THE\\_AVAILABILITY\\_OF\\_FIRST\\_NATIONS\\_DATA-MAR\\_25\\_2019-FINAL\\_E.pdf](https://www.afn.ca/wp-content/uploads/2019/05/NCR-11176060-v1-STRENGTHENING_THE_AVAILABILITY_OF_FIRST_NATIONS_DATA-MAR_25_2019-FINAL_E.pdf)

Figure 23: Indigenous Employment Share by Sector in British Columbia 2018



Source: Statistics Canada. 2020. Table 14-10-0363-01 Employment by Aboriginal Group and Occupation, Selected Provinces and Regions (X 1,000). Note the Indigenous employment share by occupation is the percent of Indigenous people working in an occupation divided by total number of people employed in that occupation. The occupation as a percent of total is the total people employed in each occupation divided by the total number of people employed.

In Canada, over one in ten (11%) employed Indigenous people living off reserve were self-employed in 2017. This is similar to those Indigenous people living in British Columbia (11%).<sup>50</sup> Although, 11% is much lower than the overall rate (18%) of self-employment in British Columbia.<sup>51</sup>

The 2016 census identified that annual median income for Indigenous British Columbians in the labour force was significantly lower (\$32,332) than non-Indigenous British Columbians (\$42,291).<sup>52</sup> This is also true for annual median income after taxes (Indigenous - \$29,564, non-Indigenous - \$37,248). More recent 2019 data is available for average hourly and weekly wage rates. For Indigenous British Columbians, the average hourly wage rate is \$25.42 while non-Indigenous British Columbians earn more (\$27.74 / hour). The same trend is true for average weekly wage rates

<sup>50</sup> Statistics Canada. 2019. Labour Market Experiences of First Nations people living off reserve: Key findings from the 2017 Aboriginal Peoples Survey <https://www150.statcan.gc.ca/n1/pub/89-653-x/89-653-x2018003-eng.htm>

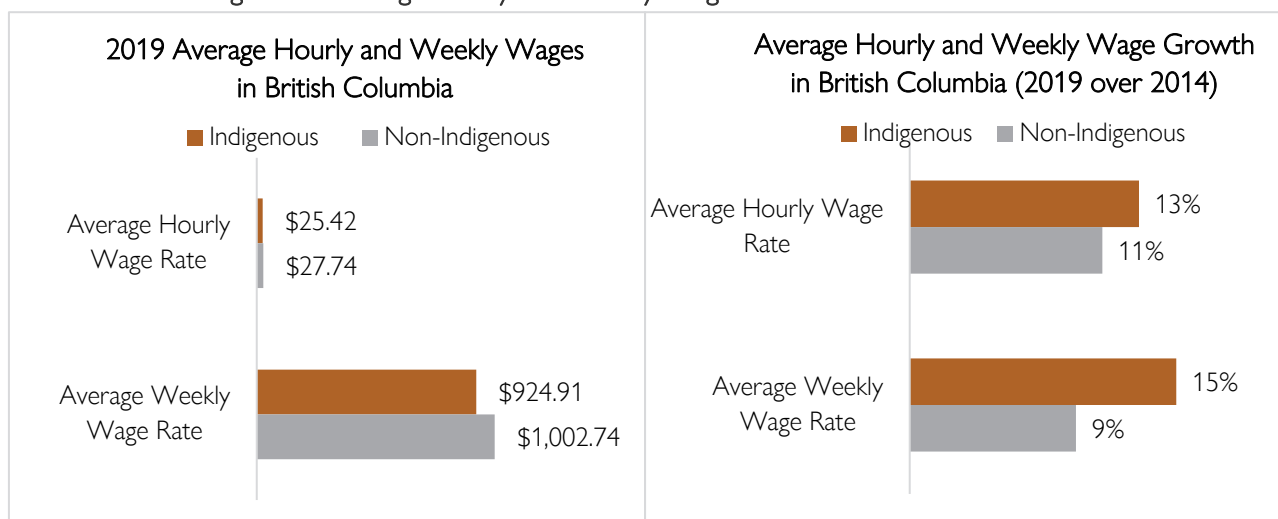
<sup>51</sup> Statistics Canada. 2019. Self-Employed Canadians: Who and Why? <https://www150.statcan.gc.ca/n1/pub/71-222-x/71-222-x2019002-eng.htm>

<sup>52</sup> Note: This is the annual median income of Indigenous and non-Indigenous people that are currently in the labour force. It does not include people that are outside of the labour force. Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016176.

(Indigenous - \$924.91, non-Indigenous \$1,002.74). This is true despite similar number of average weekly hours worked by Indigenous (35.1 hours) and non-Indigenous (34.9 hours) British Columbians (Figure 24).

Over time (2019 over 2014) Indigenous British Columbian's wage rates are increasing at a faster rate than non-Indigenous British Columbians. The average hourly rate has increased by 13% while the average weekly wage rate has increased by 15% for Indigenous British Columbians compared to 11% and 9%, respectively for non-Indigenous British Columbians.

Figure 24: Average Hourly and Weekly Wages in British Columbia 2019



Source: Statistics Canada. 2020. Labour Force Survey Table 14-10-0370-01 Average Hourly and Weekly Wages and Average Usual Weekly Hours by Aboriginal Group.

In Canada, more than half of Indigenous people (59%) participated in other labour activities that contribute to their well-being. To capture these other labour activities, the 2017 Aboriginal Peoples Survey (APS) asks about the prevalence of hunting, fishing and trapping, gathering wild plants, making clothing or footwear and making carvings, jewelry and other kinds of artwork. In BC, 28% participated in hunting, fishing or trapping, 30% gathered wild plants, 9% made clothes or footwear and 26% made carvings, drawings, jewelry or other kinds of artwork.<sup>53</sup>

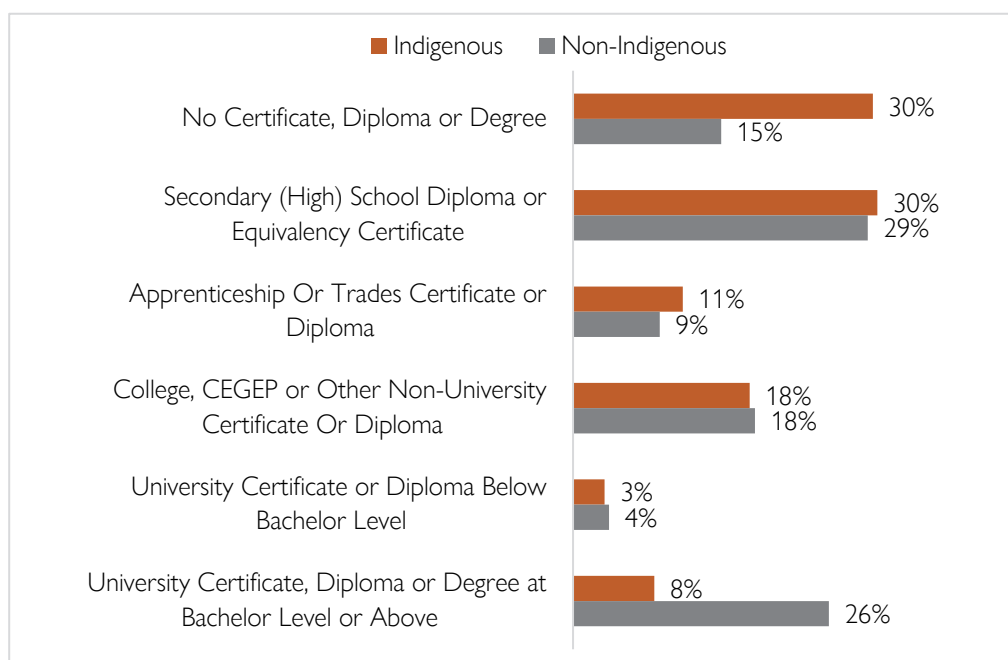
## 4.2 Education

A gap exists between Indigenous and non-Indigenous people when it comes to finishing high school and obtaining post-secondary education. In 2016, 30% of the Indigenous British Columbians did not have a high school certificate, diploma or degree compared to 15% of the non-Indigenous British Columbians. Further, about 30% of BC's Indigenous population had a secondary school diploma or equivalency certificate while another 40% had some post-secondary education (including 8% who had a University certificate, diploma or degree). A much higher proportion of BC's non-Indigenous population had some post-secondary education (57%, including 26% who had a University certificate, diploma or degree) compared to the Indigenous population (40%, Figure 25).

<sup>53</sup> Statistics Canada. 2018. Labour Market Experiences of First Nations People Living Off Reserve: Key Findings from the 2017 Aboriginal Peoples Survey.

The BC Ministry of Education estimates that in 2000, only 39% of Indigenous students graduated from high school in BC, compared to 78% of non-Indigenous students. This improved in 2014 (62%) and again in 2018 (70%) but is still 16% less than non-Indigenous students.<sup>54</sup>

Figure 25: Highest Education Degree Attained in British Columbia 2016



Source: Statistics Canada 2018. 2016 Census. Catalogue Number 98-400-X2016264.

A recent study by Statistics Canada<sup>55</sup> using data from the Aboriginal Peoples Survey, found that in 2017, 1 in 10 Indigenous adults aged 20 and over living off reserve had completed a high school equivalency or upgrading program. Females, those with a disability and individuals who became a parent before age 20 were more likely than others to participate in a high school equivalency program. Those Indigenous people that completed a high school equivalency program saw the benefits. Specifically, just over half (53%) went on to receive post-secondary qualifications, compared to 22% among those with no high school diploma and 65% among those who graduated from high school.

Further analysis revealed that the probability of employment among those who completed an upgrading or high school equivalency program was higher, particularly if they also had post-secondary credentials than among those who did not complete high school. However, it should be noted that completing an equivalency program does not yield the same benefits as a high school diploma, returning to school does provide opportunities for Indigenous adults to increase their educational attainment, and therefore improve their labour market outcomes.

<sup>54</sup> Auditor General of British Columbia. June 2019. Progress Audit: The Education of Aboriginal Students in the BC Public School System. [https://www.bcauditor.com/sites/default/files/OAGBC\\_Ab-Ed-Progress\\_RPT.pdf](https://www.bcauditor.com/sites/default/files/OAGBC_Ab-Ed-Progress_RPT.pdf)

<sup>55</sup> Statistics Canada. 2019. Insights on Canadian Society. Upgrading and High School Equivalency Among the Indigenous Population Living Off Reserve. <https://www150.statcan.gc.ca/n1/en/pub/75-006-x/2019001/article/00013-eng.pdf?st=QOR4PCWf>

### 4.3 Barriers and Workforce Needs

To increase the Indigenous workers active participation in the tourism workforce it is essential to understand barriers, challenge and issues that Indigenous workers encounter in the labour market.

#### Barriers to Indigenous Employment

Barriers to Indigenous employment are well documented in the literature and range from analysis of surveys of Indigenous people needs identified by Indigenous communities and non-Indigenous businesses.

The 2017 Aboriginal People Survey identified *barriers* and factors that would help to move into the workforce for off-reserve Indigenous people to that are unemployed and for those that are not currently in the workforce. Individuals can be out of the labour force for a number of reasons including: being retired, caring for children / other family members, going to school, having a chronic illness or disability, or being a discouraged worker (those who want employment and are available to work but are not seeking work because they believe they cannot find suitable work).

For those currently unemployed, the top barriers identified were a shortage of jobs, insufficient work experience, education or training and a lack of transportation, career planning and knowledge of where to work for a job. Women were more likely to cite a shortage of jobs, lack of work experiences, not enough education / training and not knowing where to look for work as barriers compared to men. For those not in the workforce, an illness or disability, attending school, the absence of childcare and the belief that no work was available were the top barriers (Figure 26).

Other studies have identified a long list of barriers including, racism, discrimination and social exclusion, recruitment difficulties, literacy, skills education, technical, job-related skills, professional qualifications, work experience, cultural differences (including language), self-esteem, poverty and poor housing, lack of driver's license, lack of transportation, childcare, family structure, living in rural / remote areas and business labour policy (Figure 27).

Figure 26: Barriers of Unemployed and Out of the Workforce Indigenous Canadians

	Currently Unemployed (But in Workforce)	Not in Workforce
<b>Top Barriers / Challenges</b>	<ul style="list-style-type: none"> <li>• A shortage of jobs (65% men, 61% women)</li> <li>• Lack of work experience (46% men, 52% women)</li> <li>• Not enough education or training (40% men, 51% women)</li> <li>• No transportation (38% men, 36% women)</li> <li>• Not knowing preferred job (28% men, 30% women)</li> <li>• Not knowing where to look for work (21% men, 26% women)</li> </ul>	<ul style="list-style-type: none"> <li>• Illness or disability (32%)</li> <li>• Attending school (19%)</li> <li>• Absence of childcare (12%)</li> <li>• Other personal responsibilities (7%)</li> <li>• Believed no work available (5%)</li> </ul>
<b>What Would Help?</b>	<ul style="list-style-type: none"> <li>• More jobs (22%)</li> <li>• More skills training (14%) and education (13%)</li> <li>• Transportation (10%)</li> <li>• Work experience (9%)</li> <li>• Contacts/networking (4%)</li> <li>• Childcare (3%)</li> <li>• Being younger (2%)</li> <li>• Moving (2%)</li> <li>• Job finding clubs (2%)</li> </ul>	<ul style="list-style-type: none"> <li>• More education (29%)</li> <li>• Skills training (25%)</li> <li>• More jobs/work (19%)</li> <li>• Work experience (17%)</li> <li>• Resume writing skills (16%)</li> <li>• Better health (16%)</li> <li>• Contacts/networking (14%)</li> <li>• Job finding clubs (13%)</li> <li>• Transportation (12%)</li> <li>• Childcare (12%)</li> <li>• Moving (9%)</li> <li>• Help starting a business (4%)</li> </ul>

Source: Statistics Canada. 2018. Labour Market Experiences of First Nations people living off reserve: Key findings from the 2017 Aboriginal Peoples Survey. <https://www150.statcan.gc.ca/n1/pub/89-653-x/89-653-x2018003-eng.htm>

Figure 27: Summary of Barriers to Indigenous Employment

Barrier	Studies
Racism, discrimination and social exclusion	<ul style="list-style-type: none"> <li>• NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec<sup>1</sup></li> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> <li>• The Indigenous Economic Progress Report 2019<sup>5</sup></li> <li>• Knowledge Synthesis: Aboriginal Workplace Integration in the North<sup>8</sup></li> </ul>
Recruitment Difficulties (how to find Indigenous workers and communicate with them)	<ul style="list-style-type: none"> <li>• NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec<sup>1</sup></li> <li>• Working Together: Indigenous Recruitment and Retention in Remote Canada<sup>3</sup></li> <li>• Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers<sup>7</sup></li> </ul>
Literacy, Skills Education, Technical, Job-Related Skills, Professional Qualifications	<ul style="list-style-type: none"> <li>• NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec<sup>1</sup></li> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> <li>• Working Together: Indigenous Recruitment and Retention in Remote Canada<sup>3</sup></li> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> <li>• The Indigenous Economic Progress Report 2019<sup>5</sup></li> <li>• Aboriginal Peoples Survey 2017<sup>6</sup></li> <li>• Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers<sup>7</sup></li> <li>• Knowledge Synthesis: Aboriginal Workplace Integration in the North<sup>8</sup></li> </ul>
Work Experience	<ul style="list-style-type: none"> <li>• NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec<sup>1</sup></li> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> <li>• Aboriginal Peoples Survey 2017<sup>6</sup></li> <li>• Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers<sup>7</sup></li> </ul>
Cultural Differences (including language)	<ul style="list-style-type: none"> <li>• NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec<sup>1</sup></li> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> <li>• Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers<sup>7</sup></li> </ul>
Self Esteem	<ul style="list-style-type: none"> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> </ul>
Poverty and Poor Housing	<ul style="list-style-type: none"> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> </ul>
Lack of Drivers License	<ul style="list-style-type: none"> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> </ul>
Lack of Transportation	<ul style="list-style-type: none"> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> <li>• The Indigenous Economic Progress Report 2019<sup>5</sup></li> <li>• Aboriginal Peoples Survey 2017<sup>6</sup></li> </ul>
Child Care	<ul style="list-style-type: none"> <li>• 8 Basic Barriers to Indigenous Employment<sup>2</sup></li> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> <li>• Aboriginal Peoples Survey 2017<sup>6</sup></li> <li>• Knowledge Synthesis: Aboriginal Workplace Integration in the North<sup>8</sup></li> </ul>
Family structure (early parenthood, single parent)	<ul style="list-style-type: none"> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> <li>• Knowledge Synthesis: Aboriginal Workplace Integration in the North<sup>8</sup></li> </ul>
Rural / Remote areas	<ul style="list-style-type: none"> <li>• Employment as a Social Determinant of First Nations, Inuit and Métis Health<sup>4</sup></li> <li>• The Indigenous Economic Progress Report 2019<sup>5</sup></li> </ul>
Labour Policy / Poor Program Alignment	<ul style="list-style-type: none"> <li>• Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers<sup>7</sup></li> <li>• Knowledge Synthesis: Aboriginal Workplace Integration in the North<sup>8</sup></li> </ul>

Sources:

1. AXTRA. 2019. NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec. [http://axtra.ca/wp-content/uploads/2019/01/NIKA\\_Literature-Review\\_2019.pdf](http://axtra.ca/wp-content/uploads/2019/01/NIKA_Literature-Review_2019.pdf)
2. Indigenous Corporate Training Blog. 2019. 8 Basic Barriers to Indigenous Employment. <https://www.ictinc.ca/blog/8-basic-barriers-to-Indigenous-employment>
3. Conference Board of Canada. 2019. Working Together: Indigenous Recruitment and Retention in Remote Canada. <https://www.conferenceboard.ca/e-library/abstract.aspx?did=10121>
4. National Collaborating Centre for Aboriginal Health (NCCAH). 2017. Employment as a Social Determinant of First Nations, Inuit And Métis Health.
5. The National Indigenous Economic Development Board. 2019. The Indigenous Economic Progress Report 2019.
6. Statistics Canada. 2018. Labour Market Experiences of First Nations People Living Off Reserve: Key Findings from the 2017 Aboriginal Peoples Survey.
7. Conference Board of Canada. 2012. Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers. <https://www.otec.org/Files/pdf/Understanding-The-Value-of-Hiring-Aboriginal-Workers.aspx>
8. International Centre for Northern Governance and Development. 2015. Knowledge Synthesis: Aboriginal Workplace Integration in the North. <https://www.schoolofpublicpolicy.sk.ca/documents/research/archived-publications/icngd-publications/icngd-reports/Knowledge-Synthesis-Report-HallHesseln.pdf>

## Indigenous Peoples Workforce Needs

Analysis of barriers to employment for Indigenous people and analysis of relevant literature:<sup>56</sup> reveals that the Indigenous labour force could benefit from:

- Culturally accessible and safe education and skills training.
  - Programs that are accessible and have eligibility criteria that account for the reality of Indigenous youth, training institutions near where Indigenous people live and adequate funding.
  - Culturally adapted and safe training programs. This could be training programs solely for Indigenous learners or the adaption of content to Indigenous realities and cultures both in a safe learning environment.
- Access to programs that help identify preferred career choices (career guidance). This includes high school-based career counselling and professional development programs.
- Access to secure and relevant employment services, especially in urban areas.
  - Direct communication about what jobs are available as past research has found there is a lack of knowledge that these services exist.
  - This also includes training non-Indigenous people on how to best support Indigenous workers.
- Access to culturally sensitive workplaces.
- Access to work experience programs (especially for young Indigenous people), training and job advancement opportunities.
- Access to mentoring and Indigenous role models.
- Access to childcare programs and transportation to employment sites.
- Access to more contacts / networking, resume writing skills or job finding clubs.

In 2012, the Conference Board of Canada studied the value, challenges and opportunities faced by Canadian employers in recruiting and retaining Indigenous labour.<sup>57</sup> The report identified the 45% of businesses were very or somewhat challenged in retaining Indigenous employees. Large businesses and those that operated internationally were more likely to have retention challenges than other businesses. The top challenges in retention were:

- Limited career advancement opportunities (29%)
- Hiring of Aboriginal workers by other companies (25%)
- Worker reluctance to move to the job site / away from the community (25%)
- Lack of ongoing training or development opportunities (23%)
- Inadequate compensation (20%)
- Providing time for employee participation in seasonal and traditional activities (11%)
- Not enough working hours (11%)
- Too many working hours (11%)

<sup>56</sup> AXTRA. 2019. NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec.

<sup>57</sup> Conference Board of Canada. 2012. Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers.

## 4.4 Partnerships and Business Needs

### Canadian Businesses and Indigenous Engagement

A study commissioned by Indigenous Works and led by R.A. Malatest and Associates Ltd. worked to understand the status of Indigenous-corporate engagement in Canada. The research identified these key themes:<sup>58</sup>

- **There is a low awareness of opportunities** – Only half of businesses (54%) were aware of local Indigenous groups and fewer were aware of the demographic potential of Indigenous communities. Only 35% of businesses were aware of the Aboriginal Skills, Employment, and Training Strategy (now called Indigenous Skills, Employment and Training ISET), that is aims to bridge the gap between the workforce and Canadian businesses.
- **Low priority, limited capacity** – Only half of businesses wanted to do more business with Indigenous groups (49% medium or high priority), and fewer were prioritizing hiring Indigenous peoples (44%). Only a third of businesses (34%) prioritized investing in Indigenous communities.
- **Lack of strategy** – One-in-four businesses have a strategy for engaging Indigenous groups. However, these strategies are often informal, limited in scope, and developed internally without Indigenous perspectives.
- **Consultation is the exception, not the rule** – Businesses are unlikely to consult Indigenous groups when making business decisions. Overall, one-in-four businesses have consulted with Indigenous groups in the past two years.
- **Partnership is rare, but powerful** – Only 13% of businesses had any partnerships, either formal or informal with Indigenous groups. Businesses with full partnerships, geared towards both business and community goals, reported they are hiring more Indigenous people, doing more business in their communities, and seeing their reputations grow.

The study also found that substantial differences exist in engagement between sectors of the Canadian economy. Most related to tourism are the hospitality and retail sectors. The hospitality sector ‘sees’ the labour solution of working with Indigenous groups yet has not acted, whereas the retail sector is reactive and is most motivated in working with Indigenous groups and people (Figure 28).

Figure 28: Relevant Business Sector Engagement with Indigenous Groups 2017

Hospitality	Retail Sector
<i>Inactive: sees labour solution but unable to act</i>	<i>Reactive: Location is everything</i>
<ul style="list-style-type: none"> <li>• Greatest interest in tapping the Indigenous labour pool</li> <li>• Temporary Foreign Workers Program created a labour-crunch, especially outside urban centres</li> <li>• Passive approach: see labour solution but unwilling to invest resources</li> <li>• Lacking in strategy and direction (e.g., lowest ISETs awareness)</li> <li>• Interested in guidance from Indigenous groups and third-party consultants</li> </ul>	<ul style="list-style-type: none"> <li>• Most likely to be motivated by public demand, proximity to Indigenous communities and access to markets</li> <li>• Consider their workplaces accommodating, despite lowest rates of strategy or consultation</li> <li>• Highest interest in staff training and road maps for engagement</li> </ul>

Source: R.A. Malatest & Associates Ltd. 2017. Researching Indigenous Partnerships.

<sup>58</sup> R.A. Malatest & Associates Ltd. 2017. Researching Indigenous Partnerships. <https://indigenousworks.ca/sites/ahrc/files/attachments/Researching%20Indigenous%20Partnerships-Malatest%20Final%20Report-English-Oct%202017.pdf>

R.A. Malatest & Associates Ltd. used the business research to recommend that government, non-profit and industry groups could facilitate interaction between both sides of the partnership equation, boost awareness of existing opportunities and services, and invest in existing partnerships to create clusters for economic collaboration. Specifically, actions could include:

- **Promote Indigenous groups ready for partnership** – Raise the profile of existing business and employment solutions offered by Indigenous communities, namely the Economic Development Corporations (EDCs) and Indigenous Employment, Skills and Training Strategy program (ISETS).
- **Connect federally regulated businesses with Employment Equity solutions** – Federal employment equity legislation is not driving action with Indigenous groups; help connect regulated businesses with ISETS-agreement holders and other Indigenous groups through networking events or accessible databases.
- **Facilitate business-to-business mentorship to develop sectoral clusters:** Disengaged businesses do not know where to look for Indigenous groups and are waiting to be approached.

### Employer Challenges and Needs

Many of the challenges that businesses face when hiring Indigenous people mirror those that Indigenous people face when looking for work. These include:<sup>59</sup>

- Lack of qualifications, formal documentation, or certification
- Skill levels of new hires too low (e.g., literacy, technical, leadership)
- Lack of work experience
- Differences in expectations between workers and their employer
- Worker reluctance to move to job site / away from their community

In addition to the above challenges, the International Centre for Northern Governance also identified additional challenges where inadequate programs and content (e.g., funding, delivery and availability, structure, design, access and content) and lack of collaboration amongst stakeholders (e.g., government, industry, educational institutions and service providers).

### Employer Best Practices

Several studies have reported employer / business best practices or strategies for Indigenous retention, engagement and workplace development.<sup>60,61,62</sup>

1. **Business Commitment** – Business recognition of the economic potential in commitments to Indigenous groups and communities. There is very little awareness amongst Canadian businesses about the value of Indigenous partnerships.
2. **Training Contributions** – Participating in training a pool of qualified Indigenous workers. This is especially important if some potential employees do not meet educational or skills needed. Focus on essential skills and bridging programs.
3. **Mentorship** – Provide mentorship and career bridging programs.

<sup>59</sup> Conference Board of Canada. 2012. Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers. <https://www.otec.org/Files/pdf/Understanding-The-Value-of-Hiring-Aboriginal-Workers.aspx>

<sup>60</sup> AXTRA. 2019. NIKA Review of Literature: Increasing Labour Market Participation of Aboriginal Workers in Quebec.

<sup>61</sup> International Centre for Northern Governance and Development. 2015. Knowledge Synthesis: Aboriginal Workplace Integration in the North

<sup>62</sup> Conference Board of Canada. 2012. Understanding the Value, Challenges, and Opportunities of Engaging Métis, Inuit, and First Nations Workers.

4. **Workplace** – Develop Indigenous-friendly workplace programs and / or policies. Start this by learning about Indigenous history, value and cultures. Use cultural knowledge to deliver culturally appropriate material in a manner consistent with learner styles. Have an Indigenous person write materials. Provide cultural programs and cultural support staff.
5. **Community-Based Learning** – Deliver community-based and engaging programming for diverse learning styles.
6. **Stronger Collaboration** – Engage in stronger collaboration and coordination among stakeholder with a focus on long-term partnerships.
7. **Approaches** – Benefit from guidance in human resource management, and establish and implement policies for recruiting, integrating and retaining Indigenous workers.
8. **Wages and Benefits** – Offer competitive compensation and benefits.
9. **Cultural Activities** – Provide time for Indigenous workers to participate in seasonal or traditional activities.

## 4.5 Current Indigenous Employment Strategies / Programs

The federal and provincial Indigenous employment, education and skills training programs are reviewed here.

### 4.5.1 Federal Programs

This section first outlines these federal employment and skills training programs followed by a summary of post-secondary education programs.

#### Indigenous Skills Employment Training (ISETs) Program

The Indigenous Skills and Employment Training (ISET) Program is designed to help First Nations, Inuit, Métis and urban / non-affiliated Indigenous people improve their skills and find employment.<sup>63</sup> And secondarily, many ISETS assist employers with filling their labour gaps, which may include partnering in training program development and delivery, job recruitment and pre-employment screening, employer subsidies, and job coaches. In 2016 and 2017, the Government of Canada engaged with key Indigenous partners and organizations across the country to review and renew the Indigenous Skills and Employment Training Strategy (ISETS). The predecessor, the Aboriginal Skills Employment Training Strategy (ASET) program launched in 2010 providing a full suite of skills development and job training services—from essential skills such as literacy and numeracy to more advanced training for in-demand jobs.

The ISET Program builds on what was successful about ASETS and reflects what was heard from Indigenous partners. It includes:

- Distinctions-based strategies and funding streams that will help meet the unique needs of First Nations, Métis, Inuit and urban / non-affiliated Indigenous people
- Greater focus on the full continuum of skills development, from essential skills to skills upgrading
- Greater flexibility for Indigenous organizations to design programming to meet the needs of their people and communities
- Reduced administrative burden
- Increased funding to support predictable and stable training and skills development over the next 10 years

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<sup>63</sup> Employment and Social Development Canada. 2020. Backgrounder: Indigenous Skills and Employment Training Program. <https://www.canada.ca/en/employment-social-development/news/2019/07/Indigenous-skills-and-employment-training-program.html>

As part of the co-developed implementation of the renewed ISET Program, the Government of Canada will continue to work with Indigenous partners to enhance the performance strategy. This will involve collecting and analyzing data to support Indigenous partners with the design and delivery of services and programs to ensure they are responsive. The data is to yet publicly available.

The ISET Program also responds to the **Truth and Reconciliation Commission's Call to Action #7**, which calls upon the Government of Canada to develop a joint strategy with Indigenous groups to eliminate educational and employment gaps between Indigenous and non-Indigenous people in Canada. Another **Call to Action** of significance to Indigenous tourism and the labour force is **#92 Business and Reconciliation** which calls for business to involve Indigenous people in meaningful consultation and ensure Indigenous people have equitable access to jobs, training and educational opportunities and provide education for management and staff on Indigenous histories.<sup>64</sup>

There are over 80 ISET holders throughout Canada of which there are over 20 in British Columbia (see **Appendix B** for list of BC ISET employment agencies). These holders host roughly 400 additional satellite delivery locations throughout the country. Each centre serves as a direct source to help Indigenous people with their employment, training and job search requirements, each tailors its delivery mechanisms and services and strategic approach to the needs of the region and the Indigenous people. A growing number of ISETs are expanding their connections and partnerships with employers, industry and educators.

In BC, 20+ organizations provide ISET programs and services. Of these organizations, 14 grouped to create the BC A-TEAM to support and advocate for common interests to enhance their role as service providers to the 203 First Nation communities in BC, off and on reserve and Inuit peoples.

ISETS agreement is to:

- Increase Indigenous participation in the Canadian Labour Market.
- Strengthen and facilitate flexible programming that meets the unique and varied needs of Aboriginal people and employers.
- Provide employers with skilled workers.

ISET holders serve defined Indigenous groups which support any on-reserve, off-reserve urban, status and non-status Indigenous person including Métis and Inuit members living in their service area.<sup>65</sup> They typically offer skills development, job training and financial aid. Training can cover essential skills you need on the job—reading, writing and math, or it can involve more advanced training for jobs that are in demand, and provide living supports to support an Indigenous person with preparing to enter the workforce and establish a stable home life.

Types of programs ISETs may cover:

- GED or upgrading programs
- Vocational or safety ticket training
- Trade training courses, e.g., construction, plumbing, electrician, welding
- Certificate programs

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<sup>64</sup> Truth and Reconciliation Commission of Canada: Calls to Action 2020. [http://trc.ca/assets/pdf/Calls\\_to\\_Action\\_English2.pdf](http://trc.ca/assets/pdf/Calls_to_Action_English2.pdf)

<sup>65</sup> Work BC Resources for Indigenous People. 2020. Online Program Information. <https://www.workbc.ca/Resources-for/Indigenous-People.aspx>

- Diploma programs
- Partial and / or collaborative financial support for degree programs
- Partial and / or collaborative financial support for masters or doctorate

ISET funding also supports:

- Wage subsidy to a specific employer to help you get a job in your chosen field if you are already qualified
- Apprenticeships
- Summer students
- Self-employment (at some locations)

ISETs funding also provides financial help for items needed during education / training like:

- Childcare, transportation (bus, transit tickets) and other living supports (meals, clothing allowances),
- Tuition, books, fees, and
- Other equipment and supplies.

As ISETs tailor their programs and supports to their region, some offer additional supports for groups and initiatives that do not qualify in the typical ISET program compliment.

### Post-Secondary Education

Between 2017 and 2019, Indigenous Services Canada (ISC) conducted a comprehensive and collaborative review of all current federal programs that support Indigenous students who wish to pursue post-secondary education. This included discussions with Indigenous students, academic leaders and institutions to obtain a wide range of reflections on current programs and possible improvements. ISC also engaged with the Assembly of First Nations, Inuit Tapiriit Kanatami and the Métis National Council, who each developed respective distinctions-based policy proposals for transforming Indigenous post-secondary education.

Informed by this review, Budget 2019 invested \$814.9 million over 10 years and \$61.8 million ongoing for distinctions-based Indigenous post-secondary education strategies. This funding will renew and expand the Post-Secondary Student Support Program, establish new Inuit and Métis Nation post-secondary education strategies and engage with First Nations to develop regional post-secondary strategies.

Relevant program components include:<sup>66</sup>

- **Post-Secondary Student Support Program** – financial assistance to First Nations students enrolled in eligible post-secondary programs.
- **University and College Entrance Preparation Program** – financial assistance to First Nations students enrolled in university or college entrance programs.
- **Post-Secondary Partnerships Program** – supports First Nations in defining their own partnerships with educational institutions to increase the availability of post-secondary education programs tailored to First Nations' cultural and educational needs.

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<sup>66</sup> Indigenous Services Canada. 2020. Online Program Information. <https://www.sac-isc.gc.ca/eng/1100100033607/1533125081187>

- **Métis Nation Post-Secondary Education Strategy** – provides financial assistance to support Métis Nation students pursuing post-secondary education.

First Nations and Inuit Youth Employment Strategy, supports initiatives to provide First Nations and Inuit youth with work experience information about career options and opportunities to develop skills to help gain employment and develop careers. The strategy helps First Nations and Inuit youth, between the ages of 15 and 30, who are ordinarily resident on reserve or in recognized communities to:

- develop and enhance essential employability skills,
- get exposed to a variety of career options,
- understand the benefits of education as key to labour market participation, and
- gain co-operative education work and study opportunities.

The Youth Employment Strategy operates a summer work experience program and a skills link program. The skills link program assists youth to acquire essential employability and job-related skills, and to learn about job and career options, to prepare for employment and career development

#### 4.5.2 Provincial Programs

This section first outlines the provincial employment and skills training programs followed by a summary of post-secondary education programs.

##### Employment Programs

The provincial government provides specialized services to help Indigenous people prepare for success in BC's job market through post-secondary education, education funding, work experience, and building job skills. They include:<sup>67</sup>

- **Aboriginal Youth Internship Program** – A 12-month paid internship for Indigenous youth residing in BC, age 19 and under. Interns are placed in provincial government ministries for nine months and then in Indigenous organizations for the last three months of their internship.
- **Articled Student Program** – The Ministry of Attorney General hires articled law students who have a strong interest in public service and the practice of public law. It selects candidates who possess the academic, professional and personal qualities that will enable them to become effective public sector lawyers.
- **Aboriginal Business Entrepreneurship Skills Training (BEST)** – Training for Indigenous people interested in starting a small business. It is designed to help participants identify feasible business ideas. This program is managed by the Canadian Centre for Aboriginal Entrepreneurship.
- **BC's Career Guide for Indigenous People** – BC's Career Guide for Indigenous People supports the career planning journey, all the way from exploration to success on the job. The guide provides practical tools and activities, information and many resources to explore values, skills and careers that fit.<sup>68</sup>

<sup>67</sup> Work BC. 2020. Online Indigenous Program Information. <https://www2.gov.bc.ca/gov/content/governments/Indigenous-people/supporting-communities/employment>

<sup>68</sup> Work BC. 2018. Indigenous People Career Guide. <https://www.workbc.ca/getmedia/9f259552-8baf-4d22-a78c-0d5f3559ec2d/BC-Career-Guide-Indigenous-People-2018.pdf.aspx>

## Education

In 2012, the Ministry of Advanced Education, Skills and Training (the Ministry) launched the *Aboriginal Post-Secondary Education and Training Policy Framework and Action Plan* (the Policy Framework), which commits to improving outcomes for Indigenous learners with culturally relevant programs, information and services developed in collaboration with aboriginal communities and organizations.

<b>Vision</b>	Aboriginal learners succeed in an integrated, relevant, and effective British Columbia post-secondary education system that enhances their participation in the social, cultural and economic life of their communities, the province, and global society.
<b>Goal</b>	<ol style="list-style-type: none"> <li>1. Systemic change means that the public post-secondary education system is relevant, responsive respectful and receptive to Aboriginal learners and communities</li> <li>2. Community-based delivery of programs is supported through partnerships between public post-secondary institutions and Aboriginal institutes and communities</li> <li>3. Financial barriers to accessing and completing post-secondary education and training are reduced for Aboriginal learners</li> <li>4. Aboriginal learners transition seamlessly from K–12 to postsecondary education</li> <li>5. Continuous improvement is based on research, data-tracking and sharing of leading practices</li> </ol>

The last update to the framework was posted in 2015 which showed significant progress towards meeting goals and objectives. The current status of the framework is unknown.

A key objective of the Policy Framework is that public post-secondary institutions will implement policies, programs and services based on leading practices. Leading practices are those that have had successful outcomes. The Ministry provides leading practice summaries for these topic areas:

- Indigenous Advisory Councils
- Culturally Welcoming Spaces and Gathering Places
- Student Housing for Indigenous Learners and their Families
- Respectful Use of Indigenous Knowledge
- Partnerships
- Assessment and Benchmarking
- Indigenous K-12 to Post-Secondary Transitions
- Indigenous Mentorship

## INDIGENOUS SERVICE PLANS

Public post-secondary institutions work with Indigenous communities and organizations to develop and implement three-year rolling strategic plans that enhance the post-secondary educational experiences and outcomes of First Nations, Métis and Inuit learners. The goals of the program are to:

- Increase the access, retention, completion and transition opportunities for Indigenous learners,
- Strengthen partnerships and collaboration in Indigenous post-secondary education, and
- Increase the receptivity and relevance of post-secondary institutions and programs for Indigenous learners and provide support for initiatives that address barriers.

There are Indigenous service plans at 11 post-secondary institutions throughout BC including, Camosun College, Capilano University, Coast Mountain College, College of New Caledonia, Nicola Valley Institute of Technology, North Island College, Thompson Rivers University, University of Northern British Columbia, University of Victoria, Vancouver Community College and Vancouver Island University.

### INDIGENOUS COMMUNITY-BASED TRAINING PARTNERSHIPS PROGRAM

Under the Aboriginal Community-Based Training Partnerships (ACBTP) program, the Ministry of Advanced Education, Skills and Training funds public post-secondary institutions and Indigenous communities to deliver education and training to Indigenous learners to further their educational attainment and labour market participation. Funds are provided through the Ministry and the Canada-British Columbia Workforce Development Agreement. The objectives of the program are to:

- Provide Indigenous participants with post-secondary education and skills training in their communities that will lead to employment.
- Support the needs and priorities of Indigenous communities, including responding to new economic opportunities and industry needs for a local skilled labour force.
- Provide recognized post-secondary credentials or credits that are transferable.
- Enable public post-secondary institutions to work with Indigenous communities and organizations to develop and implement three-year rolling strategic plans that enhance the post-secondary educational experiences and outcomes of Indigenous, Métis and Inuit learners.

### Industry Training Authority

The Industry Training Authority (ITA) leads and coordinates British Columbia's skilled trades system. ITA works with employers, apprentices, industry, labour, training providers and government to issue credentials, supports apprenticeships, fund programs, set program standards and increase opportunities in the trades. The Indigenous Initiatives Director works closely with Indigenous communities, Indigenous Skills and Employment Training (ISET) holders, training providers and employers across BC to make trades training accessible to rural and urban communities. A few examples are:<sup>69</sup>

- **Camosun College / Vancouver Island University** – Indigenous People in Trades Training (IPTT): An introductory program that includes Indigenous culture components, life skills, essential skills, academic assessment, and industry recognized certifications. Camosun and VIU provide a 12-week trades exploration program, Foundation technical training and employment transition supports including Job Coach and Apprenticeship employment outcomes for high demand trades occupations.
- **Kitselas First Nation – Kitselas Community-Led Apprenticeship Development (KCAD)** – This program consists of orientation (introduction to Kitselas, Indigenous cultural competency, safety, apprenticeships, unions, current labour markets), essential skills training, community projects, industry certifications and job-readiness training (pre-employment counselling / coaching, professionalization, resume / cover letter writing, interview skills, job search assistance, and job applications).

<sup>69</sup> Industry Training Authority. 2020. Indigenous People in Trades Training Programs. <https://www.itabc.ca/Indigenous-people-trades-training-programs>

## 4.6 Summary

### Key Findings

- Canada needs new sources of talent to enter the labour force to maintain its high living standards. Between 2018 and 2040, 11.8 million people will leave Canadian schools and become workers, far short of the 13.4 million workers exiting the labour force. Along with immigration, the Indigenous labour market is viewed as a partial solution to the future labour shortages.
- The gap between the employment, participation and unemployment rates between Indigenous and non-Indigenous people is narrowing. The growth in the employment participation rate and the employment rate between 2014 and 2019 was higher for Indigenous British Columbians (6%, 8%) compared to non-Indigenous British Columbians (4%, 4%). The unemployment rate for Indigenous British Columbians has declined by from 13% in 2014 to 8% in 2019. This change is larger than the decline for non-Indigenous British Columbians, 6% in 2014 to 5% in 2019.
- Indigenous British Columbians continue to have a lower income than non-Indigenous British Columbians. There is still a persistent gap in annual and hourly income between Indigenous and non-Indigenous British Columbians. The data suggest that the narrowing yet persistent gap in income between non-Indigenous and Indigenous peoples may in part be due to the concentration of Indigenous peoples in lower-paying occupational categories.<sup>70</sup>
- Fewer Indigenous British Columbia are self-employed (11%) than non-Indigenous British Columbians (18%).
- A gap exists between Indigenous and non-Indigenous people when it comes to finishing high school and obtaining post-secondary education. In 2016, a much higher proportion of BC's non-Indigenous population had some post-secondary education (57%, including 26% who had a University certificate, diploma or degree) compared to the Indigenous population (40%).
- Barriers to Indigenous employment include, the perception of shortage of jobs available, racism, discrimination and social exclusion, recruitment difficulties, literacy, skills education, technical, job-related skills, professional qualifications, work experience, cultural differences (including language), self-esteem, poverty and poor housing, lack of driver's license, lack of transportation, childcare, lack of career planning and knowledge of where to work for a job, family structure, living in rural / remote areas and business labour policy.
- The Indigenous workforce could benefit from:
  - Culturally accessible and safe education and skills training,
  - Access to programs that help identify preferred career choices (career guidance) – this includes high school-based career counselling and professional development programs
  - Access to secure and relevant employment services, especially in urban areas
  - Access to culturally sensitive workplaces
  - Access to work experience programs (especially for young Indigenous people), training and job advancement opportunities
  - Access to mentoring and Indigenous role models
  - Access to childcare programs and transportation to employment sites
  - Access to more contacts / networking, resume writing skills or job finding clubs
- Employer best practices to increase Indigenous retention, engagement and workplace development include:
  - Developing a business recognition of the economic potential in commitments to Indigenous groups

<sup>70</sup> National Indigenous Economic Development Board. 2019. The Indigenous Economic Progress Report 2019. <http://www.naedb-cndea.com/wp-content/uploads/2019/06/NIEDB-2019-Indigenous-Economic-Progress-Report.pdf>

- Participation in training a pool of qualified Indigenous workers
- Providing mentorship and career bridging programs, develop Indigenous-friendly workplace programs and or policies
- Participating in training a pool of qualified Indigenous workers
- Providing mentorship and career bridging programs
- Develop Indigenous-friendly workplace programs and / or policies
- Deliver community-based and engaging programing for diverse learning styles
- Engage in stronger collaboration and coordination among stakeholder with a focus on long-term partnerships
- Benefit from guidance in human resource management, and establish and implement policies for recruiting, integrating and retaining Indigenous workers
- Offer competitive compensation and benefits
- Provide time for Indigenous workers to participate in seasonal or traditional activities
- There is the potential for better engagement of Canadian businesses with Indigenous communities. National research suggests that businesses have low awareness of opportunities to partner with Indigenous communities, they lack strategy for how to do so, they do very little consultation with Indigenous communications and do not prioritize actions to engage with Indigenous communities. Businesses with full partnerships, geared towards both business and community goals, reported they are hiring more Indigenous people, doing more business in their communities, and seeing their reputations grow.
- There is evidence that the hospitality sector 'sees' the labour solution of working with Indigenous groups yet has not acted and do not understand how to act. The retail sector is reactive and is most motivated in working with Indigenous groups and people.
- In BC, 20+ community-based organizations provide Indigenous Skills and Employment Training Strategy programs and services.
- Most BC post-secondary institutions have Indigenous service plans, it would be worthwhile to investigate the plans for tourism-specific programs.

### Challenges

- Continue to improve the participation, employment rate, income and education attainment of Indigenous British Columbians.
- Overcome the lack of awareness of non-Indigenous businesses about the power of relationships with Indigenous communities.
- Overcome barriers to Indigenous employment in the tourism industry by developing businesses that are culturally sensitive and meet the needs of the Indigenous workforce. At the same time, improve the confidence, skills and training, and lack of awareness about available tourism jobs in the Indigenous workforce

### Opportunities

- Overcome Indigenous people barriers to finding employment in the tourism industry and too better connect rural BC tourism businesses with the rural Indigenous workforce.
- Grow the number of self-employed Indigenous British Columbians, especially in the tourism industry.
- Investigate the outcomes of Indigenous students who participate in post-secondary tourism programs.

- Better understand training needs of Indigenous tourism businesses and Indigenous cultural tourism businesses and align those needs with post-secondary education programs.
- Engage the 20+ local Indigenous Skills and Employment Training Strategy in Indigenous tourism workforce development.
- Document and broadly share the power of successful non-Indigenous business and Indigenous community partnerships related to tourism.
- Share information with non-Indigenous tourism businesses about how to engage with Indigenous communities and workforce. Further, there is an opportunity to promote Indigenous groups ready for partnership and facilitate business-to-business mentorship in the tourism sector.

## 5 INDIGENOUS TOURISM LABOUR MARKET

### 5.1 Demand for Indigenous Tourism

The global demand for Indigenous tourism experience is growing. This is not only true in Canada, but in Australia and New Zealand as well.

*“Australia's Indigenous culture is a key point of differentiation in today's highly competitive international tourism market. The latest data from Tourism Research Australia shows more people than ever are choosing to experience the beauty and splendour of the world's oldest continuous culture.”<sup>71</sup>*

*“Experiencing New Zealand's unique Māori culture is an important part of the international visitor experience. The number, variety and quality of Māori tourism businesses has increased dramatically over the past few years and the sector now makes an important contribution to New Zealand's regional economies.”<sup>72</sup>*

Canada and British Columbia continues to exceed expectations as more international visitors seek authentic experiences. The Destination Canada Global Tourism Watch (GTW) series of market studies identified examined trip activity interest, participation and activities that anchor (or motivate) trips. For each market, the term ‘Exploring Aboriginal Culture and Traditions’ was used to study Indigenous tourism. Results indicate that.

- 1 in 3 international visitors to Canada are interested in Indigenous tourism experiences (37%),
- The interest, participation and those motivated to take by Indigenous tourism differ by market,
- Analysis of past visitors to Canada revealed there is a high incidence of participation in Indigenous visitors from France, Germany, India, Mexico and China,
- Visitors from France (63%) and Germany (47%) are most likely to be interested in Indigenous tourism experiences, and
- The USA (33%) and China (35%) offer the largest potential market opportunities in terms of potential visitation.

There are gaps in the proportion of people interested in participating in Indigenous cultural activities and those that participated in Indigenous activities while in Canada. These gaps indicate there is room for further development of Indigenous tourism experiences.

- These gaps are largest in the United States, France, Australia, Japan and South Korea.
- The participation gaps are average (no greater than other activities) in China, Germany, Mexico and the United Kingdom.

As a motivating activity is highest in France (38%), Germany (24%), Mexico (20%), China (18%), and South Korea (18%). Indigenous tourism as a motivating activity is lower in the United States (11%) and domestic markets (9%, Figure 29).

<sup>71</sup> Department of Foreign Affairs and Trade. Australian Government. 2020. Indigenous Tourism Surge. <https://www.dfat.gov.au/about-us/publications/trade-investment/business-envoy/Pages/january-2019/Indigenous-tourism-surge>

<sup>72</sup> Tourism New Zealand. 2017. About the Tourism Industry. <https://www.tourismnewzealand.com/about/about-the-tourism-industry/m%C4%81ori-tourism/>

Like most tourism sectors, Indigenous tourism depends to a large extent on the momentum of market forces beyond its control to deliver consumers to its destinations. While interest in Indigenous tourism remains strong at the international level, limited awareness of such opportunities in BC remains relatively challenging.

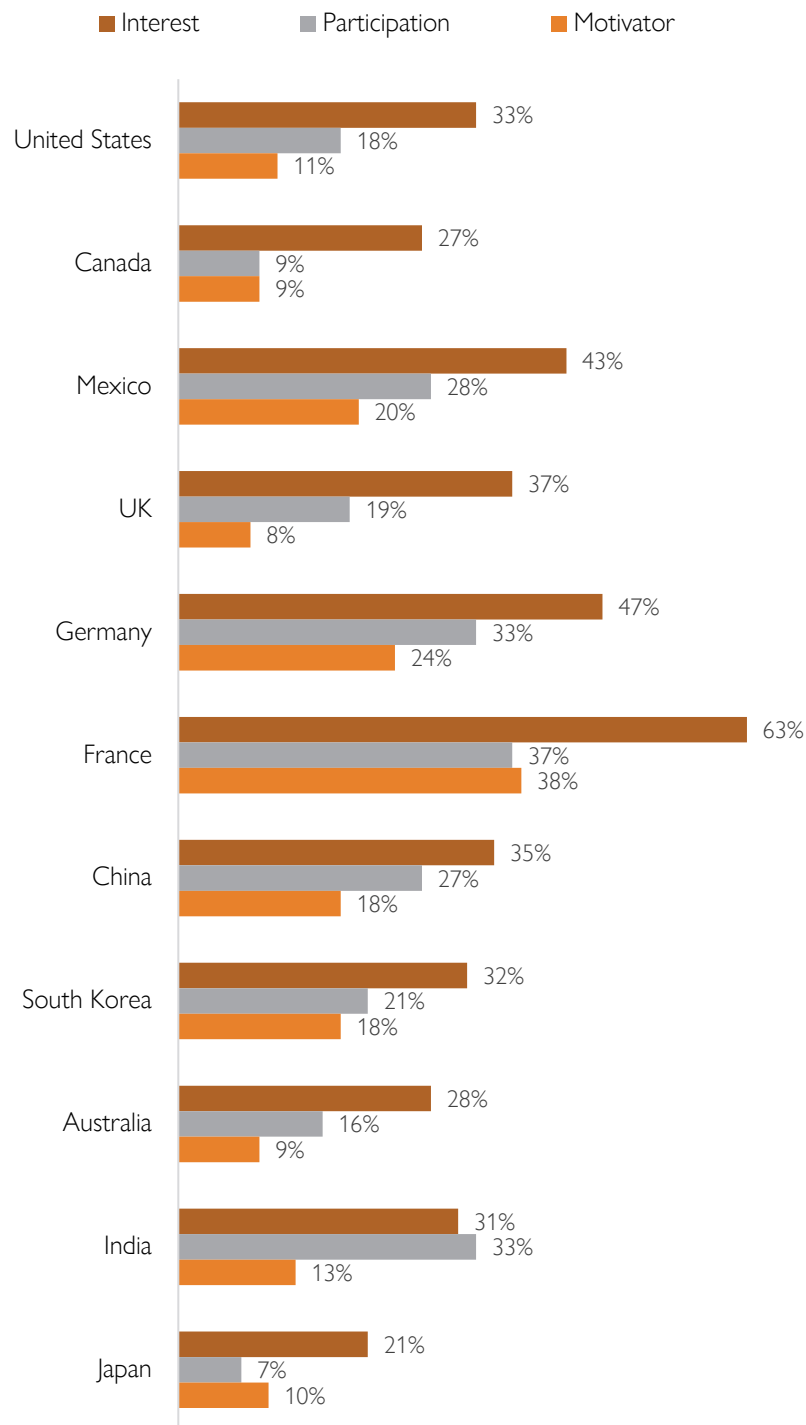
In 2014, Destination BC published a Cultural Tourism Sector Profile.<sup>73</sup> Although dated, this information is presented here due to lack of detailed information about Indigenous Tourism visitors, highlights include:

- Visitors who participate in Indigenous cultural tourism often spend more per trip than other types of visitors and often stay longer,
- The average Indigenous cultural tourism visitor to BC tends to be female, middle to late aged, well-educated, and earns an upper-middle income,
- An Indigenous cultural tourism visitor often includes an Indigenous cultural tourism product or activity in their first visit to BC,
- Visitors tend to stay in BC for an average of 13 days, with parts of 3 days participating in Indigenous cultural tourism experiences. Visitors who participate in Indigenous cultural tourism spend more per trip than other visitors, and stay longer, and
- Indigenous cultural tourism visitors under the age of 50 prefer active experiences such as canoeing, kayaking, dogsledding, and horseback riding, while visitors aged 50+ prefer less vigorous experiences such as hiking, walks, nature observation, and indoor activities.

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<sup>73</sup> Destination BC. Research, Planning and Evaluation. 2014. Tourism Sector Profile: Aboriginal Cultural Tourism. The original research that this summary relies was conducted for the 2005 Aboriginal Blueprint Strategy. <https://www.destinationbc.ca/research-insights/type/activity-research/Indigenous/aboriginal-cultural-tourism-sector-profile-2014/>

Figure 29: Interest, Participation and Motivation for  
“Aboriginal Culture and Traditions’ While on Vacation 2017



Destination Canada's 2017 Global Tourism Watch Studies, <https://www.destinationcanada.com/en/global-tourism-watch>

“The Next Phase” Strategy Performance Audit 2012-2017<sup>74</sup> summarized incidence rates and estimated the number of Indigenous tourism visitor arrivals in British Columbia (Figure 30). Consumer interest in Indigenous tourism experiences stayed stable in Canada’s key markets. Indigenous tourism incidence rates were estimated by market at: domestic visitors (13%), US (17%), Asia Pacific (34%), Europe (30%) and other international (38%). The number of overnight visits to British Columbia, which included some form of Indigenous cultural tourism, increased by an estimated 27% between 2013 and 2016 to approximately 3.6 million visits, almost double the 2006 level.

Figure 30: Indigenous Tourism Arrivals in British Columbia 2013 and 2016

Market	BC* Arrivals (000s) 2013*	Indigenous Arrivals (000s) 2013***	BC Arrivals (000s) 2016*	Indigenous Arrivals (000s) 2016*	Indigenous Overnight Arrivals % Change 2013-2016
US	2,741	466	3,621	616	32
Asia Pacific	760	258.4	1,201	408	58
Europe	573	171.9	536	160.8	-6
Other International	138	52.44	175	66.5	27
<b>Total International</b>	<b>4,350</b>	<b>949</b>	<b>5,533</b>	<b>1,251</b>	<b>32</b>
<b>Domestic</b>	<b>14,683</b>	<b>1,909</b>	<b>18,204</b>	<b>2,366</b>	<b>24</b>
<b>Total BC Arrivals</b>	<b>19,033</b>	<b>2,858</b>	<b>23,737</b>	<b>3,618</b>	<b>27</b>

\*Customized Domestic and International data (2014 to 2015) provided by Destination BC, 2017.

\*\*2016 International estimates based on Destination BC data. Estimated domestic arrival data for 2016 based on average ratio of domestic to international arrival data 2013-2015.

\*\*\*Based on Indigenous incidence rates of: US (17%); Asia Pacific (34%) and Europe 30%); Other international (38%), and domestic (13%).

## 5.2 Indigenous Tourism Businesses

Growing demand for Indigenous tourism experiences has accelerated the emergence and/or expansion of Indigenous tourism businesses between 2012 and 2017 (Figure 31).

In early 2018, ITBC commissioned a performance audit of the ‘Next Phase 2012-2017’.<sup>75</sup> The audit revealed more detail about Indigenous tourism businesses:

- In 2017, there were about 401 Indigenous tourism businesses in British Columbia, up 122% from 2003. The business count includes only those that are majority Indigenous owned and whose primary business type is tourism.
- Since 2003, Northern BC and the Thompson Okanagan had over 200% growth while the Cariboo Chilcotin Coast grew by 186% while growth in the Vancouver Coast and Mountains (88%) and on Vancouver Island (62%) were slightly less. These statistics include substantial growth in Northern BC gas stations (classified as retail).
- In 2017, most Indigenous tourism businesses were retail (36%) followed by 19% in outdoor recreation, 17% accommodations and 13% attractions.
- In 2017, ITBC reported 90 market-ready businesses (tier 3).<sup>76</sup>

<sup>74</sup> O’Neil Marketing and Consulting. 2018. AtBC “The Next Phase” Tourism Performance Audit Report 2012-2017. For Indigenous Tourism British Columbia. [https://www.Indigenoustourismbc.com/drive/uploads/2018/10/REPORT-ITBC-Audit-2012-2017\\_FINAL.pdf](https://www.Indigenoustourismbc.com/drive/uploads/2018/10/REPORT-ITBC-Audit-2012-2017_FINAL.pdf)

<sup>75</sup> O’Neil Marketing and Consulting. 2018. AtBC “The Next Phase” Tourism Performance Audit Report 2012-2017. For Indigenous Tourism British Columbia.

<sup>76</sup> O’Neil Marketing and Consulting. 2018. AtBC “The Next Phase” Tourism Performance Audit Report 2012-2017. For Indigenous Tourism British Columbia.

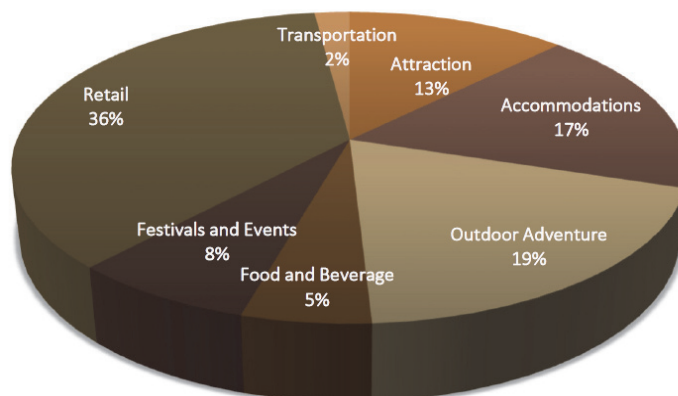
Figure 31: Indigenous Tourism Business Regional Distribution 2017

BC Indigenous Tourism Businesses by Year and Tourism Region												
Tourism Region	2017		2014		2013		2011		2003		Change since 2003	
Vancouver Coast and Mountains	79	17%	60	20%	48	20%	54	22%	42	20%	37	88%
Vancouver Island	89	20%	76	25%	62	26%	72	29%	55	26%	34	62%
Cariboo Chilcotin Coast	40	9%	25	8%	21	9%	25	10%	14	7%	26	186%
Thompson Okanagan	72	16%	43	14%	31	13%	33	13%	24	11%	48	200%
Kootenay Rockies	16	4%	14	5%	12	5%	12	5%	15	7%	1	7%
Northern British Columbia	105	23%	49	16%	38	16%	36	14%	31	14%	74	239%
TOTAL...	401	100%	267	100%	212	100%	232	100%	181	100%	220	122%

Source: Indigenous Tourism BC 2018. "The Next Phase" Strategy Performance Audit 2012-2017. O'Neil Marketing and Consulting. Beverley O'Neil and Dr. Peter Williams.

In 2017, of all the Indigenous tourism businesses in BC, 36% of them were retail (145) (most were gas stations), 19% were outdoor adventure (77), 17% were accommodations (70), and 13% attractions (50, Figure 32).

Figure 32: Indigenous Tourism Business by Type 2017



Source: "Indigenous Tourism BC "The Next Phase" Strategy Performance Audit 2012-2017. O'Neil Marketing and Consulting. Beverley O'Neil and Dr. Peter Williams.

### 5.3 Indigenous Tourism Employment

Tourism HR Canada has provided 2016 Census data that describes Indigenous employment in the tourism industry in BC and Canada. There are 75,160 Indigenous people working in the tourism industry throughout Canada. This is about 4% of the tourism labour force in 2016 which was up from 3% in 2011.

In total, there was 15,840 Indigenous people working in the tourism sector in BC in 2016, which represents about 21% of Canadian Indigenous tourism employment in Canada.<sup>77</sup> BC has the second largest Indigenous tourism workforce in Canada, just behind Ontario (Figure 33).

In BC, Indigenous people constitute about 5.2% of the tourism workforce up from 4.2% in 2011. The share of Indigenous people in the tourism workforce is larger in Saskatchewan (13.1%) and Manitoba (12.8%), like BC both have increased their share from 2011.

In BC, the Indigenous tourism workforce tends to be female and younger (<35 years old) compared to the non-Indigenous tourism workforce (Figure 34). In fact, 58% of Indigenous people working in the tourism industry are female compared to 50% of non-Indigenous people. A total of 62% of Indigenous employees are under 35 while 33% of non-Indigenous employees are under 35. This age pattern reflects the overall age distribution of the Indigenous population in BC (Figure 30).

For all occupations (not just the tourism sector), 72% of Indigenous people work full-time while 24% work part-time. In the tourism sector, about 56% of Indigenous people work full-time while 37% work part-time. More Indigenous people work part-time (37%) compared to non-Indigenous people (32%).

A larger share of Indigenous British Columbians work in accommodations (6%) and food and beverage services (6%), 5% work in recreation and entertainment, while fewer work in transportation (4%) and in travel services (2%). More Indigenous people work in transportation (82%) and travel services (79%) full-time compared to those in the accommodation (65%), recreation and entertainment (60%), and food and beverage (47%) sectors.

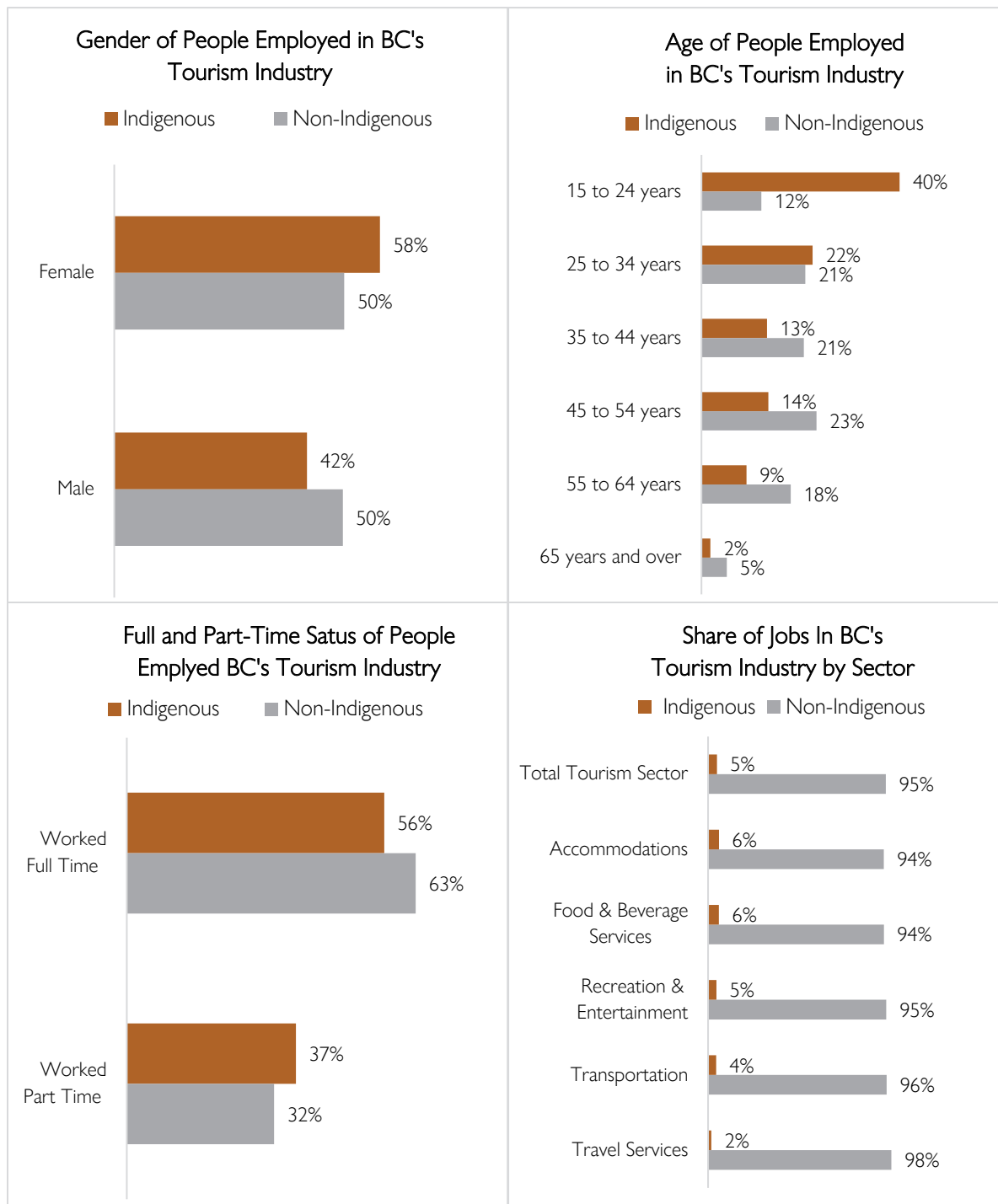
Figure 33: Indigenous Tourism Workforce Regional Distribution 2016

	2016 Indigenous Tourism Workforce	Share of Provincial Tourism Labour Force	
		2016	2011
<b>Canada</b>	75,160	4.1%	3.1%
Ontario	19,485	2.8%	2.2%
BC	15,840	5.2%	4.2%
Alberta	10,905	5.1%	4.8%
Saskatchewan	6,500	13.1%	12.5%
Manitoba	8,025	12.8%	11.7%
Quebec	7,570	1.9%	1.5%

Source: Tourism HR Canada. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

<sup>77</sup> This is the proportion of Indigenous people that are allocated to tourism from the list of tourism occupations in BC.

Figure 34: Characteristics of the BC Tourism Workforce 2016



Source: Tourism HR Canada. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

The data provided by Tourism HR Canada also allows a deeper look at specific occupations that Indigenous people occupy within the tourism industry. In terms of volume, the top occupations that Indigenous people are working in are in food counter attendants, kitchen helpers, and related support workers (23%), followed by cooks (16%), food and beverage servers (15%), light duty cleaners (5%) and restaurant and food service managers (4%, Figure 35).

The *Indigenous people share*<sup>78</sup> in each occupation tells us the kinds of tourism jobs that Indigenous people are more likely to be in (choose) compared to non-Indigenous people. The five occupations with the highest Indigenous people share are bakers (9%), ground and water transport ticket agents, cargo service representatives and related clerks (9%), light duty cleaners (8%), cooks (8%) and technical occupations related to museums and art galleries (8%, Figure 36).

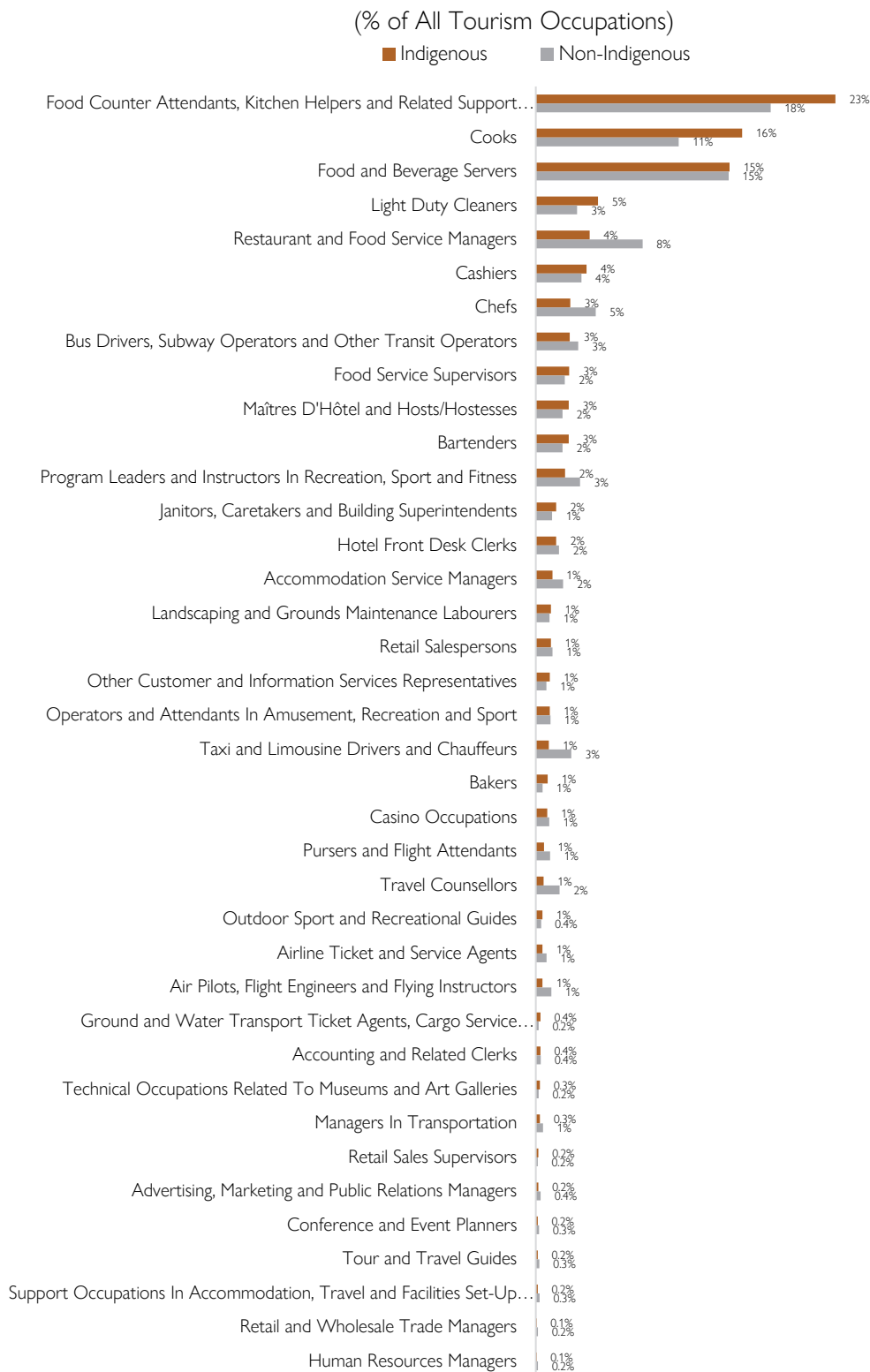
The tourism jobs where the Indigenous people share is the lowest tells us which occupations Indigenous people are under-represented. The five tourism occupations with the lowest Indigenous people share are retail and wholesale trade managers (3%), human resources managers (3%), air pilots, flight engineers and flying instructors (2%), taxi and limousine drivers and chauffeurs (2%) and travel counsellors (2%, Figure 36).

Tourism occupations for Indigenous people differ by age. Younger Indigenous people (<35 years old) are most likely to be employed as a food counter attendants, kitchen helpers, and related support workers (30%), cook (17%), food and beverage server (17%), cashier (5%) and a maitres d'hotel and host / hostess (4%, Figure 37). Younger Indigenous people have a lower likelihood of employment than non-Indigenous people in occupations such as a food and beverage server (17%), restaurant and food manager (3%), program leaders and instructors in recreation, sport and fitness (2%) and bartenders (2%). Occupations that the Indigenous people share is highest for young people are bakers (13%), retail supervisors (12%), light duty cleaners (11%), retail and wholesale trade managers (11%) and tour and travel guides (11%, Figure 39).

Older Indigenous people (>35 years old) are most likely to be cooks (14%), food and beverage servers (11%), food counter attendants, kitchen helpers, and related support workers (9%), light duty cleaners (9%) and bus drivers, subway operators and other transit operators (8%, Figure 38). Older Indigenous people have a lower likelihood of employment than non-Indigenous people in occupations such as restaurant and food service manager (12%), taxi and limousine drivers and chauffeurs (3%), chefs (3%), program leaders and instructors in recreation, sport and fitness (3%) and travel counsellors (3%). Occupations that the Indigenous people share is highest for older people are water transport ticket agents, cargo service representatives and related clerks (10%), other customer service, and information representatives (9%), bartenders (7%), operators and attendants in amusement, recreation and sport (7%), light duty cleaners (6%) and janitors, caretakers and building superintendents (6%, Figure 39).

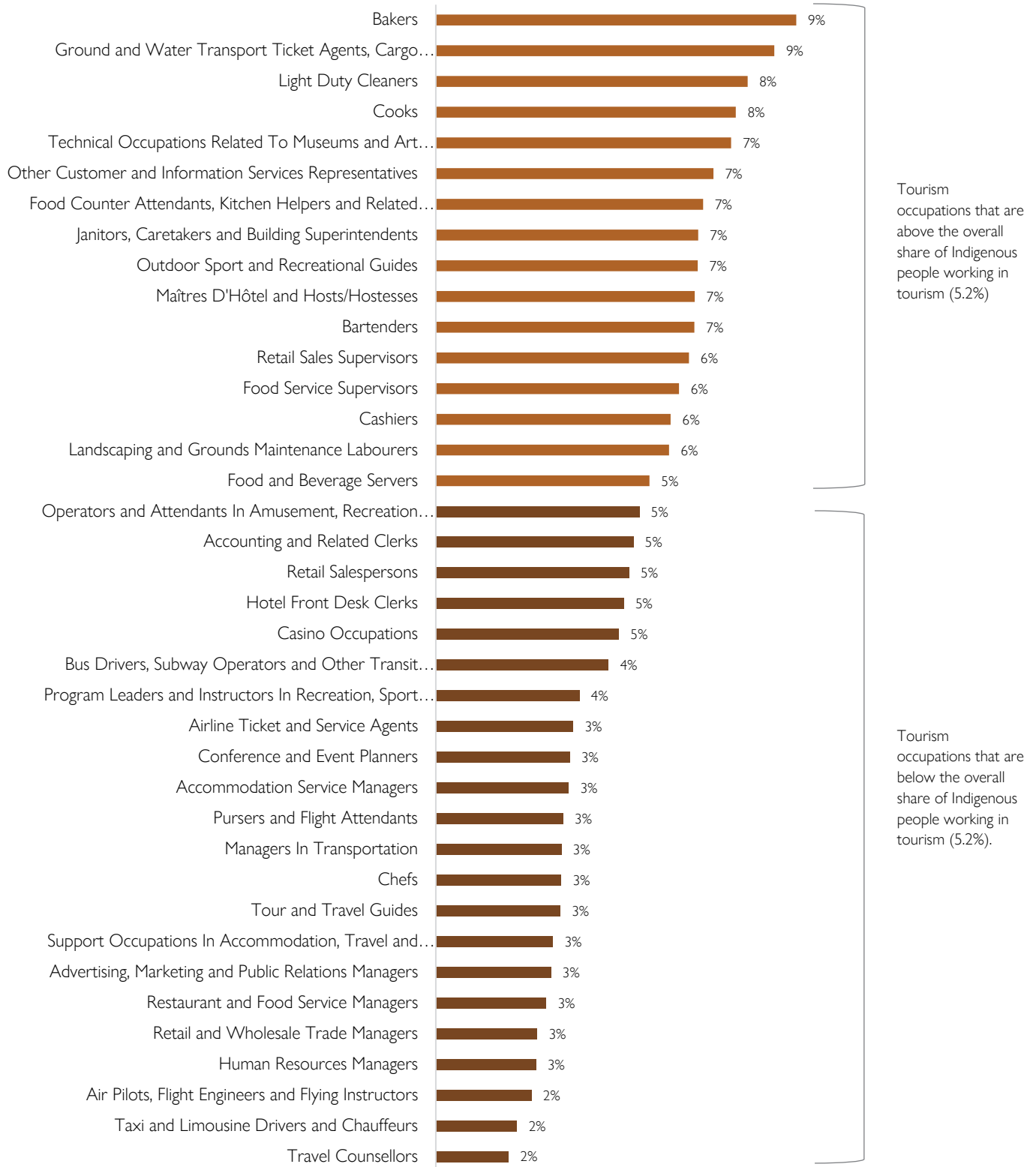
<sup>78</sup> The Indigenous people share is the number of Indigenous people divided by the total number of people in each occupation.

Figure 35: Distribution of Indigenous and Non-Indigenous Employment by Tourism Occupation, British Columbia 2016



Source: Tourism HR Canada. 2020. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

Figure 36: Indigenous People Share of Tourism Occupations in British Columbia 2016



Source: Tourism HR Canada. 2020. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

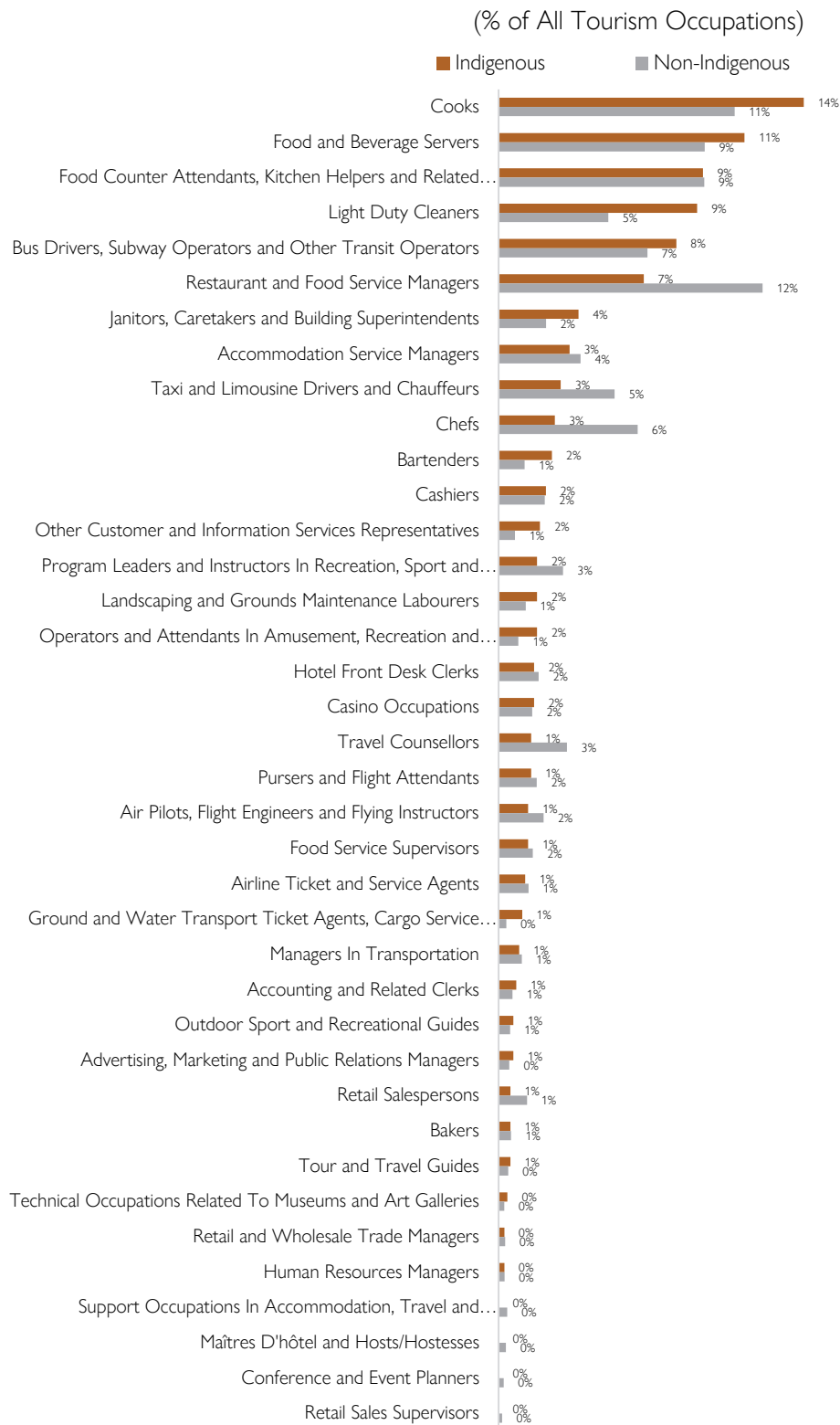
Note: The Indigenous people share is the number of Indigenous people divided by the total number of people in each occupation.

Figure 37: Distribution of Indigenous and Non-Indigenous Employment by Tourism Occupation, for Young People (Under 35), British Columbia 2016



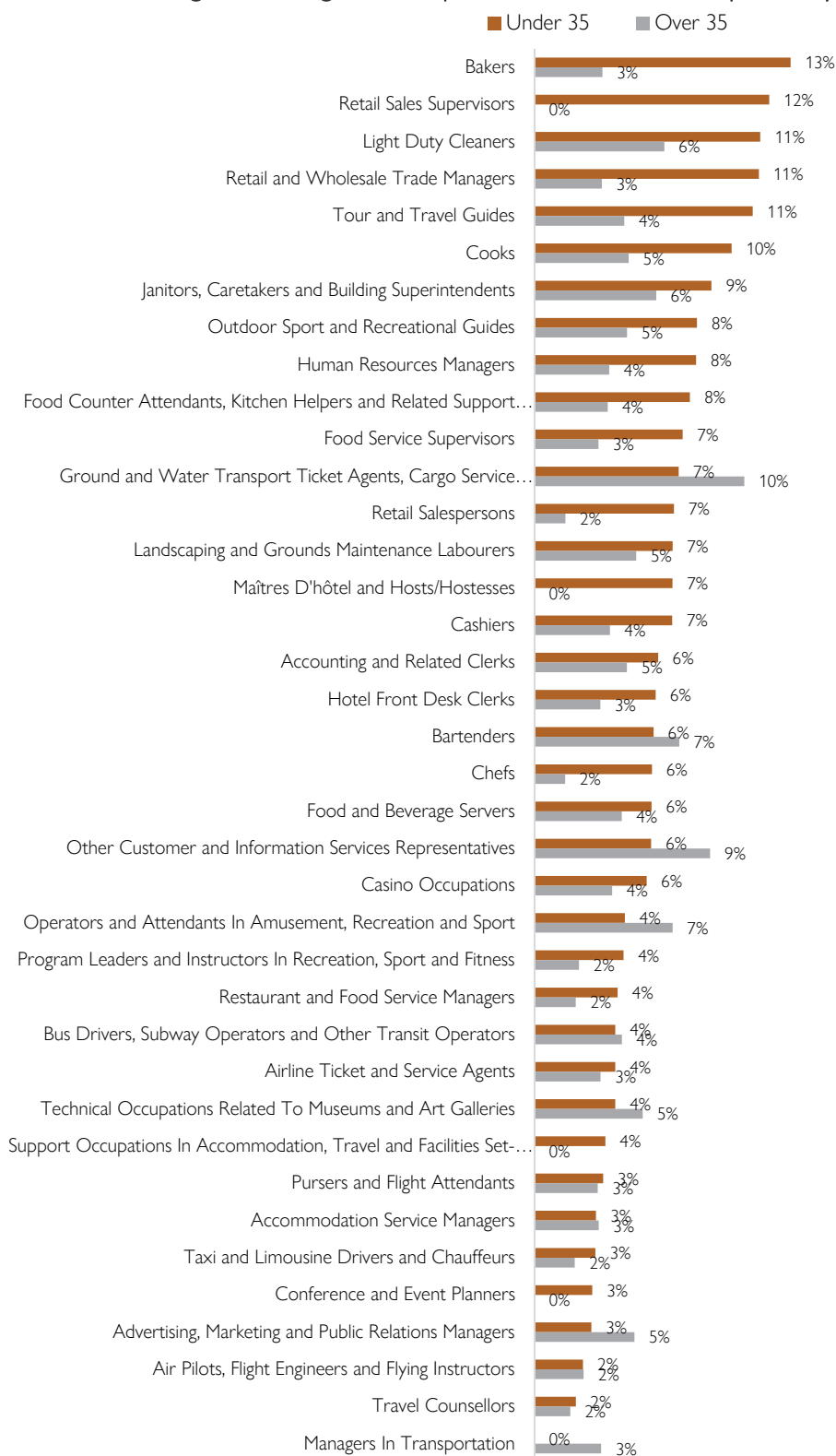
Source: Tourism HR Canada. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

Figure 38: Distribution of Indigenous and Non-Indigenous Employment by Tourism Occupations, for Older People (Over 35), British Columbia 2016



Source: Tourism HR Canada. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

Figure 39: Indigenous People Share of Tourism Occupations by Age 2016



Source: Tourism HR Canada. 2020. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

Note: The Indigenous people share is the number of Indigenous people divided by the total number of people in each occupation.

Indigenous people that work in the tourism industry are more likely to be women. In 2019 the World Travel & Tourism Council identified that the female share in Travel and Tourism's employment is greater than that of the overall economy that Travel and Tourism provides great opportunities for women's employment.<sup>79</sup> The policies best aimed at increasing women's employment in Travel and Tourism are those that support employment in the sector by encouraging women to join the labour force and by addressing inequalities at the workplace. The most effective policies are those that:

- Improve women's access to better quality jobs and promote equal access to opportunities
- Promote women's education and training
- Ensure women earn the same as men for equivalent work and commit to reduce the gender pay gap
- Promote women's leadership
- Provide attractive childcare, tax, social benefits, maternity protection, and incentives to return to work
- Increase flexible work arrangements
- Combat unconscious bias
- Inform / educate employers about the benefits of employing women
- Promote women's entrepreneurship and facilitate the equal access to start-up grants

## 5.4 Other Indigenous Tourism Labour Market Initiatives

### 5.4.1 Canada

The Indigenous tourism industry is in varying stages of development in provinces across Canada. Some provinces have developed Indigenous Tourism Associations (e.g., Alberta, Quebec, Newfoundland and Labrador) while some are in the process of development and supported by the Indigenous Tourism Association of Canada (e.g., Manitoba, Saskatchewan). Varying stages of development brings differing levels of attention to labour, workforce and training initiatives related to Indigenous tourism.

No Canadian provinces have strategies centered around their Indigenous Tourism Labour Market. Although, most provincial Indigenous tourism initiatives include training and capacity development (Figure 40).

Recently, Canadian Ecotourism Services developed a report for Indigenous Tourism Ontario, entitled *Ontario's Indigenous Tourism Landscape Foundational Research Study 2019*. In that report, an Indigenous tourism jurisdiction scan was conducted where key initiatives were summarized for each province in Canada. Below, the training and capacity building initiatives are summarized from that report along with more recent Indigenous tourism strategies for Alberta, Manitoba and Newfoundland and Labrador.

Key findings include:

- There is a range of Indigenous tourism training and capacity building initiatives across Canada
- Most of the training and capacity development activities were developed for businesses to enhance visitor experiences and marketplace readiness
- Some provinces offer programs specifically for youth
- Some provinces have identified that engaging in partnerships and participating in existing labour market and business development programs are first steps

<sup>79</sup> World Travel & Tourism Council. 2019. Travel & Tourism: Driving Women's Success.

- Some provinces have focused on supporting training initiatives around customer service training activities, wilderness guides and boat operator training
- Some provinces have identified the need to enhance leadership training and business development initiatives

Figure 40: Provincial Indigenous Tourism Strategy Initiatives Related to Training and Capacity Building

Province	Organization	Training and Capacity Building
Alberta <sup>1</sup>	Indigenous Tourism Alberta (ITA)	Indigenous Tourism Strategy 2019-2024. 1. Develop and deliver Indigenous Tourism Readiness Guide and workshops to assist the development and enhancement of Indigenous tourism experiences. 2. Support the supply of leadership and business skills and labour to enhance visitor experiences through quality service, hospitality, and cultural protocols.
Saskatchewan <sup>2</sup> 4	Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)	1. A full Indigenous tourism strategy is under development. 2. As Indigenous tourism development is in its early stages in Saskatchewan, the focus of marketing activities is centred upon creating strong partnerships that will help to promote Indigenous operators, businesses, products, services and experiences.
Manitoba <sup>3</sup>	Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)	Indigenous Tourism Strategy 2019 -2022. 1. Identify supporting partners and programs to provide Indigenous Entrepreneurs access to funding and training opportunities, including business operations and management, human resources, financial, and marketing skills. 2. Identify training partners and programs to improve product knowledge and customer service skills for Front-line Indigenous tourism employees.
Quebec <sup>2</sup>	Quebec Aboriginal Tourism (QAT) including Eeyou Istchee Tourism (EIT) Cree Outfitting and Tourism Association (COTA)	1. QAT provides workforce professionalism guidance for nature and adventure tourism, and for Indigenous outfitting businesses. They also offer up to \$10,000 per applicant to assist with product development, marketing, etc. 2. QAT also provides online mentoring for youth and has offered a Nature and Adventure Training Course. 3. COTA offers regular training programs such as: a recent 5-day Cree Entrepreneur Bootcamp and one-on-one assistance for entrepreneurs through their Product Development Coaching Program. 4. COTA & EIT provide free online training for individuals to increase front-line employees' tourism-related skills. 5. COTA has also coordinated an 8-hour First Host hospitality workshop in various communities, along with Advanced Wilderness First Aid Training, French language teaching, Food Safety & Hygiene, and the development of Cree Entrepreneur Kits.
Ontario	Indigenous Tourism Ontario 2020.	1. Providing support for communities and entrepreneurs. As part of implementation of the 2020 plan a Cultural Authenticity Program (CAP) supports, recognizes and rewards businesses that offer 'culturally authentic' tourism products. There is very little information about supports provided for business.
New Brunswick <sup>2</sup>	Representative Organization is Metepenagiag Heritage Park	1. The very first Atlantic Indigenous Tourism Summit was held in Moncton New Brunswick in May 2019. 2. In 2018, ITAC hosted a Best Practice Mission to Wendake, Quebec with the Province of New Brunswick, the Atlantic Canada Opportunities Agency and Indigenous representatives.
Nova Scotia <sup>2</sup>	Nova Scotia Indigenous Tourism	For 2019, NSITEN will focus on human resource and board development. They will also support training for Indigenous workers in tourism.

Province	Organization	Training and Capacity Building
	Enterprise Network (NSITEN)	
Newfoundland and Labrador	Newfoundland and Labrador Indigenous Tourism Association	<ol style="list-style-type: none"> <li>1. Indigenous Inclusion <ul style="list-style-type: none"> <li>• Identify 5 Indigenous Tourism Champions and engage them in the areas of training, product development and marketing</li> <li>• Increase Indigenous tourism employment by 50%</li> </ul> </li> <li>2. Education &amp; Awareness <ul style="list-style-type: none"> <li>• Reach a minimum of 50 Indigenous beneficiaries to educate them about the opportunities that tourism can offer</li> <li>• Host a minimum of 3 industry networking opportunities for industry</li> </ul> </li> <li>3. Capacity Building &amp; Training <ul style="list-style-type: none"> <li>• Conduct 2 best practice tours with established or aspiring Indigenous tourism operators</li> <li>• Establish 2 Entrepreneur Incubation Centre</li> <li>• Conduct 5 training programs ranging in length from 2-day workshops to 6-week courses</li> <li>• Conduct or facilitate coaching and mentoring with a minimum of 5 Indigenous youths</li> </ul> </li> </ol>
Prince Edward Island <sup>2</sup>	Representative Organization: Lennox Island First Nation	There are minimal initiatives currently in PEI related to training and capacity building for Indigenous tourism.
Yukon <sup>2</sup>	Yukon First Nations Culture & Tourism Association (YFNCT)	<ol style="list-style-type: none"> <li>1. YFNCT offers skills-based, marketing and product development training for artists and tourism businesses.</li> <li>2. In the spring of 2018, YFNCT hosted 6 First Nations youth who participated in a 4-week wilderness tourism training course.</li> </ol>
Northwest Territories <sup>2</sup>	Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)	The Business, Market and Trade Ready (BMT) program offered by the Government of Northwest Territories prepares tourism operators to access new marketing and distribution sales channels.
Nunavut <sup>2</sup>	Regional Coordination under the Indigenous Tourism Association of Canada (ITAC)	<ol style="list-style-type: none"> <li>1. Travel Nunavut is promoting Wilderness First Aid and Small Vessel Operators Proficiency training.</li> <li>2. In early 2016 Travel Nunavut printed several of their business resources, such as the Product Development Workbook, Business Aftercare Guide, and Market and Trade Ready Standards program.</li> </ol>

Sources:

1. Indigenous Tourism Alberta. 2018. Indigenous Tourism Alberta Strategy 2019 – 2024. <https://Indigenoustourismalberta.ca/wp-content/uploads/2019/02/ITA-Strategy-2019-2024-FINAL-EDIT-1.pdf>.
2. Canadian Ecotourism Services. 2019. Ontario's Indigenous Tourism Landscape Foundational Research Study 2019 <https://Indigenoustourismontario.ca/wp-content/uploads/2019/03/ITO-Foundational-Research-Study-2019.pdf>
3. Indigenous Tourism Association of Canada. 2018. Manitoba Indigenous Tourism Strategy 2019-2024. [https://Indigenoustourism.ca/corporate/wp-content/uploads/2019/04/MB-Indigenous-Tourism-Strategy\\_2019-2024\\_REVISED.pdf](https://Indigenoustourism.ca/corporate/wp-content/uploads/2019/04/MB-Indigenous-Tourism-Strategy_2019-2024_REVISED.pdf)
4. Indigenous Tourism Association of Canada. 2019. Saskatchewan's Indigenous Tourism Strategy. <https://Indigenoustourism.ca/corporate/itac-paves-way-for-the-development-of-saskatchewan-indigenous-tourism-strategy/>
5. Indigenous Tourism Ontario 2015. 2020 Investing in Our Future. <https://Indigenoustourismontario.ca/wp-content/uploads/2018/10/Final-ITO-Strategy-Interactive.pdf>
6. Newfoundland & Labrador Indigenous Tourism Association. 2020. 5 Year Strategy. <https://www.nlita.net/about>

## 5.4.2 International

### Australia<sup>80</sup>

The Australian Trade and Investment Commission (Austrade) is the Australian Government's international trade promotion and investment attraction agency. With Tourism Australia, they developed a *Tourism 2020* growth framework. The framework identified an Indigenous Tourism Group (ITG) which focuses on ways to increase the quality and quantity of Australia's Indigenous tourism product offering, and the participation of Indigenous Australians in the tourism industry.

The key deliverables of the ITG include:

- Facilitating an increase in Indigenous tourism employment,
- Building capacity of Indigenous tourism businesses,
- Enhancing Indigenous tourism product offerings,
- Guiding policy direction for Indigenous tourism development, and
- Coordinating national projects between relevant government and industry bodies.

The Australian Tourism Ministers have endorsed four priorities for the ITG including meeting unmet demand, addressing remote supply, product development and market development. Also, there is an Indigenous Tourism Champions Program (ITCP) which is a collaborative national program instigated by Tourism Australia and Indigenous Business Australia (IBA). The program is building reliability and consistent quality in service delivery for Indigenous tourism product. The ITCP is achieving this through selective marketing of product which has met stringent criteria, ensuring that the businesses being promoted are able to meet the needs and expectations of trade and the international market. Program oversight is provided by a sub-group of the ITG.

The Australian tourism team is working with Tourism Australia on a new long-term tourism strategy (2030).

### New Zealand<sup>81</sup>

Similar to BC, Indigenous tourism in New Zealand is growing. Implementation of the *NZ Māori Tourism Strategic Plan 2016-2019* has contributed to the Māori tourism earnings increase from \$0.5 billion to \$1.97 billion.

In 2019, the New Zealand Māori Tourism organization has focused building quality and capacity, their regions, branding and promotions and leveraging tourism and trade. The building quality and capacity initiatives have focused on building careers in tourism, strengthening Māori businesses and helping to build new and innovative tourism businesses. These include:

- **Workshops** – The workshops focused on building careers in tourism, strengthening Māori businesses and helping to build new and innovative tourism businesses.
- **Dragon's Den** – The inaugural tourism Dragons' Den provided existing and new Māori tourism operators the opportunity to pitch for investment. There were four categories: bring your idea to life; small Māori tourism business with a big idea; innovate for success; and, China New Zealand Year of Tourism.

<sup>80</sup> Australian Trade and Investment Commission. 2020. Tourism Policy and Strategy Indigenous Tourism Working Group. <https://www.austrade.gov.au/Australian/Tourism/Policy-and-Strategy/Tourism-2020/Working-Groups/Indigenous-tourism>

<sup>81</sup> New Zealand Maori Tourism. 2019. Annual Report 2019. <https://maoritourism.co.nz/sites/default/files/J066464%20NZMT%202019%20Annual%20Report%20WEB%20NO%20FINANCIALS.pdf>

## 5.5 Summary

This section summarizes key findings, challenges and opportunities for the Indigenous Tourism labour market in BC.

### Key Findings

Key findings in this chapter include:

- The number of Indigenous tourism businesses together with the size of the Indigenous tourism workforce has continually increased since 2011.
- BC has the second largest Indigenous tourism workforce in Canada, just behind Ontario.
- In BC, the Indigenous tourism workforce tends to be female and younger (<35 years old) compared to the non-Indigenous tourism workforce.
- About 56% of Indigenous people worked full-time while 37% worked part-time. More Indigenous people worked part-time (37%) compared to non-Indigenous people (32%).
- A larger share of Indigenous British Columbians work in accommodations (6%) and food and beverage services (6%), 5% work in recreation and entertainment, while fewer work in transportation (4%) and in travel services (2%).
  - In terms of volume, the top occupations that Indigenous people are working in are in food counter attendants, kitchen helpers, and related support workers (23%), followed by cooks (16%), food and beverage servers (15%), light duty cleaners (5%) and restaurant and food service managers (4%).
  - The Indigenous people share in each occupation tells us the kinds of tourism jobs that Indigenous people are likely to choose. Overall, the five occupations with the highest Indigenous people share are bakers (9%), ground and water transport ticket agents, cargo service representatives and related clerks (9%), light duty cleaners (8%), cooks (8%) and technical occupations related to museums and art galleries (8%).
  - The tourism jobs where the Indigenous people share is the lowest tells us which occupations Indigenous people are under-represented. The five tourism occupations with the lowest Indigenous people share are retail and wholesale trade managers (3%), human resources managers (3%), air pilots, flight engineers and flying instructors (2%), taxi and limousine drivers and chauffeurs (2%) and travel counsellors (2%). Overall, Indigenous people are underrepresented in occupations with manager in the title.
  - Tourism occupations for Indigenous people differ by age. Occupations that the Indigenous people share is highest for young people are bakers (13%), retail supervisors (12%), light duty cleaners (11%), retail and wholesale trade managers (11%) and tour and travel guides (11%). Occupations that the Indigenous people share is highest for older people are water transport ticket agents, cargo service representatives and related clerks, other customer service and information representatives (9%), bartenders (7%), operators and attendants in amusement, recreation and sport (7%), light duty cleaners (6%) and janitors, caretakers and building superintendents (6%).

The provincial review of Indigenous tourism strategies revealed that no Canadian provinces have strategies centered around their Indigenous tourism labour market. Although, most provincial Indigenous tourism initiatives include training and capacity development.

- There is a range of Indigenous tourism training and capacity building initiatives across Canada.

- Most of the training and capacity development activities were developed for businesses (and not the workforce) to enhance visitor experiences and marketplace readiness.
- Some provinces offer programs specifically for youth.
- Some provinces have identified that engaging in partnerships and participating in existing labour market and business development programs are first steps.
- Some provinces have focused on supporting training initiatives around customer service training activities, wilderness guides and boat operator training.
- Some provinces have identified the need to enhance leadership training and business development initiatives.
- Australia and New Zealand have both identified that building their Indigenous tourism labour market/employment alongside Indigenous tourism business development as key initiatives in their strategic plans.

## Challenges

Indigenous people tend to occupy lower paying positions in the tourism labour force a challenge is to assist Indigenous tourism workers to move up to more senior roles in tourism businesses.

There are challenges with current national and provincial tourism employment statistics.

- Specifically, the 2016 census data provides details about the Indigenous tourism workforce there are no details related to Indigenous cultural tourism. The sector and occupation codes used by Statistics Canada does not include a cultural identifier. ITBC will have to continue to initiate their own research to measure growth and characteristics of the Indigenous cultural tourism sector and workforce.
- Currently, there is no-readily available Indigenous tourism data from national survey on regional basis.
- The Indigenous Tourism workforce data summarized here is from the 2016 census which is only administered every five years. Annual performance tracking with this data set is impossible. Annual performance indicators will be valuable in the forthcoming labour market strategy; therefore, it will be necessary to investigate and determine if alternative sources of data are available. The Statistics Canada Labour Force Survey is one potential data source.

## Opportunities

- Continue to demonstrate global leadership in Indigenous tourism sector development. As evidenced by this initiative, few tourism destinations within and outside of Canada have initiated focused, detailed work on the Indigenous tourism labour market.
- Optimize the younger Indigenous people demographic by developing tourism labour market strategies tailored to the younger workforce.
- Develop a clear career path for Indigenous people in the tourism industry. This includes knowledge of opportunities in tourism, access to appropriate training, work experience and connections with Indigenous and non-Indigenous businesses. Also, continue education in tourism including enhanced leadership and management training to ensure a clear path to more senior roles in the sector.
- Share success stories of Indigenous tourism leaders and role models with current and future Indigenous tourism workers.
- Continue to utilize partnerships and to participate in existing labour market and business development initiatives already in place.

## 6 KEY FINDINGS

### 6.1 Current Situation

The Conference Board of Canada<sup>82</sup> predicts that due to Canada's aging population and low fertility rate, Canada needs new sources of talent to enter the labour force to maintain its high living standards. Between 2018 and 2040, 11.8 million people will leave Canadian schools and become workers, far short of the current 13.4 million workers exiting the labour force. Along with immigration, the Indigenous labour market is viewed as a partial solution to the future labour shortages.

Tourism is one of the largest and fastest-growing economic sectors in the world and is vitally important to the BC economy. In fact, BC's tourism industry generated revenue of \$18.4 billion in 2017, an increase of +8% from 2016. Since 2007, total tourism revenue has grown +41%.

The BC tourism industry faces many challenges over the next decade. The rapid industry growth, a declining youth population, and the largest number of people in history about to retire and leave the workforce all lead to projected labour market shortages. Many tourism and hospitality businesses in BC have expressed considerable concern about the impacts of labour shortages on their businesses. Over the past decade, the demand for workers in the BC tourism industry started to exceed supply significantly. The demand-supply gap is projected to increase well into the future as development and expansion of world-class product offerings and sustained, focused marketing efforts are projected to stimulate annual revenue growth levels.

In 2019, the tourism and hospitality sector is forecasted to employ about 310,000 people in BC, about 12% of the provincial workforce. From 2019 to 2029, the sector is expected to grow by 108,025 job openings, of which 54% are to replace exiting workers. This provincial growth is at a faster-than-average pace. Regional analysis demonstrates that more than half of growth will be strongest in rural areas of the province including the Northeast, in the Thompson Okanagan and Vancouver Island.

Indigenous tourism is not immune to these challenges. The Indigenous tourism sector is growing at a rapid rate, outpacing the overall tourism sector growth both in BC and for Canada.

In Canada and BC, to grow a sustainable tourism industry, there is also new focus on geographic and temporal dispersion of visitors. This means that moving forward there will be a focus on increasing visitation and tourism revenues in more areas in BC across more seasons. For emerging destinations, particularly in rural communities, this improves the economic diversification and resilience of communities. These actions will drive demand for top-quality cultural tourism experiences at Indigenous tourism businesses, as well as demand for labour at non-Indigenous tourism experiences.

Also, the federal and provincial tourism strategies have identified Indigenous tourism as a key growth sectors of the tourism economy in Canada and BC. Further, the federal and provincial tourism ministries have allocated funding to

<sup>82</sup> Conference Board of Canada. 2019. Can't Go it Alone. Immigration Is Key to Canada's Growth Strategy. <https://www.conferenceboard.ca/e-library/abstract.aspx?did=10150>

accelerate development of the Indigenous tourism sectors. An opportunity exists to leverage additional funds and/or initiatives to advance the BC Indigenous tourism labour situation. Specifically, the federal government has identified increased funding for Indigenous culinary experiences.

All of these factors lead to the continued opportunity to grow the number of Indigenous tourism and Indigenous cultural tourism businesses, as well as grow the size of the Indigenous tourism workforce that are employed at both Indigenous cultural tourism businesses and at non-Indigenous tourism businesses. Key findings for the Indigenous workforce, all tourism businesses, and non-Indigenous tourism businesses are outlined below.

## 6.2 Indigenous Workforce

The current and future Indigenous workforce has the characteristics to meet the needs of the growing demand for tourism jobs. This is supported by the following facts:

- Over the past decade the population of Indigenous people in BC has grown faster than the non-Indigenous population. In BC there are 270,580 Indigenous people, representing 16% of Canadian Indigenous people and almost 6% of British Columbia's population. This was up 16% from 2011 and 38% from 2006. Although, over time there has been increases in both the on and off-reserve populations, there has also been increased urbanization of the Indigenous people population. According to Statistics Canada, the urbanization of Indigenous peoples in Canada is due to multiple factors – including demographic growth, mobility and changing patterns of self-reported identity.
- Thus, the Indigenous population is younger and tend to be early mothers and lone parents compared to the non-Indigenous population. Indigenous people already employed in the tourism workforce to be female and younger (<35 years old) compared to the non-Indigenous tourism workforce.
- Indigenous people are more likely to live in rural BC than non-Indigenous people. In fact, about a third of Indigenous people live in the mainland / southwest region compared to 63% of non-Indigenous people. As mentioned earlier, regional analysis of the growing demand for tourism jobs demonstrates that more than half of growth will be strongest in rural areas of the province including the Northeast, in the Thompson Okanagan and Vancouver Island.
- There is growth in the employment participation rate and the employment rate of Indigenous British Columbians. In fact, between 2014 and 2019 was higher for Indigenous British Columbians compared to non-Indigenous British Columbians.
- The share of Indigenous people working in the tourism industry (5%) is growing and is larger than the share of Indigenous people working the overall BC (4%).
- Currently, a larger share of Indigenous British Columbians work in accommodations (6%) and food and beverage services (6%), 5% work in recreation and entertainment, while fewer work in transportation (4%) and in travel services (2%). Future tourism labour demand is projected to be larger in the accommodations and food and beverage services, creating a natural fit for Indigenous people.

There are well documented barriers to employment for Indigenous barriers. Overcoming these barriers will enable higher employment in the tourism sector in British Columbia. These include: the perception of shortage of jobs available, racism, discrimination and social exclusion, recruitment difficulties, literacy, skills education, technical, job-related skills, professional qualifications, work experience, cultural differences (including language), self-esteem, poverty and poor

housing, lack of driver's license, lack of transportation, childcare, lack of career planning and knowledge of where to work for a job, family structure, living in rural / remote areas and business labour policy.

The current and future Indigenous tourism workforce could benefit from:

- Culturally accessible and safe education and skills training
- Access to programs that help identify preferred career choices (career guidance) – this includes high school-based career counselling and professional development programs
- Access to secure and relevant employment services, especially in urban areas
- Access to culturally sensitive workplaces
- Access to work experience programs (especially for young Indigenous people), training and job advancement opportunities
- Access to mentoring and Indigenous role models
- Access to childcare programs and transportation to employment sites
- Access to more contacts / networking, resume writing skills or job finding clubs

The Indigenous workforce has the perception there is a lack of jobs which is contradictory to the current and future labour shortages in the tourism industry. In fact, a 2017 study found that 16% of Indigenous people said they wanted to work in tourism but could not find a job, this was double the overall average. There is an opportunity to ensure knowledge about the demand for tourism jobs is known by Indigenous communities, the workforce and post-secondary training institutions.

### 6.3 All Tourism Businesses

Past research has demonstrated that there is also a lack of Canadian business awareness of Indigenous employment programs. Tourism businesses could benefit from communication about the services that the 20+ BC ISET offices offer.

Indigenous and non-Indigenous tourism businesses could benefit from employer best practices that increase Indigenous retention, engagement and workplace development include:

1. Developing business recognition of the economic potential in commitments to Indigenous groups.
2. Participation in training a pool of qualified Indigenous workers.
3. Providing mentorship and career bridging programs, develop Indigenous-friendly workplace programs and or policies.
4. Participating in training a pool of qualified Indigenous workers.
5. Providing mentorship and career bridging programs.
6. Develop Indigenous-friendly workplace programs and / or policies.
7. Deliver community-based and engaging programming for diverse learning styles.
8. Engage in stronger collaboration and coordination among stakeholder with a focus on long-term partnerships.
9. Benefit from guidance in human resource management, and establish and implement policies for recruiting, integrating and retaining Indigenous workers.
10. Offer competitive compensation and benefits.
11. Provide time for Indigenous workers to participate in seasonal or traditional activities.

## 6.4 Non-Indigenous Tourism Businesses

There is the potential for better engagement of Canadian businesses with Indigenous communities to grow the Indigenous tourism workforce. National research suggests that businesses have low awareness of opportunities to partner with Indigenous communities, they lack strategy for how to do so, they do very little consultation with Indigenous communications and do not prioritize actions to engage with Indigenous communities. There is evidence that:

- Businesses with full partnerships, geared towards both business and community goals, reported they are hiring more Indigenous people, doing more business in their communities, and seeing their reputations grow.
- The Canadian hospitality sector 'sees' the labour solution of working with Indigenous groups yet has not acted and do not understand how to act. The retail sector is reactive and is most motivated in working with Indigenous groups and people.

### Challenges

This research has identified a number of challenges to overcome the labour and skills shortages that the BC tourism industry is facing.

- Develop ways to overcome the labour and skills shortages that the BC tourism industry is facing and to continue to improve the participation, employment rate, income and education attainment of Indigenous British Columbians.
- Many tourism businesses are in remote or rural areas are without access to a skilled workforce, valuable training programs and reliable transportation.
- The seasonal nature of tourism products in BC make it difficult for some employers to offer year-round, full-time employment, and also to entice seasonal workers to return year after year. The pressure is greatest in rural areas and on weather-dependent sectors where peak season is dependent on weather.
- Slim profit margins and small businesses within the tourism industry result in poor human resources practices, with little emphasis on training and skill development and leadership development.
- As with other sectors of the economy, the rapid rate of technological change is altering the type of training required for tourism jobs, there is and will be a continual need for on-going training in the tourism sector.
- There is insufficient housing (infrastructure and affordability in some locales) for tourism employees (as well as all industries), this will impact the likelihood of recruitment of Indigenous tourism people both on and off reserve.
- The perception of tourism weakens the interest of working in the industry – action is required to combat the poor awareness of the value of tourism and perception of low-paying jobs and long-term careers in tourism.
- There is competition for Indigenous workers with other higher paying sectors of the economy.
- Some research has recommended there is insufficient alignment of tourism education and training programs and industry. Small and rural operators are looking for accessible programming (e.g., location, cost, time), there is a need for businesses to participate in industry advisory committees and work experience / co-op programs. Also, there is a need to ensure the K-12 education system has content and teaching resources about jobs and careers in tourism are included in the curriculum development.
- There are numerous agencies and educations that train and support tourism worker, yet there is a need to improve efficiencies to overcome duplication and increase alignment of efforts amongst multiple agencies. Specifically, Industry Groups, DMOs, Government, Educators, Economic Development have all felt pressure to act on the labour shortages and HR challenges. These require alignment, coordination and improved communication efforts of private and public stakeholders to achieve the optimal return on the resources

invested in HR and workforce development for tourism. This is true for both Indigenous and non-Indigenous organizations and communities.

- Multiple barrier to Indigenous employment exists in the non-Indigenous tourism industry. It is necessary to develop businesses that are culturally sensitive and meet the needs of the Indigenous workforce. At the same time, supports for Indigenous people that improve confidence, skills and training, and improve awareness about available tourism jobs.
- Indigenous people tend to occupy lower paying positions in the tourism labour force – the challenge is to assist Indigenous tourism workers to move up to more senior roles in tourism businesses.
- There is a lack of businesses and employer knowledge about current employment programs.

## Opportunities

- Connect the large population of young Indigenous people with current and future vacant jobs in the tourism sector.
- Improve connection between potential Indigenous tourism employees with Indigenous and non-Indigenous tourism businesses and to improve the connection between employers and post-secondary tourism programs.
- Improve the perception of the value of long-term careers in the tourism industry, leverage the fact that more than a quarter of Canadians have worked in tourism at some point in their life and have a positive association with the industry.
- Expand online training opportunities to reduce cost of travel in order provide training opportunities for rural British Columbians.
- Continue to improve customer service levels in tourism businesses including Indigenous tourism businesses.
- Collaborate and develop partnerships on initiatives like affordable housing, transportation initiatives and other benefits like the provision of childcare.
- Adapt the current content and context of current skills training programs to provide leading learning experiences for the future Indigenous tourism workforce.
- Overcome Indigenous people barriers to finding employment in the tourism industry and to better connect rural BC tourism businesses with the rural Indigenous workforce.
- Grow the number of self-employed Indigenous British Columbians in the tourism industry.
- Engage the 20+ local Indigenous Skills and Employment Training agencies in Indigenous tourism workforce development.
- Document and broadly share the power of successful non-Indigenous business and Indigenous community partnerships related to tourism.
- Share information with non-Indigenous tourism businesses about how to engage with Indigenous communities and their workforce. Further, there is an opportunity to promote Indigenous groups ready for partnership and facilitate business-to-business mentorship in the tourism sector.
- Given the young nature of the Indigenous population and the relative low awareness of Indigenous communities by Canadian businesses, there is an opportunity to better communicate the value that young Indigenous labour force can bring to Canadian businesses.
- Tourism HR Canada has identified the need to develop a national Indigenous Tourism Labour Market Strategy with the ITAC. There is an opportunity to align initiatives and priorities with ITBC's federal counterparts.
- Continue to engage more women in the Indigenous tourism sector.
- Move Indigenous tourism workers up to more senior level positions.

## Knowledge Gaps

This literature review has identified that there are some gaps in our knowledge of Indigenous tourism workforce development. They include the needs to:

- Understand if the ISETs are engaged with tourism organizations and businesses.
- Ensure there is information available that evaluates current Indigenous employment programs; there is a need to determine the status of current programs and interest in new programs.
- Investigate if data exists about participation rates and outcomes of Indigenous students who participate in post-secondary tourism programs in BC.
- Better understand training needs of Indigenous tourism businesses and Indigenous cultural tourism businesses and align those needs with post-secondary education programs.
- Profile the difference between the needs of Indigenous cultural tourism businesses and the general tourism workforce. These differences will be identified with a future survey of Indigenous cultural tourism businesses and non-Indigenous tourism businesses.
- Gather Indigenous tourism workforce information on a community, sub-regional and regional basis. Currently, there are several studies being conducted in the province that are not yet complete. These study results could be incorporated into the findings later.
- Capitalize on the opportunity to learn about Indigenous recruitment and retention strategies used by other economic sectors (e.g., mining, health care).
- Continue working relationships between ITBC with Destinations BC, Destination Canada, and ITAC to improve research and outcomes of consumer demand for Indigenous experiences, including profiling detailed characteristics of visitors that enjoy Indigenous tourism experiences is dated.
- Developing working relationships with WorkSafeBC, go2HR and the First Nations Safety Council to better understand the Occupational Health and Safety status of Indigenous tourism businesses in British Columbia. Understanding the situation will help address labour shortages and safety concerns (if any) Indigenous tourism businesses.

There are also challenges with current national and provincial tourism employment statistics.

- Specifically, the 2016 Statistics Canada census data provides details about the Indigenous tourism workforce there are no details related to Indigenous cultural tourism. The sector and occupation codes used by Statistics Canada does not include a cultural identifier. ITBC will have to continue to initiate their own research to measure growth and characteristics of the Indigenous cultural tourism sector and workforce.<sup>83</sup>
- Currently, there is no readily available Indigenous tourism data from national surveys on a regional basis.
- The Indigenous Tourism workforce data summarized here is from the 2016 census which is only administered every five years. Annual performance tracking with this data set is impossible. Annual performance indicators will be valuable in the forthcoming labour market strategy; therefore, it will be necessary to investigate and determine if alternative sources of data are available. The Statistics Canada Labour Force Survey is one potential data source; although, it should be noted that Labour Force statistics do not collect data from Indigenous people living on reserve.

<sup>83</sup> Note: While the 2017 Aboriginal People Survey provides information on other labour market activities (hunting, fishing and trapping, gathering wild plants, making clothing or footwear and making carvings, jewellery and other kinds of artwork) used to supplement labour income there is a lack of information about how that converts to tourism activities. See report section 4.1.

Moving forward, there are several opportunities to improve research related to the Indigenous tourism labour market. Tourism HR Canada has identified the need to better measure the labour market in Canada. There is an opportunity to engage with Tourism HR Canada to ensure that Indigenous tourism labour force needs are incorporated into their work to better measure the labour force in Canada. Also, there is the opportunity to explore better measurement of the current and future labour supply (those currently in the workforce) rather than just demand, and of Indigenous people who are not participating in the labour force.



## Appendix A. List of Publications and Data Sources

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## Appendix B. Indigenous Skills Employment Training (ISETs) Details

Figure 41: BC Indigenous Employment Service Agencies

Tourism Region <sup>84</sup>	Indigenous Group	Delivery Organization & Location	Program
Provincial (BC)	Women	British Columbia Native Women's Association (BCNWA) Kamloops, BC <a href="http://www.bcnwa.weebly.com">www.bcnwa.weebly.com</a>	<ul style="list-style-type: none"> <li>• Employment training support for Indigenous women BC-wide</li> </ul>
Provincial (BC)	Métis	Métis Nation of British Columbia (MNBC) Surrey, BC <a href="https://www.mnbc.ca/">https://www.mnbc.ca/</a>	<ul style="list-style-type: none"> <li>• Métis Employment and Training Program</li> </ul>
Cariboo Chilcotin Coast	First Nations	Cariboo Chilcotin Aboriginal Training Employment Centre Society CCATEC Williams Lake, BC <a href="http://www.ccatec.com/">http://www.ccatec.com/</a>	<ul style="list-style-type: none"> <li>• Full compliment of ISET programs</li> </ul>
Cariboo Chilcotin Coast	First Nations	Mid Coast First Nations Society (MCFNTS) Bella Bella, BC <a href="http://www.mcfnts.ca/">http://www.mcfnts.ca/</a>	<ul style="list-style-type: none"> <li>• Direct Course Purchase Program</li> <li>• Job Development Program</li> <li>• Summer Student Work Experience Program (SSWP)</li> <li>• Work Experience Program (WEP)</li> <li>• Workplace Based Training Program</li> <li>• Aboriginal Transitions Student Handbook</li> </ul>
Kootenay Rockies	First Nations	Ktunaxa Nation Council Cranbrook, BC <a href="http://www.ktunaxa.org">http://www.ktunaxa.org</a>	<ul style="list-style-type: none"> <li>• Summer Student Program</li> <li>• BladeRunners</li> <li>• Ktunaxa / Kinbasket Aboriginal Training Council (KKATC)</li> <li>• Discretionary</li> <li>• Industry training</li> <li>• Educational sponsorship</li> </ul>
Northern BC	First Nations	Nisga'a Employment Skills and Training (NEST) New Aiyansh, BC <a href="http://nisgaaworks.ca/">http://nisgaaworks.ca/</a>	<ul style="list-style-type: none"> <li>• Job Board</li> <li>• Job Seekers Programs</li> <li>• Personal Success Planning</li> <li>• Resume Writing</li> <li>• Interview Skills</li> <li>• Mentorship</li> <li>• Job Matching</li> <li>• Coordinates Training</li> <li>• Group Training</li> <li>• Workplace Training</li> <li>• Trades Training</li> </ul>

<sup>84</sup> See following BC tourism regions map.

Tourism Region <sup>84</sup>	Indigenous Group	Delivery Organization & Location	Program
			<ul style="list-style-type: none"> <li>• Upgrading</li> <li>• Employer Services</li> <li>• Wage Subsidies</li> <li>• Job Matching</li> <li>• Workplace Training</li> <li>• Partnerships</li> </ul>
Northern BC	First Nations	North East Native Advancing Society (NENAS) Fort St. John, BC <a href="http://www.nenas.org/">http://www.nenas.org/</a>	<ul style="list-style-type: none"> <li>• Aboriginal Skills to Employment Training Strategy</li> <li>• Sas Natsadle Aboriginal Head Start Program</li> <li>• Infant and Child Development Program</li> <li>• Skills and Partnership Fund Initiative</li> <li>• Rising Spirit Aboriginal Youth Centre</li> <li>• Aboriginal Centre for Innovation and Leadership</li> </ul>
Northern BC	First Nations	Prince George Nechako Aboriginal Employment and Training Association (PGNAETA) Prince George, BC <a href="http://pgnaeta.bc.ca/">http://pgnaeta.bc.ca/</a>	<ul style="list-style-type: none"> <li>• Trades Access Program (TAP)</li> <li>• Customer Care Program (CCP)</li> <li>• Information Technology Program</li> </ul>
Northern BC	First Nations	Tribal Resources Investment Corporation (TRICORP) Prince Rupert, BC <a href="http://www.tricorp.ca/">http://www.tricorp.ca/</a>	<ul style="list-style-type: none"> <li>• Tricorp Employment, Skills &amp; Training Services (TESTS)</li> <li>• Workplace Essential Skills Trades Training (WESTT)</li> <li>• The Northwest Aboriginal Canadian Entrepreneurs™ (NW-ACE)</li> <li>• BladeRunners</li> </ul>
Thompson Okanagan	First Nations	Okanagan Training and Development Council (OTDC) Kelowna, BC <a href="https://www.otdc.org/">https://www.otdc.org/</a>	<ul style="list-style-type: none"> <li>• Course/Seat Purchase</li> <li>• Youth/Student Development</li> <li>• Workplace Training</li> <li>• Job Development Wage Subsidy</li> <li>• Employment Services Program</li> <li>• Human Resource Investment Fund</li> <li>• Disability Program</li> </ul>
Thompson Okanagan	First Nation	Shuswap Nation Tribal Council Kamloops, BC <a href="http://shuswapnation.org/">http://shuswapnation.org/</a>	<ul style="list-style-type: none"> <li>• Employment matching</li> <li>• Job postings</li> <li>• Training and education support</li> <li>• Employer support</li> </ul>
Thompson Okanagan	First Nations	Shuswap Nation Tribal Council Kamloops, BC <a href="http://shuswapnation.org/">http://shuswapnation.org/</a>	<ul style="list-style-type: none"> <li>• Summer Student Program</li> <li>• Direct Purchase/Demand Driven</li> <li>• Target Wage Subsidy Program</li> </ul>
Vancouver Coast and Mountains	Urban / Non-affiliated	Aboriginal Community Career Employment Services Society (ACCESS) West Vancouver, BC <a href="http://www.accessfutures.com/">http://www.accessfutures.com/</a>	<ul style="list-style-type: none"> <li>• Summer Student Employment Program</li> <li>• Electrical Foundation Program</li> <li>• Metal Fabrication Foundation Program</li> </ul>
Vancouver Coast and Mountains	First Nations	Lil'wat Nation Mount Currie, BC <a href="https://lilwat.ca/">https://lilwat.ca/</a>	<ul style="list-style-type: none"> <li>• Childcare</li> <li>• School</li> </ul>

Tourism Region <sup>84</sup>	Indigenous Group	Delivery Organization & Location	Program
			<ul style="list-style-type: none"> <li>• Post-Secondary Education and Training Opportunities at Home</li> </ul>
Vancouver Coast and Mountains	First Nations	Musqueam, Squamish and Tsleil-Waututh (MST) Vancouver, BC <a href="http://mstdevelopment.ca/about-us/the-partners/">http://mstdevelopment.ca/about-us/the-partners/</a>	<ul style="list-style-type: none"> <li>• Employment and training programs primarily for Band members</li> <li>• Development / partnering in training programs</li> <li>• ITA approved trades training centre for Level 1 Carpentry</li> <li>• Training and education support</li> <li>• Direct Course Purchase Program</li> <li>• Summer student placements</li> </ul>
Vancouver Coast and Mountains	First Nations	Sechelt First Nation Sechelt, BC <a href="https://shishalh.com/">https://shishalh.com/</a>	<ul style="list-style-type: none"> <li>• Health Programs</li> <li>• Housing Department</li> <li>• Social Development Program</li> <li>• Education Programs:</li> <li>• The shishálh Nation Education Department's mena (baby) program</li> <li>• Indigenous and Northern Affairs Canada Post-Secondary Studies Support Program</li> </ul>
Vancouver Coast and Mountains	First Nations	Sto:Lo Aboriginal Skills and Employment Training (SASET) Chilliwack, BC <a href="http://www.saset.ca/">http://www.saset.ca/</a>	<ul style="list-style-type: none"> <li>• Employment Services</li> <li>• BladeRunners</li> <li>• Culinary Arts</li> </ul>
Vancouver Coast and Mountains	First Nations	Tsawwassen First Nation Tsawwassen, BC <a href="http://tsawwassenfirstnation.com/">http://tsawwassenfirstnation.com/</a>	<ul style="list-style-type: none"> <li>• Employment matching</li> <li>• Job postings</li> <li>• Training and education support</li> <li>• Employer support</li> </ul>
Vancouver Island	First Nations	Coast Salish Employment & Training Society (CSETS) Duncan, BC <a href="http://csets.com/">http://csets.com/</a>	<ul style="list-style-type: none"> <li>• Employment matching</li> <li>• Job postings</li> <li>• Training and education support</li> <li>• Youth initiatives</li> <li>• Employer support</li> <li>• BladeRunners</li> <li>• Sub-agreements with childcare providers</li> </ul>
Vancouver Island	First Nations	North Vancouver Island Aboriginal Training Society Campbell River, BC <a href="http://www.nviats.com/">http://www.nviats.com/</a>	<ul style="list-style-type: none"> <li>• BladeRunners</li> <li>• Community Partnership Program</li> <li>• Fresh Start Program</li> <li>• Ready to Work Program</li> <li>• Rent Smart</li> <li>• Summer Student Program</li> <li>• Wage Subsidy Program</li> <li>• Walk In Client Program</li> <li>• Workshop Series</li> </ul>
Vancouver Island	First Nations	Nuuchah-nulth Employment and Training Program (NETP)	<ul style="list-style-type: none"> <li>• Capital Programs</li> <li>• Child Welfare</li> </ul>

Tourism Region <sup>84</sup>	Indigenous Group	Delivery Organization & Location	Program
		Port Alberni, BC <a href="https://nuuchahnulth.org/">https://nuuchahnulth.org/</a>	<ul style="list-style-type: none"> <li>• Economic Development</li> <li>• Education, Employment Training</li> <li>• Financial Administrative Support</li> <li>• Fisheries</li> <li>• Health Benefits</li> <li>• Community Infrastructure and Housing Development</li> <li>• Nursing, Mental Health</li> <li>• Membership</li> <li>• Newspaper (Ha-Shilth-Sa)</li> <li>• Social Development</li> </ul>

Figure 42: BC Regional Tourism Map





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