INDIGENOUS TOURISM BC

INDIGENOUS TOURISM LABOUR MARKET RESEARCH

Roots to a Future – Research Findings

Canada

BRITISH COLUMBIA

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.

Project Advisory Committee

The project is guided by a Project Advisory Committee (PAC) consisting of Indigenous and mainstream tourism industry leaders. The members provided advice throughout the project on the research activities, reviewed project reports, and offered guidance on strategic activities.

- Krista Bax, CEO, go2HR
- Sharon Bondhogg, Owner/Operator, Kekuli Café / Director, Indigenous Tourism BC
- Andrea Hinck, Director of Industry Training, go2HR
- Walt Judas, CEO, Tourism Industry Association of BC (TIABC)
- Richard Porges, Acting CEO, Destination BC
- Arun Subramanian, Director of Industry Health & Safety, go2HR
- Sandra White, Sandra White & Associates

The Consultants – O'Neil Marketing & Consulting

O'Neil Marketing & Consulting collaborates with other leaders in Indigenous and tourism research and economic forecasts. For more than 25 years, Beverley O'Neil (Kławum' Paŧki) of the Ktunaxa Nation has tailored project teams to the client's project. O'Neil and team members have worked on projects that defined Indigenous tourism in British Columbia, Canada, and guided Indigenous people and Nations worldwide in designing tourism experiences that reflect their story. More info: www.designingnations.com

Prepared by:
O'Neil Marketing & Consulting
North Vancouver, BC
info@designingnations.com

In Partnership with:
Brian Payer (Ojibwe), Payer & Associates
Krista Morten, Align Consulting Group
Dr. Peter Williams
Roslyn Kunin, Roslyn Kunin & Associates
Lee Gan, Roslyn Kunin & Associates

February 11, 2021

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

INDIGENOUS TOURISM BC

INDIGENOUS TOURISM LABOUR MARKET RESEARCH

Roots to a Future – Research Findings

TABLE OF CONTENTS

INDIGENOUS TOURISM BC

INDIGENOUS TOURISM LABOUR MARKET RESEARCH
Roots to a Future – Research Findings

EXECUTIVE SUMMARY

Tourism was one of the largest and fastest-growing economic sectors in the world, Canada, and British Columbia. 2019 was a banner year. It marked the sixth consecutive year of increased travel to Canada and was the third consecutive record-breaking year of travellers to Canada at 22.1 million visitors. British Columbia tourism was booming, and the industry wondered how it would continue to satisfy market demand and find the staff to fulfill that demand.

In November 2019, the Province of British Columbia formally announced the funding to Indigenous Tourism British Columbia (ITBC) of a labour market study of Indigenous Tourism in British Columbia to conduct in-depth labour market research on the specific needs and challenges of the Indigenous tourism sector in British Columbia.

The following report highlights key findings from that research. Its findings are based on a combination of qualitative and quantitative insights gathered from Indigenous and other relevant tourism stakeholders through 2020. These stakeholders were primarily Indigenous, as well as other tourism industry employers, trainers, and potential employees familiar with Indigenous tourism employment opportunities and challenges. This research was also preceded with a Literature Review of reports and research on Indigenous and general tourism labour demands, and Indigenous labour in general.

Faced with the unanticipated disruptions created by COVID-19's arrival, the data collection methods used in this research were adjusted and modified (on-the-go) to ensure that the responses of an appropriate number and cross-section of stakeholders were included. This involved using a mix of on-line surveys, individual on-line and personal interviews, and provincial webinar forums panel discussions to identify and confirm how best to build the human resource capacity of Indigenous tourism operations and inspire Indigenous people to pursue careers in tourism. As such, the findings highlight the collective perspectives of 697 touchpoints with stakeholders.

Key Findings

The Indigenous tourism Industry has grown dramatically in terms of businesses and employees over the past two decades and there was confidence amongst stakeholders that it will continue to grow. Since 2017, Indigenous tourism businesses in British Columbia grew 18%, and since 2003 it grew 170% from 181 businesses to 488 in 2020.

An updated inventory of Indigenous Tourism businesses identified that in 2020 there were 488 Indigenous tourism businesses which includes 14 that are known to be Métis owned. Almost a quarter (24%) of Indigenous tourism businesses are in the Accommodations sector followed by Retail-Gas Stations (19%), Outdoor Adventure (15%), Retail (13%) and Attractions (12%). By region, Northern BC hosts has the highest number of businesses (29%) of the Indigenous tourism businesses followed by Vancouver Island (21%), Vancouver Coast and Mountains (19%), the Thompson Okanagan (15%), Cariboo Chilcotin Coast (10%) and the Kootenay Rockies (6%).

Of all Indigenous tourism businesses, the 2019 size of the workforce was roughly 4,248. The largest employer amongst the Indigenous tourism sectors is businesses providing Accommodation services, which accounts for almost 35% of the total employment. Employment in Food and Beverage accounts for 23% followed by employment in Outdoor Adventure (15%). The Retail sector, when Gas Stations are included, also supplies one in five jobs.

The project purpose was to "conduct in-depth labour market research on the specific needs and challenges of the Indigenous tourism sector." The original approach included a forecast of labour demands following a burgeoning 2019 tourism season with predicted difficulties to attracting and retaining people into Indigenous tourism. Subsequently, the spring 2020 COVID-19 global pandemic shifted this approach to calculating when the Indigenous tourism industry would return to 2019 employment levels. Based on 2019 data and the likely COVID-19 pandemic impacts, three scenarios were computed.

- Scenario 1: Return to 2019 Employment Levels in 2023
- Scenario 2: Return to 2019 Employment Levels in 2024
- Scenario 3: Return to 2019 Employment Levels in 2025

A hopeful and realistic outlook of Indigenous tourism is that employment levels return to 2019 levels by 2024, though one must recognize that this will vary by business type and tourism region, as well as operator and management ability and resources. Already in summer 2020, Indigenous tourism businesses in resort destinations (i.e., Whistler, Tofino-Ucluelet, and Okanagan) throughout British Columbia experienced banner years, and campgrounds were able to reopen. These gains though will not be realized by all Indigenous tourism sectors, operators, or regions. Add that Indigenous cultural tourism markets are primarily International visitors, which until the COVID-19 pandemic ends and borders reopen, they will be restricted from travelling into or may be reluctant to travel to Canada, and especially to regions where COVID-19 rates were high.

Indigenous People in Tourism

There is a growing demographic of Indigenous people suited to careers in the tourism industry. However, there is increasing competition both within and beyond the Indigenous tourism sector for them. Tourism has attractive features for Indigenous people that are non-wage related, that other industries are unable to offer, such as jobs that focus on the individual's cultural knowledge and value of soft skills rather than emphasis on educational attainment and technical skills. The industry also creates opportunities for Indigenous people to develop and share their cultural knowledge.

- First Nation communities and leaders believe tourism provides a means for Indigenous peoples to exercise sovereignty, for Elders to share culture with youth, and for youth to connect with the earth and develop self-confidence and self-esteem.
- Tourism provides Indigenous people opportunities to work on the land and reunite with their roots and share their culture.

- It is an industry where Indigenous people can supplement or generate their full income through other labour, or self-employment, such as the sale of arts and crafts, harvested non-timber food products, and other manufactured goods, to contract their unique knowledge (i.e., culture, language, storytelling, welcoming prayers), or to share their culture through performance.

Travel and Tourism provides great opportunities for women's employment including in other labour, self-employment, arts and crafts, harvesting, etc.

There are a few entrance points and pathways to Indigenous participation in tourism.

- Employment – Indigenous people would enter the industry as employees, such as their first job, or as a semi- or skilled worker with educational or technical requirements, or with cultural skills and local knowledge. Many tourism managers were trained on-the-job and promoted within the ranks to achieve management status.
- Self-employment – as an entrepreneur at the start of their tourism career, or at various life stages after they first enter tourism as an employee then later launch their own business. They may also have a side business as a 'seller of goods', such as gifts, arts, food products and / or services like a cultural teacher, storyteller, or performer, while they are employed directly in a tourism business or another industry.

Opportunities to practice Indigenous culture and connect with the lands are key features that attract a segment of the Indigenous labour force, while others may seek more job basics – good pay with benefits and flexibility, and a respectful workplace free of discrimination and bullying. Some will seek job supports for training, and the prospects for promotion, while others want the opportunity to practice and share their culture in the workplace. Like other non-Indigenous people, the Indigenous person's employment decision will be influenced by the reputation of the employer, employee standard and cultural activities, and the availability of housing, transportation, childcare and training benefits could also influence their decisions.

Indigenous owned tourism businesses, that were small (employing less than 25 people) fostered a work environment that was more familiar to the Indigenous person. Factors that influenced Indigenous people's decision to seek employment in tourism workplaces included:

- Job-Personality Match – provided a job that suited their interests – one that they could be passionate about and offered a fast-paced busy workplace.
- Career / Advancement opportunities – provided the opportunity to learn and try other positions and had career advancement opportunities.
- Workplace Environment – offered them a place where they would be respected and valued, and the work would be fun and enjoyable.
- Customer Interaction – provided chances to interact with customers – which could be what attracts an employee to a destination resort.
- Wage rate – provided a living wage, and one that reflected the value of the work and its demands.
- Reputation of Business – which was reflected in the people and management, and awareness of why employees left or were dismissed.
- Indigenous owned and operated – fostered a familiar environment with work values that were like theirs.
- Location – provided jobs in a place suited to their lifestyle.

Typical reasons cited by these informants for leaving an employer included:

- Wages – pay is low or lower than market rates for similar positions elsewhere.
- Reduction in Hours – work hours are reduced.
- Workplace Safety – workplace conditions are unsafe and unhealthy[1] (remarks were before COVID-19).
- Discrimination and Unfair Treatment – workplace discrimination, feeling disrespected, being overlooked for promotions, unfair treatment, bullying by co-workers, disrespect, lateral violence overlooked.
- Wrong Job – the position did not match the worker's interests and / or values do not align.
- Dead end job – there are no advancement opportunities.
- Management and Leadership – the management is not skilled and does not provide leadership, or direction and support to employees, or does not communicate well.

Employers and their Perspectives

On average, Indigenous tourism employers incorporated about 3.5 cultural features in their business offerings. Most frequently (30+%) of them identifies these features as being related to Indigenous aspects or food, guided tours, storytelling, and arts and crafts.

There is growing tourism industry recognition that 'well-equipped' Indigenous employees can bring a beneficial competitive cultural element to Indigenous tourism operations and communities, as well as other non-Indigenous tourism businesses.

About 40% of Indigenous tourism employer top-of-mind comments suggested a need to increase employee knowledge concerning Indigenous related cultural history, environmental / ecological, and various forms of arts and craft and performing arts.

Indigenous tourism businesses identified challenges with recruiting candidates.

- Overall, about 33% of all Indigenous tourism employers indicated that they had challenges recruiting workers for their businesses in 2019.
- Of businesses with challenges, about 2.5 positions per business remained unfilled during 2019, and anticipated future growth in employee rosters was expected to increase through 2015.
- Those positions cited by employers as being most challenging to recruit (10+%) were linked to cook, guiding, retail sales, driver, cleaner, desk clerk, chef, and musician positions.

Those factors most frequently cited as extremely challenging recruitment barriers were not being able to provide candidates with competitive salaries / wages (41%); access to appropriate housing (38%), and appropriate training / education opportunities (38%).

There is need to expand the range and reach of employee recruitment approaches currently used by Indigenous tourism operators. Those approaches most frequently used (40+%) are primarily locally based and include contacting

[1] Unsafe and unhealthy workplace environment was indicated before the COVID-19 pandemic was declared in March 2020.

relatives / friends, reviewing Indigenous newsletters, websites, educational institute postings, etc., and reaching out to internal business connections (e.g., employee and other related businesses).

Other recruitment options frequently highlighted in broader top of mind discussions included building partnerships with Indigenous employment agencies (ISETs), educational and training institutes, and Indigenous communities.

Non-Indigenous tourism operators had similar challenges to recruiting Indigenous candidates, adding that they do not know how to find and approach Indigenous people.

Training and Educational Opportunities

Indigenous tourism businesses mentioned, training and educational opportunities as being particularly important to both the recruitment and retention of employees. Indigenous people desiring to boost their education prefer programs that have Indigenous teachings by Indigenous people.

Types of developmental training / education noted most frequently included customized workplace and on-the-job training programs (79%), Certificate (e.g., FirstHost, Food Safe, Commercial Transportation Licensing, Guide) (68%) and Professional training (58%).

Providing on-going mentoring for employees was also noted as an important means of instilling loyalty of employees. Many stakeholders surveyed (38%) highlighted the importance of providing in-situ training (e.g., training offered in the community, or on the educational site, a learning institution, and in the workplace), and role model mentoring programs (38%).

Recruitment and Hiring Approaches

Employer requirements for skilled, educated or entry level positions, should not prevent the hiring of person who would otherwise have the ideal personality and other soft skills (positive attitude, clear communication, listening, assertiveness, sense of humor, empathy, taking responsibility, etc.) for the position. Soft skills make a person a good employee, they are not so much taught as they are ‘cultivated’, while ‘learnable’ criteria can be developed after hiring, such as on-the-job or through courses and workshops.

The Indigenous and Métis communities are positioned to support Indigenous people with acquiring employment credentials. Indigenous Skills and Employment and Training agencies (ISETs) offer industry and institute developed programs, such as FirstHost, Food Safe, Commercial Transportation Licensing, Guiding, and support Indigenous people in their educational and career pursuits of professional and apprenticeable skills training programs (e.g., professional cook, accounting, technology applications, etc.).

Indigenous communities that are also the owner or partners in tourism businesses require a strategic approach to human resources planning and hiring, with hiring policies that both attract Indigenous candidates yet are balanced with healthy business management practices. For example, a Band that intends to create employment for its citizens could have a general policy that grants Indigenous candidates’ preference when the position requirements are met, however, Band governance should also ensure it does not interfere with business management, especially on making critical employment decisions like dismissing an under-performing employee.

Bands developing tourism experiences must include human resources strategies as part of the business feasibility and planning processes. These strategies must cover how labour will be attracted, trained, retained, promoted, and supported, as well as how housing and transportation shortages will be mitigated. The HR strategy should include how labour shortages will be filled, which may include soliciting non-Indigenous local and foreign labour.

Employers would benefit from setting up partnerships to recruit with the Indigenous community and their network, such as ISETs and Friendship Centres, or more targeted groups like Youth Centres, and Women's groups. Indigenous agencies provide a multitude of supports for Indigenous people seeking employment and employers.

Modification to the hiring and application process to be more flexible and welcoming are also needed. Unless the job requires strong written and grammatical skills, amend the application process to reflect the activities of the job. For example, if it is an outdoor guide, bring the person outside and have them show you around.

Employee retention is best attained by creating an environment where people want to be. Employers should focus on being the 'employer of choice' through developing a great reputation. This reputation is built on the way management and co-workers treat the Indigenous employee, along with providing engaging work with competitive wages to other tourism and industry sectors and offering benefits that appeal to the Indigenous employee and go beyond standard workplace benefits. These include incentives and support to develop skills and opportunities to advance, along with time off to participate in community and cultural activities, and team and social activities on the workplace.

Some factors that could help attract and retain an Indigenous workforce include:

- Direct Promotion to Indigenous Peoples – indicating they are invited and wanted, and their cultural knowledge is in demand. Indigenous people want to know they will be respectfully and fairly considered for employment, including once hired their contributions and assets are continually valued. Employers need to sell themselves to attract Indigenous people to join their employ. Application processes and forms need to be user friendly, and free of false barriers.[2]
- Spaces for Elders and Indigenous Knowledge Keepers – included in tourism through career and contracting opportunities at the tourism site, and as trainers and educators.
- Work Experience Programs – offered for all Indigenous people, especially for young Indigenous people, which includes on-the-job training, and job advancement opportunities into supervisory and management positions.
- Education and Skills Training – that is culturally accessible and safe, and is delivered locally or easily reachable for Indigenous people. This is through local delivery in person, fully funded with learner's supports such as food, daycare and coverage for training materials and equipment (i.e., books, supplies, required safety equipment, job tools).
- Guidance with Career Planning – such as access to supports that help identify preferred career choices (career guidance) whether through an employment service or on-the-job Human Resources Counsellor. This can start with a high school program that introduces youth to various tourism careers and other professional development programs that match the individuals interests and identify gaps in skills and credentials.

[2] A false barrier in a job is criteria that is identified as a requirement for a job but is not necessary for a person to fully perform the job. For example, requiring a degree in Anthropology for a tour guide position that is to provide information on local Indigenous knowledge, or a master's degree to post to social media.

- Informational Literature on Tourism Careers – building awareness of tourism as a career choice, its benefits and features tailored to Indigenous values, and its career pathways, and develop off-season tourism opportunities to increase employment availability in spring and fall.
- Safe and Respectful Workplaces – that are culturally sensitive, free of harassment and bullying, and provide career and promotional opportunities.
- Employee Supports – such as childcare programs and transportation to employment sites, and on-the-job meals.
- Standard and Other Employee Benefits – employee work benefits that are both government and employer driven such as pension plans, WorkSafeBC, on-the-job training, workplace incentives like bonuses and fun engaging activities, and opportunities to connect culturally.

Moving Forward

There is a critical need for a comprehensive labour market strategy that nurtures career awareness and readiness, positive employment experiences, and industry and employer constancy amongst Indigenous people. An Indigenous tourism labour strategy should have:

- Lead Organization – any strategy requires a leader – a role Indigenous Tourism British Columbia is well positioned to fill. Joining ITBC on this endeavor would be other tourism, sectoral, employment, and educational organizations.

Institutional and Industry

- Strategic Partnerships, Training, and Recruitment Approaches – designed for the Indigenous person, and in addition to these are recruitment and retention approaches, partnerships with tourism and other organizations.
- Research – that is improved and ongoing which tracks the size and characteristics of the Indigenous tourism workforce including cultural tourism and advocacy activities, and interest in the industry.
- Employer and Business Support – organizational long-term vision and human resources planning tools and training.
- Marketing Campaign – recruitment and retention designed to attract Indigenous labour with messaging and imagery that is specific to Indigenous people and promotes the value and benefits of tourism with the goal of being the ‘employer of choice’.
- Indigenous People Training and Capacity Development – to attain required workplace and other certifications needed to work in the tourism industry and sectors, like first aid and drivers licence, plus training that supports for career advancement, and skills development in fields like culture, knowledge, management, and operations.

There are several constraints to Indigenous tourism businesses and Indigenous people that limit Indigenous business development and people entering and advancing in the industry. An Indigenous tourism labour strategy requires Frist Nation community development of:

- Community Infrastructure – internet connectivity that is high speed and affordable, and locally available accredited and post-secondary programming.
- Transportation – that is available and affordable to and from employment, and aligns with work hours (i.e., runs early and late).
- Housing – in the area that is affordable and near the workplace.

INDIGENOUS TOURISM BC

INDIGENOUS TOURISM LABOUR MARKET RESEARCH
Roots to a Future – Research Findings
2020-21

1 INTRODUCTION

Tourism was one of the largest and fastest-growing economic sectors in the world, Canada, and British Columbia. 2019 was a banner year. It marked the sixth consecutive year of increased travel to Canada and was the third consecutive record-breaking year of travellers to Canada at 22.1 million visitors.[3] British Columbia tourism was booming, and the industry wondered how it would continue to satisfy market demand and find the staff to fulfill that demand.

Tourism to Indigenous people is more than an industry. Indigenous Cultural Tourism (ICT) provides opportunities for Indigenous people, from the Elderly to the young, to share their cultural knowledge and speak their Indigenous languages while offering prospects to all Indigenous peoples to strengthen their socio-economic status in regions where few economic opportunities exist. Tourism is also 'an act of sovereignty' which enables Indigenous people and nations to reconnect to their land and resources, exercise their inherent Aboriginal Rights and Title, and re-establish leadership in their traditional lands.

In November 2019, the Province of British Columbia formally announced the funding to Indigenous Tourism BC (ITBC) of a labour market study of Indigenous Tourism in British Columbia. This research report was preceded by an initial review of the Indigenous tourism labour industry. This research report leads to a Provincial Labour Strategy on how to attract and retain Indigenous labour and increase Indigenous employment, and a Workplan for implementing the strategy.

1.1 About Indigenous Tourism BC

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

[3] 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

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.

1.2 Indigenous Tourism Labour Research Project

ITBC launched the tourism labour research project to "strengthen the sector and ensure that Indigenous peoples and tourism businesses are well placed to meet the demand for Indigenous cultural experiences". The project is designed to inform and understand the specific needs and challenges of the Indigenous tourism sector and develop a strategic approach to address labour market challenges in one of the province's highest-potential sectors.

This four-phase project started in 2018 with the execution of Phase 1 initial review that framed the ensuring phases as: Phase 2 being research activities; Phase 3 a strategy outlining activities that focus on the retention and increase of Indigenous employment in the tourism industry; and Phase 4 detailing the workplan to implement the strategy.

Exhibit 1: ITBC Labour Research Project Stages

This Phase 2 research component:

- Defines the Indigenous tourism labour market.
- Provides a detailed description of labour market conditions in the sector, including types and number of businesses by subsector.
- Describes the types of occupations by National Occupational Code (NOC).
- Describes characteristics of the workforce.
- Classifies businesses by North American Industry Classification (NAIC) code.
- Predicts when the Indigenous tourism industry will recover to the 2019 labour levels.
- Identifies gaps, challenges and opportunities in occupations, training, and skills development.
- Profiles the Indigenous tourism labour market for each tourism region (see Appendix B).

1.3 Research Approach and Data Collection Methods

Various research activities were conducted in 2020 to inform this report's findings. The project was guided by a Project Advisory Committee consisting of tourism leaders from the Indigenous and non-Indigenous community. The Committee provided advice during meetings and personal interviews that formed steered various aspects of the project including report content. Other activities included a literature review, Indigenous and non-Indigenous tourism business surveys, an update to the inventory of BC Indigenous tourism businesses, as well as an estimate of 2019 employment patterns at those businesses by job type, .as well as a forecast of future employment levels through to 2027.

In addition, significant resources were applied to outreach activities to ensure perspectives about the Indigenous tourism labour market were collected from other stakeholders throughout British Columbia. Outreach activities included one-on-one interviews, regional open houses, and provincial online key-topic forums.

Altogether, 697 touchpoints with people throughout British Columbia provided input to this labour market research project (Exhibit 2).

Exhibit 2: Outreach Total Participation

	Touchpoints
Online Surveys	
Indigenous Tourism Business Survey	193
Non-Indigenous Tourism Business Survey	68
Outreach Activities	
Focus Groups[4]	76
Regional Open Houses	74
One-On-One Interviews	79
Online Provincial Engagement Sessions	207
Total	697

This report summarizes data collected in all stages and provides strategic insights for the development of the Indigenous Tourism Labour Market Strategy in 2021.

- Literature Review – The literature review collected both qualitative and quantitative information concerning Indigenous peoples, the tourism industry, the BC tourism labour market and the BC Indigenous tourism labour market, various strategies, reports and publications by organizations working in tourism and labour market initiatives, and key findings. The literature review is found under separate cover and is available from Indigenous Tourism BC.
- Indigenous Tourism Business List – Foundational to the research is the list of Indigenous tourism businesses in British Columbia. This inventory was originally developed in 1997 and since that time has been updated during various research projects by searching online to confirm continued operations and identify new ventures, contacting economic development agencies, and melding ITBC member lists with the primary list.
- Indigenous Tourism Business Survey – An online Indigenous Tourism Operator survey collected both quantitative and qualitative data from business leaders throughout British Columbia. It examined such business subjects like business demographics, employee characteristics including position title and type, labour market challenges and human resource practices, as well as employee development activities and use of foreign labour,

[4] Focus Groups includes Indigenous individuals such as employees, and students.

and questions on the impacts of COVID-19. Data was collected in early April to June of 2020, except for Gas Stations and Festivals and Events where telephone surveys were conducted of a shorter version of the Indigenous tourism operator survey was adapted for these two sectors. This approach was taken for these sectors as the majority of Gas Stations did not have emails, and there was a low response to the online survey for festivals and events (see Appendix D for all surveys). In the end, 193 survey responses were collected. Responses are summarized in Section 4.3 Indigenous Tourism Business Survey Findings, and the Indigenous Business Survey Methodology is explained in Appendix E.

Detailed data about the number and type of employees at each business was collected and used together with the number of Indigenous Tourism Businesses in BC to estimate the number of people employed by the Indigenous Tourism sectors (see Section 8.4 Labour Forecast, page 91). To ensure comparability with other research, and to initiate the career path and educational mapping of key occupations, the positions at each business were coded into National Occupation Code (NOC) classification units. Businesses were also categorized into North American Industry Classification System (NAICS) codes based on their primary revenue generating activity (Exhibit 23).

- Non-Indigenous Tourism Business Survey – An online survey of non-Indigenous tourism businesses was conducted in fall 2020. Information was gathered about COVID-19 impacts, past and future employment of Indigenous people, recruitment and retention challenges and support programs and the use of foreign labour. The survey was distributed by go2HR and other partner industry organizations. Eventually 68 businesses provided their remarks on those aspects of the survey that applied to their businesses (see Section 7 Non-Indigenous Tourism Businesses, page 65 for a summary of the survey responses and Appendix D for the questionnaire).
- Outreach Activities – There were comprehensive outreach activities in 2020, including one-on-one interviews, focus groups, regional open houses and four provincial online forums. Due to the COVID-19 pandemic that was declared in March 2020, in-person sessions needed to pivot to an online platform and telephone conversations. Outreach activities focused on getting Indigenous and non-Indigenous people's perspectives on key challenges and actions that could shape the future of the Indigenous tourism labour market in British Columbia. Telephone interviews were conducted with Indigenous and non-Indigenous tourism employers, tourism industry and sector organizations, plus Indigenous agencies and influencers (see Appendix A for list of provincial townhall panelists).

Exhibit 3: Outreach Focus Groups and Regional Open House Attendance

Focus Group Attendance

Region	#
Kootenay Rockies[1]	30
Vancouver Island[2]	16
Thompson Okanagan	5
Cariboo Chilcotin Coast	7
Northern BC	3
Vancouver Coast Mountain	6
BC General & Métis	9
Total	76

Regional Open House Attendance

Region	Location	#
KR - Kootenay Rockies	Cranbrook	23
VI - Vancouver Island	Nanaimo	26
TO - Thompson Okanagan	Kelowna	25
Total		74

[1] Kootenay Rockies – there was three focus groups held – 10 operators, 14 student / individual / trainee / employee, 6 employees
[2] Vancouver Island – there was three focus groups held – 5 students, 6 faculty, 5 operators

The final outreach program included four online provincial engagement sessions in late November and early December 2020. The sessions were designed to validate and elaborate on the findings of the Indigenous Tourism Labour Market research conducted before November 2020. In total, 207 people participated in the four sessions of which 77% attended more than one. Following each session, registrants were invited to complete an online questionnaire. Overall, 34 responses were received from 21 unique responders. During the sessions, participants completed online polling questions related to the topic and interim study results (see Appendix D for the questionnaire and polling questions).

Exhibit 4: Provincial Engagement Participation

Session	Attended
#1 - November 25 - Overcoming Labour Challenges	49
#2 - November 26 - Culture and Indigenous people	43
#3 - December 1 - Smart Practices	65
#4 - December 2 - Future of Labour	50
Total	207

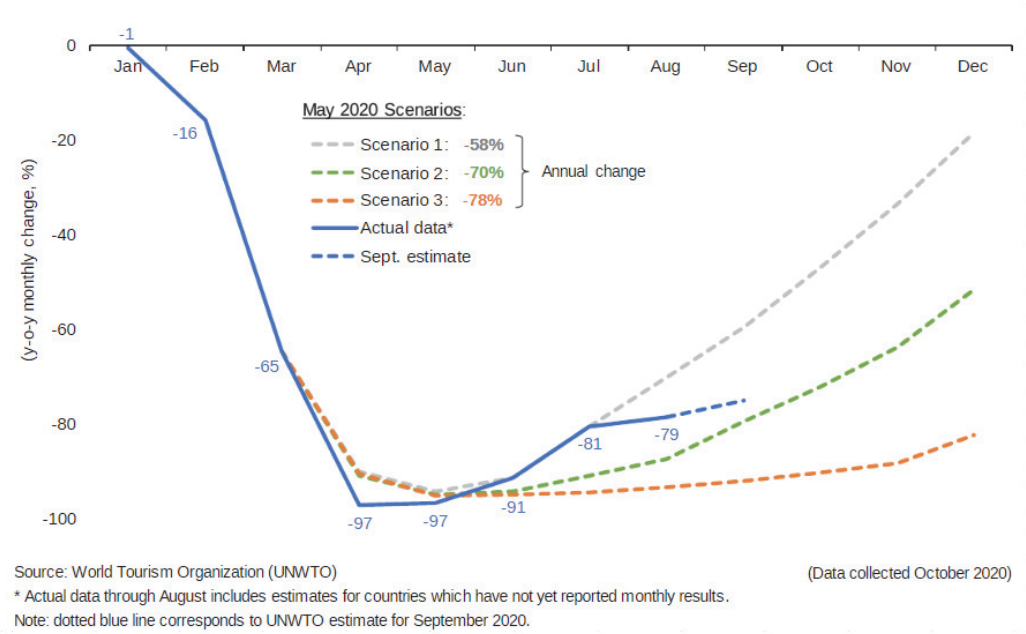
2 COVID-19 IMPACTS ON TOURISM

COVID-19 has had a devastating impact on the tourism industry. In 2020, global International Tourist Arrivals decreased by 74% compared to 2019. This translated into a loss of $1 trillion USD in export revenues– over eleven times what was lost during the whole of the 2009 global economic crisis.[5]

The United Nations World Tourism Organizations (UNWTO) scenarios forecasted declines in arrivals from international tourism of 58%-78% in 2020. The Canada border with the United States closed in 2020 and continued to be closed into 2021. Related to the COVID-19 pandemic, other countries limited or closed borders and flights in 2020 and remained in 2021.[6]

Factors driving when and how recovery will occur are influenced by the speed of containment and variant growth, development of vaccines, the duration of travel restrictions, and the gradual re-opening of borders (Exhibit 5).

Exhibit 5: International Arrivals in 2020, YTD Results and Scenarios (UNWTO)



In Canada, the International (US and Overseas) borders were closed to non-essential (leisure) traffic in March 2020, although air passenger traffic to and from the US was permitted and dependent upon US state quarantine regulations. In addition, all persons returning or entering Canada were required to quarantine for two weeks upon arrival.

[5] United Nations World Tourism Organization. 2021. UNWTO World Tourism Barometer and Statistical Annex, January 2021. https://www.e-unwto.org/doi/abs/10.18111/wtobarometereng.2021.19.1.1

[6] United Nations World Tourism Organization. 2020. International Tourism 2020 Scenarios https://www.unwto.org/news/covid-19-international-tourist-numbers-could-fall-60-80-in-2020

In October 2020, Destination Canada estimated that Canadian tourism revenues in 2020 would be $41.3 billion, down 61% from 2019.[7] For BC, Destination Canada estimates export (international) revenue losses for 2020 at $4.57 billion, down 83% from 2019.[8]

Due to surges in COVID-19 cases in Canada and the United States, the border remained closed into 2021, with no anticipated date of reopening. In late November 2020, Destination Canada prepared three scenarios for tourism recovery in Canada. The scenarios were based on re-opening of international borders[9].

1. January 2021 Canada-USA Border Reopening – tourism revenues will increase from ~40B in 2020 to $57.0 B in 2021 and fully recovering to 2019 levels by 2024.
2. April 2021 Canada-USA Border Reopening – tourism revenue is forecasted to reach $48.4 B in 2021 and to recover to 2019 levels by 2025.
3. October 2021 Canada-USA Border Reopening – recovery to 2019 levels is not expected until 2026.

With the announcement of BC's Restart Plan on May 24, 2020, Destination BC estimated that BC's $21.5 billion annual tourism industry may see a 67% decrease to $6.7 billion in 2020.[10]. This is likely to be the best-case scenario; the actual decline could be significantly greater. This represents an estimated $9.8 billion loss for Metro Vancouver alone, reducing the visitor economy to $4.6 billion for that area. Destination BC is currently working towards updating their scenarios for tourism recovery in the province.

In British Columbia, year-to-date tourism indicators suggested significant declines (-27% to-83%) in the first half of 2020 (Exhibit 6). COVID-19 impacts on the tourism industry varied throughout the province and differed by region and tourism sector. Declines in performance were most significant in urban areas like Vancouver and Victoria and were significant, yet less severe, in the interior of British Columbia like the Kootenay Rockies and Thompson Okanagan regions. Support to the industry came from BC resident participation in outdoor activities like camping, golfing, and fishing which off-set losses from other domestic and international markets indoor experiences such as meetings, other museums, and attractions.

[7] Destination Canada. 2020. State of the Industry October 2020. https://www.destinationcanada.com/sites/default/files/archive/1216-Destination%20Canada%27s%20State%20of%20the%20Industry%20Update%20-%20October%202020/State%20of%20the%20Industry_Oct%202020_FINAL_EN.pdf

[8] Destination Canada. 2020. COVID-19 Impact and Recovery Report: International Summary. December 29, 2020. https://www.destinationcanada.com/sites/default/files/archive/1285-COVID-19%20Impact%20and%20Recovery%20Report%20-%20International%20Summary%20-%20December%2029%2C%202020/COVID-international-infographic-Dec29_Hyperlinked_EN.pdf

[9] Destination Canada. 2020. Visitor Demand Forecast Update (November 2020). https://www.destinationcanada.com/sites/default/files/archive/1258-Destination%20Canada%27s%20Visitor%20Demand%20Forecast%20Update%20-%20November%202020/DC%20Forecast%20Update%20_Nov%202020_EN%20-%20FOR%20PUBLICATION.pdf

[10] Destination BC. 2020. COVID-19 Tourism Industry Calls May 21,2020. https://www.youtube.com/watch?v=C9toetTbS0M&feature=youtu.be

Exhibit 6: YTD 2020 Tourism Indicators in British Columbia

	Year-to-Date Actuals	YTD % Change Over 2019
International Overnight Visitor Arrivals (January – August)	793,203	-83.2
Provincial Occupancy Rate (January – August)	41.5%	-31.1
Greater Vancouver	39.7%	-50.9
Greater Victoria	38.0%	-48.4
Kamloops	39.2%	-42.9
Kelowna	44.8%	-35.9
Prince George	46.1%	-27.4
Provincial Average Daily Room Rate (January – August)	$154	-17.0%
Greater Vancouver	$157	-30.7%
Greater Victoria	$142	-26.9%
Kamloops	$101	-5.4%
Kelowna	$149	-9.5%
Prince George	$111	-6.6%
YVR Passenger Volume (January – August)	6.03 million	-66.4%
Regional Air Passenger Volume (January – August)	1.76 million	-61.9%
BC Ferries Passenger Volume (January – August)	9.55 million	-38.8%
Provincial Restaurant Receipts (January – July)	$5,03 million	-29.7%

Source: Destination BC Tourism Indicators. November 2020.

Destination Canada's latest international report for COVID-19 impact recovery shows that BC's tourism export revenue loss is estimated to be nearly $4.6 billion (-83%) in 2020 compared to 2019.[11]

2.1 BC Resident Sentiment

During the second wave of COVID-19 (fall of 2020) British Columbian's travel declined from summer months. Destination Canada's Weekly Resident Sentiment Wave 24 (November 17) reports that 59% of BC residents show positive sentiment towards travelling to nearby communities. Fewer feel safe to travel to more distant communities within British Columbia (37%) or in Canada (15%).[12]

While there may be interest to travel to nearby communities, the concerns about the spread of COVID-19 drive Public Health Orders (PHO) on travel and quarantine orders. In November 2020, residents in the Vancouver Coastal Health

[11] Destination Canada. 2020 COVID-19 Impact and Recovery Report: International Summary. https://www.destinationcanada.com/sites/default/files/archive/1285-COVID-19%20Impact%20and%20Recovery%20Report%20-%20International%20Summary%20-%20December%2029%2C%202020/COVID-international-infographic-Dec29_Hyperlinked_EN.pdf

[12] Weekly COVID-19 Resident Sentiment, 2020-10-06, Destination Canada

and Fraser Health regions were ordered to limit social interactions and to not travel outside their communities for non-essential travel; shortly after, travel restrictions and interactions were expanded province wide. While COVID-19 cases, and now COVID variants rise, travel and social interaction restrictions continue to be extended.

2.2 Employment Impacts

At the height of COVID-19 impacts, in April 2020, BC employment dipped by 51% to 167,000 jobs, down from 337,000 jobs in 2019. As expected, tourism unemployment rates were highest in April (29.7%) but declined to 18.1% in August and 10.9% in October.[13]

Compared to 2019 employment, women experienced larger tourism employment declines than men. For example, in April tourism employment for women declined by 18% compared to 7% for men. This trend dampened in August where employment declines for women was 8% compared to 7% for men.

Younger British Columbians experienced larger tourism employment declines than older British Columbians. In August 2020, tourism employment for young people between 15 and 34 years old declined by 12% compared to a decline of 4% for older employees between 35 and 54 years old.[14]

Exhibit 7: Tourism Employment and Unemployment in British Columbia

	April	August	October
Tourism Employment (000s)			
2020	166.8	293.9	296.0
2019	337.0	333.6	334.8
% Change	-51%	-12%	-12%
Tourism Unemployment Rate			
2020	29.7%	18.1%	10.9%
2019	3.9%	2.8%	3.4%

Source: Tourism HR Canada. November 2020. Tourism Employment Tracker. Tourism HR Canada receives customized LFS tables that follow the Tourism Satellite Account's definition[15] of tourism.

[13] Tourism HR Canada. November 2020. Tourism Employment Tracker. https://tourismhr.ca/labour-market-information/tourism-employment-tracker-insights-into-covid-19s-impact/

[14] Tourism HR Canada. November 2020. Tourism Employment Tracker. https://tourismhr.ca/labour-market-information/tourism-employment-tracker-insights-into-covid-19s-impact/

[15] Tourism Satellite Account (TSA) is a standard statistical framework and the main tool for the economic measurement of tourism. Developed by the World Tourism Organization it includes inbound, domestic tourism and outbound tourism expenditure, internal tourism expenditure, production accounts of tourism industries, the Gross Value Added (GVA) and Gross Domestic Product (GDP) attributable to tourism, employment, investment, government consumption, and non-monetary indicators. https://www.oecd.org/cfe/tourism/tourismsatelliteaccountrecommendedmethodologicalframework.htm

2.3 Visitors

Moving forward it is recognized that the greatest barrier to the return of tourism is not COVID-19, but the fear of travel itself. This includes the loss of confidence in travel, fear of other travellers, confusion over rules and regulations, and loss of the joy of travel.

A November 30, 2020 update to a global tracking study by Deloitte found that worldwide, about a third of people feel safe flying (27%) or staying in a hotel (36%), while only 27% are planning to book a hotel for leisure travel in the next three months. In Canada, perceptions of safety are worse, only 19% feel safe flying, 31% feel safe in a hotel, and 17% are planning to book a hotel for leisure travel in the next three months.[16]

The global Anholt-Ipsos Nation Brands Index (NBI) 2020 report notes that when pondering travel in the next five years, a vast majority feel most comfortable traveling domestically rather than internationally. Canada places third amongst the top five nations that travelers feel would be a comfortable place to visit in that same period. This result most likely reflects its high net favorability score in terms of overall response to health crisis management.[17]

Given the disruptions in travel market demand, the losses in business revenues it has created, and the drastic cuts in employment it has triggered, it is critical to instill Covid-19 protocol training and practice in future Indigenous tourism business practices.

---

[16] Deloitte. 2020. Consumer Travel Sentiment Tracking (December 4, 2020) https://www2.deloitte.com/us/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html

[17] https://www.ipsos.com/en-ca/news-polls/handling-health-crises-impacts-overall-favorability-towards-nations

3 ABOUT THE INDIGENOUS TOURISM INDUSTRY AND COMMUNITIES

Understanding the Indigenous tourism labour situation and its relation to First Nations and Indigenous people enables the development of an effective strategy. Any strategy and program require knowledge of the current situation in Indigenous communities, with an understanding of their resources, strengths, needs, challenges, and barriers.

This section covers key areas that promote or hinder Indigenous tourism development and employment both in First Nation communities and of Indigenous people. It describes the housing situation in First Nation communities which are needed to attract and support Indigenous people's return to communities; Indigenous languages which are important to Indigenous cultural tourism development and branding; status of internet connectivity which is needed for training and education, experience bookings and payments, and visitor services; and Indigenous women fertility rates which leads to population development. These factors can also create barriers to employment if employee supports are not available (i.e., daycare), and employer benefits are not offered (i.e., time for caring for their children).

A current analysis of the Indigenous community reveals programs, supports, partnerships and advocacy activities needed to realize Indigenous employment and retention.

3.1 Indigenous Nations and Communities

In British Columbia there are 203 First Nations, of which most are associated with one of the roughly 30 tribal administration organizations. Of these First Nations, there are 316 reserves (see Exhibit 8: Map of BC First Nations). These reserves total 353,324.2 hectares, which covers just over 0.4% of the British Columbia land base[18]. The modern-day treaty making process in British Columbia, which launched in 1993, attempts to rectify the land, resources and governance including returning land to the Indigenous Nations.

Land base is important to Indigenous tourism as it is required to develop a tourism business and provide in-community housing. Some First Nations have one reserve while others have many, for example Taku Tlingit First Nation has 10 reserves totaling 1,264 hectares, Xaxli'p First Nation has 16 reserves totaling 1,572 hectares, and ?Akisq'nuk First Nation (Columbia Lake Indian Band) has one reserve that totals 3,402 hectares (I.R.#3)[19]. The reserves are of varying size, resources, and development potential. Not all reserves are serviced or accessible, and some First Nations reserve land is fully allocated and not available for development.

The location where the main community is situated is referred to as the primary or main community, and other sites are called secondary communities. A secondary community may be situated on the same reserve as the primary community, or on a different reserve. The secondary community may be located several kilometers from the primary community and may not have the same level of community infrastructure or natural resources as the primary community.

[18] BC Treaty Commission http://www.bctreaty.ca/land-and-resources

[19] ?Akisq'nuk First Nation Strategic Land Plan- March 2004, page 2. https://akisqnuk.civicweb.net/document/29429

3.1.1 General Indigenous Population / Indigenous Peoples Profile

According to Statistics Canada (Statistics Canada), in 2016 there were 1,673,785 Indigenous people in Canada. This accounted for 5% of the Canadian population. 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 an estimated 270,580 Indigenous people, representing 16% of Canadian Indigenous people and almost 6% of British Columbia's population.[20,21] This population base is an increase of 16% from 2011 and 38% from 2006. Statistics Canada reports two main factors contributing to this growing Indigenous population: the first being natural growth including 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.[22]

Of these 270,580 Aboriginal people reported residing in British Columbia in 2016, 63.8% (172,520) were First Nations, 33.0% (89,405) were Métis, and 0.6% (1,615) were Inuit people. Within the First Nations population, 72.8% (125,635) had Registered or Treaty Indian status, as defined under the Indian Act.[23]

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 and Nechako (11%), the Cariboo (9%), the Kootenay (4%), and Northeast (4%) regions of the province. Overall, it is estimated that 30% of Indigenous peoples in British Columbia live in rural areas (Exhibit 9).[24]

Throughout Canada, there has been a steady increase for several decades of the urban Indigenous population. 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.[25]

---

[20] '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'.

[21] 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).

[22] 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

[23] Statistics Canada, Focus on Geography Series, 2016. https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-PR-Eng.cfm?TOPIC=9&LANG=Eng&GK=PR&GC=59

[24] 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

[25] 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

Exhibit 8: Map of BC First Nations

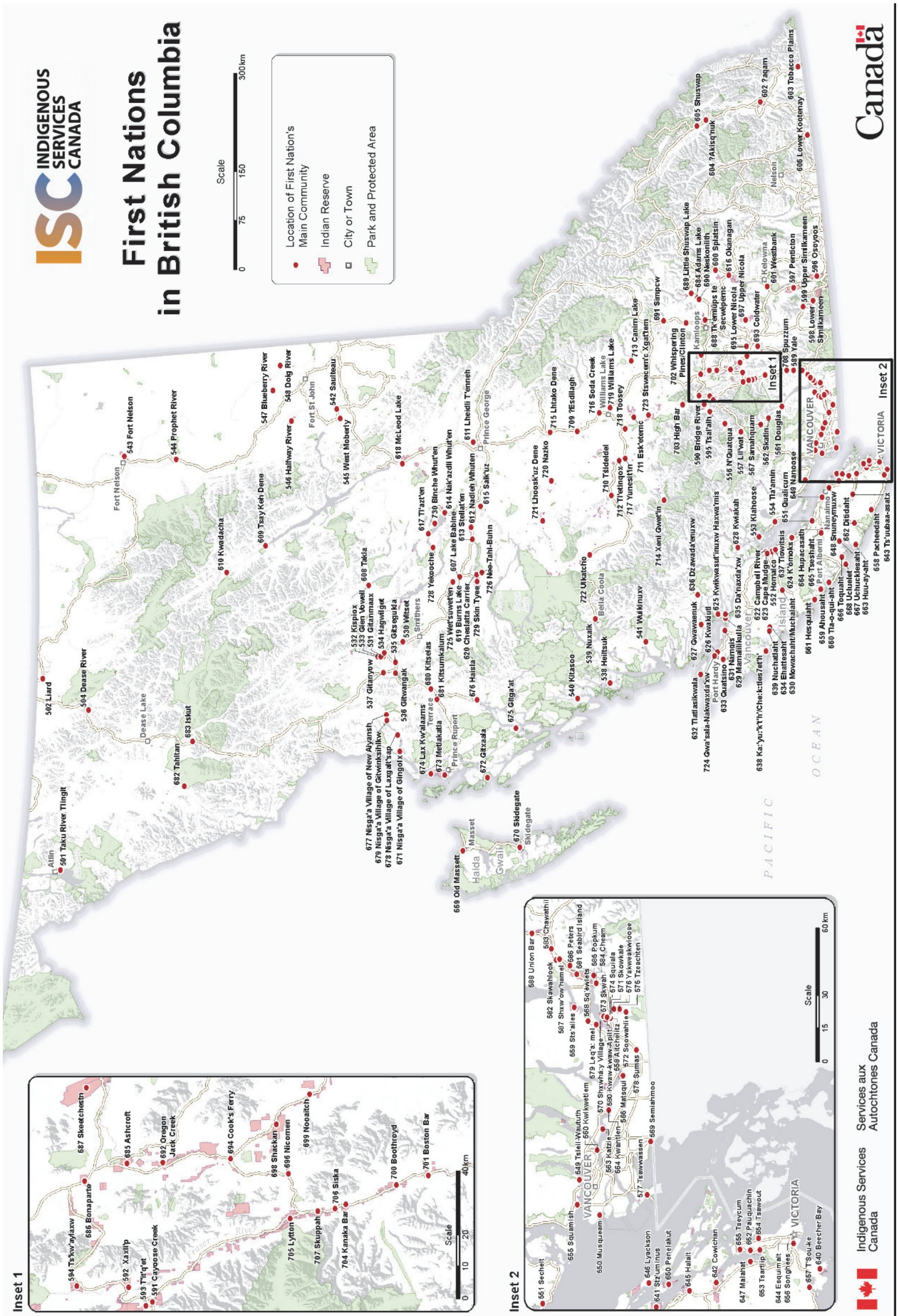


Exhibit 9: BC Indigenous and Non-Indigenous Populations 2016

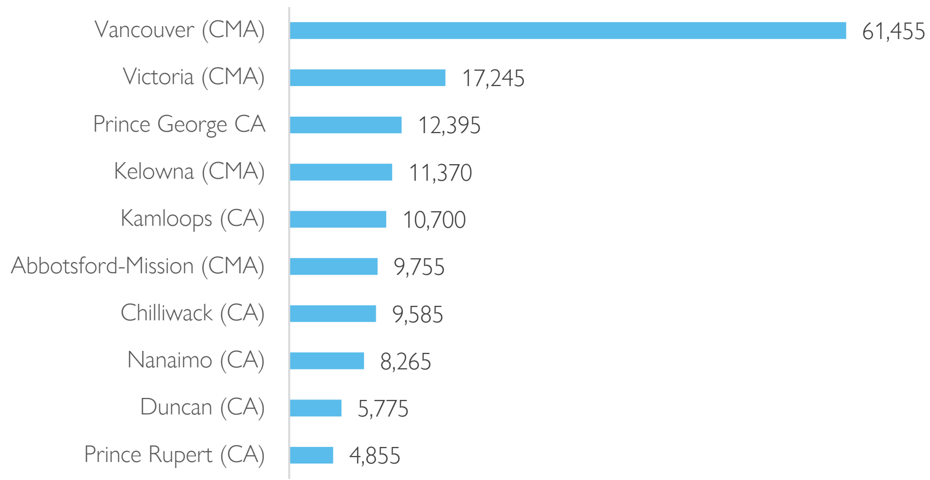
Economic Development Region	Indigenous Population		Non-Indigenous Population	
	Indigenous Population	Indigenous % of Total	Non-Indigenous Population	Non-Indigenous % of Total
Mainland / Southwest	90,735	34%	2,695,215	63%
Vancouver Island / Coast	60,850	22%	718,750	17%
Thompson-Okanagan	45,060	17%	487,625	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%
Total	**270,590**	**6%**	**4,289,680**	**94%**

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

In 2016, 52% of BC's Indigenous population were female (male 48%); similar to the proportion of the non-Indigenous female population (51%).

The Vancouver census metropolitan area (CMA) contains the highest Aboriginal population (41%) of the CMA areas in British Columbia. Other lower but significant concentrations are in Victoria (11%), Prince George (8%), Kelowna (8%), Kamloops (7%), Abbotsford-Mission (6%), Chilliwack (6%). In fact, 53% of the BC Aboriginal population reside in the greater Vancouver and Fraser Valley areas. (Exhibit 10)

Exhibit 10: Top 10 Census Metropolitan Areas and Census Agglomerations by Aboriginal Identity, BC, 2016

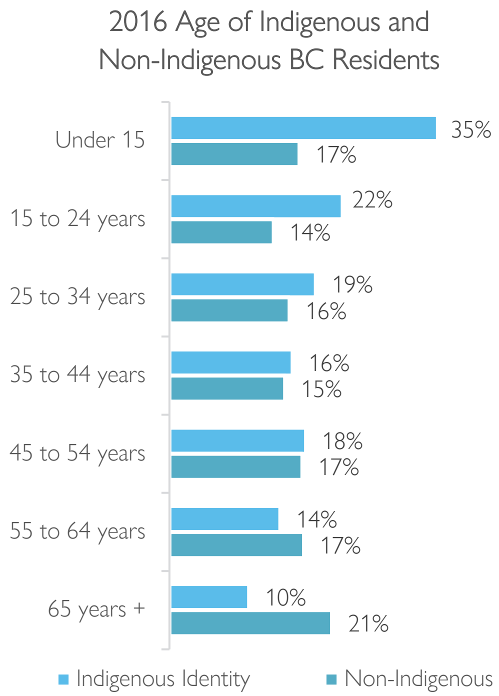


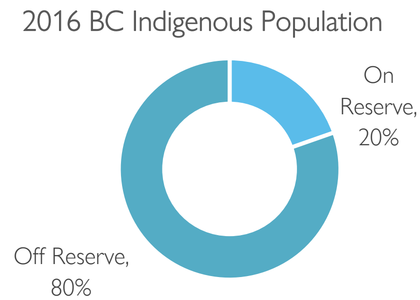
Source: Statistics Canada, https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-PR-Eng.cfm?TOPIC=9&LANG=Eng&GK=PR&GC=59

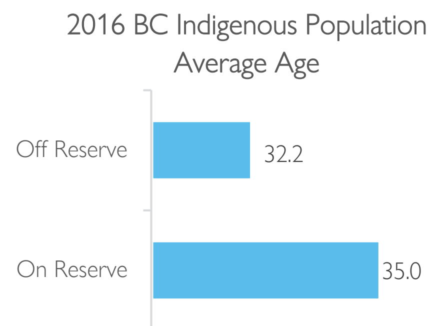
The Indigenous population in BC is young and growing, with 35% of Indigenous people in 2016 being under the age of 15, and 22% aged between 15 and 34 years of age. This compares with 17% and 14% of the non-Indigenous population in these age groups. The average age of Indigenous people in BC is 32.8 years old, roughly a decade younger than the non-Indigenous population (42.4 years, Exhibit 11).

The average age of First Nation people was 31.8 years; 34.5 years for Métis, and 28.5 years for Inuit. However, the British Columbia average Aboriginal age in 2016 was slightly higher at 32.8 years, compared with 42.4 years for the non-Aboriginal British Columbia population. When residency is considered – about 20% of the Indigenous population live on-reserve, while the remainder live off reserve – the off-reserve age is slighted younger at 32 years to those living on-reserve at an average age of 35 years.

Exhibit 11: BC Indigenous Population 2016 – Age and Residency[26]







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 also 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.[27]

[26] Statistics Canada. 2018. Aboriginal Population Profile. 2016 Census.

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

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. About 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%).[28]

"Aboriginal women who were early mothers were less likely to have a high school diploma."

"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%). In addition, the share of Indigenous women lone parents is highest on-reserve (22%) compared to those living off-reserve (18%).

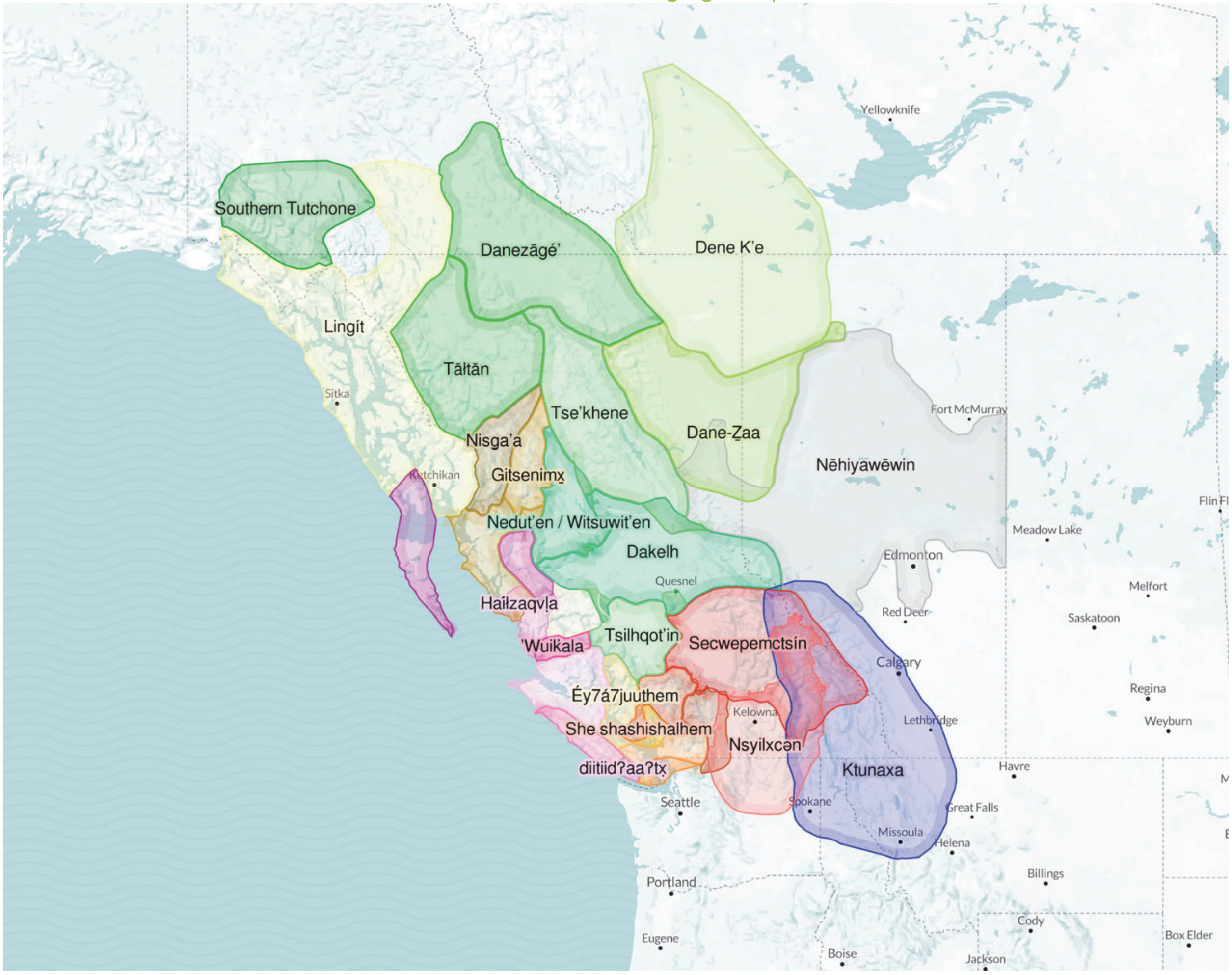
3.1.2 Indigenous Nations Language and Culture

There are more than 70 Indigenous languages spoken across the country, of which 34 are spoken in British Columbia. There are around 90 dialects of these language families. Some languages, such as the Ktunaxa (Kootenai), are isolate languages that are spoken nowhere else in the world. All the Indigenous languages spoken in what is now called British Columbia are represented in the First Peoples Cultural Council website (www.fpcc.ca), which lists programs that support the preservation of First Nations cultures, language and heritage. It includes a Youth Empowered Speakers program (YES)[29]. Connected to First Peoples is the First Voices website which offers a suite of web-based tools and services designed to support Indigenous people engaged in language archiving, language teaching and culture revitalization, and is a source for hearing and learning the First Nation languages.

[28] 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

[29] First Peoples Cultural Council – the FPCC Youth Empowered Speakers (YES) program is for BC First Nations youth between the ages of 18-30 who want to become fluent in their language while pursuing a career in language revitalization.

Exhibit 12: First Nations Languages Map of BC



Source: https://fpcc.ca/first-peoples-map/

In the 2016 Statistics Canada Census, the Algonquian language has the largest number of speakers at 175,825. Of the Algonquian languages, those most often reported were Cree languages (96,575), Ojibway (28,130) and Oji-Cree (15,585). Dialects of Algonquian are also spoken in British Columbia, primarily in the north. While the largest number of Aboriginal languages are spoken in British Columbia, five of the Aboriginal language families (Salish, Tsimshian, Wakashan, Haida and Kutenai/Ktunaxa) were primarily found in British Columbia. British Columbia is home to a large number of Aboriginal languages; however, many have relatively few speakers, and all languages have fewer than 1,500 speakers.

Exhibit 13: Aboriginal Languages Spoken in British Columbia, Stats Canada 2016

Aboriginal language families and main languages	Speaker Population	% of Speaker in British Columbia
Athabaskan languages	23,455	18.4%
Gitxsan (Gitksan)	1,285	98.1%
Haida	445	98.9%
Kutenai	170	100.0%
Kwakiutl (Kwak'wala)	585	98.3%
Salish languages	5,620	98.8%
Shuswap (Secwepemctsin)	1,290	98.4%
Tlingit	255	21.6%
Tsimshian languages	2,695	98.1%
Wakashan languages	1,445	98.6%

The list does not break down all the dialects within that language family or dialect.
Source: Stats Canada, 2016 Census https://www12.statcan.gc.ca/census-recensement/2016/as-sa/98-200-x/2016022/98-200-x2016022-eng.cfm

The language of Métis people is Michif, which has a base of both Cree and French languages. In 2016, 1,170 people across Canada reported speaking Michif well enough to conduct a conversation. These speakers are concentrated mainly in Saskatchewan and Manitoba.

From 2006 to 2016, there was a decline in the number of Aboriginal people across Canada that could conduct a conversation in an Aboriginal language. It shifted from 21.4% in 2006 down to 15.6% in 2016. Interestingly, the 2006 Census reports "the number of Aboriginal people who can speak an Aboriginal language is higher than the number who have it as a mother tongue."[30]

> "The number of Aboriginal people who can speak an Aboriginal language is higher than the number who have it as a mother tongue."
> Statistics Canada, 2016 Census

The 2016 Statistics Canada Census also revealed:

- Older First Nations and Métis people were more likely to be able to speak an Aboriginal language than their younger counterparts.
- One in three First Nations seniors (33.3%) reported having an Aboriginal mother tongue in 2016, by comparison, about 1 in 10 First Nations children aged 0 to 14 (10.7%) had an Aboriginal mother tongue.
- Seniors aged 65 and older were most likely to speak an Aboriginal language.
- Less than 2% of Métis speak an Aboriginal language.

[30] Mother tongue is defined as the first language learned at home in childhood and still understood.

3.1.3 Indigenous Housing, Households, and Homelessness

Housing was identified by Indigenous and non-Indigenous employers as a barrier to attracting labour to their area, as well as by Indigenous people to finding employment. A variety of housing challenges exist. Some of the more significant housing issues, from a tourism employment perspective, include availability, capacity, affordability, quality, and proximity to place of employment. However, in Indigenous communities these are also paired with poor housing conditions for their citizens who reside on or off reserve, and other community infrastructure barriers like drinkable water, availability of cellular and internet services.

On-reserve Housing and Aboriginal Households

Indigenous Services Canada (ISC) and Canada Mortgage and Housing Corporation (CMHC) are the primary supporters of First Nation on-reserve housing. In British Columbia, housing for off-reserve Aboriginal people is typically led by urban Aboriginal organizations with funding support from BC Housing.

Data concerning a variety of housing indicators is compiled by the CMHC National Housing Strategy (NHS). Its 2016 data[31] concerning on-reserve Aboriginal housing reports that 106,135 households existed on-reserve of which 91,595 (86%) of them were Aboriginal households. In British Columbia there were 30,080 households of which 17,690 (59%) were Aboriginal. An Aboriginal household is defined as "a non-family household in which at least half of the household members self-identified as an Aboriginal person or a family household in which at least one spouse, common-law partner or lone parent self-identified as an Aboriginal person, or at least half the household self-identified as an Aboriginal person."

It is important to recognize the higher number of non-Aboriginal households in British Columbia than in other areas of Canada. Non-Aboriginal households are usually market housing that generates sales and tax revenue which is then used by the Band for economic development, social and infrastructure services. Market housing though is a business and must prove its feasibility to be built, which is spurred from buyer demand in attractive geographic settings. Consequently, Bands in urban settings more often have residential developments tagged as non-Aboriginal households, such as the greater Vancouver area, Victoria, Kelowna, Kamloops, and Osoyoos. The climate of British Columbia First Nations is different than in other regions in Canada, subsequently it stimulates higher non-Aboriginal households. These high numbers are likely driven two factors – Treaties and Indian Taxation authority over on-reserve land use – which empower First Nations through greater autonomy, influence, resources, and ability to attract partners for housing development.

Of the Aboriginal households on-reserve in Canada in 2016, 19% were in British Columbia with two-thirds located in rural areas (66%) and one-third in urban areas (34%). British Columbia Aboriginal household ownership differed from the rest of Canada as most Aboriginal only households in British Columbia were Aboriginal owned (59%) versus 32% in the rest of Canada, in contrast 59% are Band Owned in the rest of Canada compared to only 27% being Band Owned in British Columbia Rented homes are similar in Canada and British Columbia at 10% and 13% respectively. (Exhibit 14)

[31] All Aboriginal households data sourced and definitions in housing from CMHC https://www.cmhc-schl.gc.ca/en/data-and-research/data-tables/census-appendix-housing-conditions-on-reserve-aboriginal-households

Exhibit 14: On-Reserve Housing Conditions – Number of households on reserve, Aboriginal only

Aboriginal Households	All	Owned	Rented	Band Owned	All	Owned	Rented	Band Owned
Canada	91,595	28,860	9,075	53,670	100%	32%	10%	59%
Urban areas	16,495	8,650	2,000	5,855	18%	52%	12%	35%
Rural areas	75,095	20,205	7,075	47,815	82%	27%	9%	64%
BC	17,690	10,495	2,360	4,835	19%	59%	13%	27%
Urban areas	5,955	3,790	875	1,290	34%	64%	15%	22%
Rural areas	11,735	6,705	1,485	3,545	66%	57%	13%	30%

Source: 2016 CMHC (NHS-based housing indicators and data), https://www.cmhc-schl.gc.ca/en/data-and-research/data-tables/census-appendix-housing-conditions-on-reserve-aboriginal-households

Household Income and Employment

The largest proportion of Aboriginal household maintainers (46.4%) were 45 to 64 years in British Columbia in 2016. The next most prevalent (27.5%) groups were 30 to 44 years (27.5%) of age, followed by those 65 years and over (16.6%). While persons of 45 to 64 years were more often owners of households, they were also the largest age group in Band Housing (43.4%). Primary maintainers between 30 to 44 years represented 40.8% of rented households, while maintainers age 15 to 29 years were more likely (18.2%) to be in rented houses.

In on-reserve Aboriginal households, about 37% of the primary household maintainers were employed full-time, 8% were employed part-time, and 53% were either not in the labour force or unemployed. A slightly higher rate of household maintainers in rural areas were not working (54%). Primary household maintainers not working were more often living in Band housing in rural (60%) than urban (56%) areas.

The average household income was $42,798 and the average income per person was $15,954 in 2016. Aboriginal households in urban areas though was $48,319, almost $10,000 more than their rural area counterparts at $39,997. The average income per person was $17,922 for urban area and $14,955 for rural area persons. The major source of household incomes for Aboriginal households in British Columbia was 55.3% earned through wages and salaries, 41.0% from government transfer payments, and 3.6% from other sources of income. Persons in urban areas were slightly more likely to earn their income through wages and salaries (56.1%) than their rural area counterparts (55.0%) who also had a higher dependence on government transfer payments (42.2% rural versus 38.5% urban areas).

Housing Age and Overcrowding

The housing supply on-reserve is aging, with fewer Aboriginal houses built in the period from 2006 to 2011 in British Columbia. The average rate was 8.8% on-reserve compared to the average Aboriginal household rate in Canada of 15.3%). In British Columbia, nearly half (44.3%) of on-reserve Aboriginal houses were built between 1981 to 1996, a further 21.0% were built between 1996 to 2006.

The average persons living in Aboriginal households was 3.71 persons. Of all Aboriginal households the relationship status of residence was: 45% were family households / couples, another 21.5% were lone-parent households, 8.4% were multiple family member households, and 24.9% were non-family households.

There are two Indigenous led organizations involved with improving the housing situation and living conditions for Aboriginal people in BC – the Aboriginal Housing Management Association (AHMA) and the First Nations Housing and Infrastructure Council (FNHIC). The AHMA worked with the Aboriginal housing agencies that build and maintain housing for Indigenous people in BC, both on and off-reserve, and for all Indigenous regardless of status. The FNHIC is organizing to take over management of federal housing and infrastructure on First Nation communities.

Off-Reserve and Homelessness

While the rate of increase in the availability of Aboriginal households on-reserve appears to be declining, Aboriginal people in urban Canadian centres are eight times more like to experience homelessness compared to the general homeless population. The 2018 BC Homeless Count reported that of the 7,655 homeless people participating in the study, Indigenous people were 38% of the homeless population, despite Indigenous persons comprising 6% of the provincial population.

1 in 15 urban Aboriginal people are homeless compared to 1 in 128 for the general population.[32]

The main barriers to accessing housing in British Columbia were 53% rent too high, 51% income too low, and 30% no available suitable housing. Of the homeless, 15% were youth and 20% were seniors. Of these homeless people 29% had been in either foster care, a youth group home, or under a youth agreement.[33]

The Canadian Observatory on Homelessness[34] identified several factors that contribute to homelessness.

- The 60's Scoop – which took Indigenous children and placed them in white foster homes within a child welfare system that has led to unstable families and homes.
- Personal Issues – faced by Indigenous peoples, such as familial dysfunction, substance use, addictions, health issues, community violence.
- Structural Issues – include transitions from reserves to urban living, racism, landlord discrimination, low levels of education and unemployment, which collectively contribute to Aboriginal people experiencing lower levels of education, poorer health, higher rates of unemployment and lower income levels compared to non-Indigenous people.
- Social Issue Traumas – including ensuing high incarceration rates and high suicides rates amongst youth.

[32] Canadian Observatory on Homelessness – homeless hub – https://www.homelesshub.ca/about-homelessness/population-specific/Indigenous-peoples

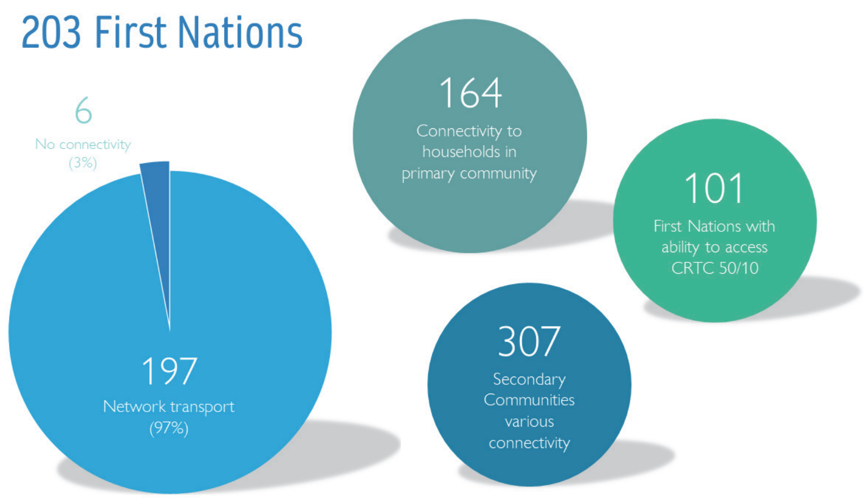
[33] 2018 Report on Homeless Counts in B.C. prepared by Homelessness Services Association of BC, Urban Matters and the BC Non-Profit Housing Association, December 2018, page 7. file:///C:/Users/BEVERL~1/AppData/Local/Temp/2018-BC-Homeless-Counts.pdf

[34] Canadian Observatory on Homelessness. https://www.homelesshub.ca/about-homelessness/population-specific/Indigenous-peoples

3.1.4 Indigenous Community Internet Connectivity

As of fall 2020, the 203 First Nations in British Columbia, 197 (97%) have 'Network Transport' internet access. Network transport is where the necessary infrastructure, such as fibre optic connections, have been laid along the highway close to the community. Connectivity is funded by the federal and provincial governments through the Pathways to Technology[35] program which is managed by the All Nations Trust Company (ANTCO). Pathways was setup to bring affordable and reliable high-speed Internet to all First Nations in British Columbia. The CRTC 50/10 high speed standard is 50Mbps download, 10Mbps upload speed. However, the Pathways to Connectivity program that supports First Nations connectivity is at the lower 2008 high-speed standard. The CRTC goal is to have 100% of First Nation communities with consumer grade connectivity or better by 2021.

Exhibit 15: BC First Nations Internet Connectivity



Of these 197 First Nations (Exhibit 15) with network transport:

- 164 have internet connectivity available to the households in their primary community, and 33 only have access in the main building in the community;
- 101 have the ability to access the CRTC 50/10 broadband standard; and
- 102 First Nations require upgrade to access this new standard speed.

In addition to 197 First Nations primary community connectivity, there are 307 secondary communities that have various connectivity; these secondary locations may be on the primary reserve or another reserve.

While communities have internet infrastructure, it does not mean they are connected, or that all the community households have internet access. Pathways reported there are real barriers to internet connectivity. First there is the

[35] Pathways to Technology is a program managed by the All Nations Trust Company, situated in Kamloops, BC. Pathways is an initiative to bring affordable and reliable high-speed Internet to all 203 First Nations in BC. https://www.antco.ca/companies/all-nations-trust-company/pathways-to-technology

natural geography and climatic conditions of British Columbia which prevents satellite from being an option to connecting communities. Then within the communities themselves, other barriers include:

- Affordable monthly internet charges;
- Ongoing repairs and maintenance of internet infrastructure;
- Capital upgrades to meet growing bandwidth demands; and
- Training and support to maintain and operate the system.

Affordability is a larger problem in remote and isolated communities where there are limited internet suppliers and suppliers do not offer competitive rates. Pathways connects the community yet is not involved in supplier pricing or whether a household gets connected. Households must be able to afford to be connected, and have a computer to access the internet.

Prior to the COVID-19 pandemic, internet connectivity was a needed service for Indigenous communities and businesses to be competitive. Since the pandemic, connectivity has become an essential service for:

- Health care
- Education and skills development
- Cultural Preservation and Revitalization
- Economic Development
- Land and Resource Management
- Critical Infrastructure Monitoring
- Band Management
- Businesses to operate and compete

For Indigenous tourism, internet connectivity is vital for modern tourism businesses to raise awareness through marketing and advertising activities, to provide location information and other trip / visitor planning information, to take visitor reservations, respond to consumer and travel trade inquiries, make retailer sales, and to provide consumers with internet access while on their vacation.

3.1.5 Transportation and Driver's Licence

Lack of transportation and not having a driver's licence are common barriers identified to employment. The Statistics Canada Aboriginal Peoples Survey (APS) of 2016 profile Aboriginal people's employment in Canada and barriers to that employment. In British Columbia, 44% of respondents said that not having the access to transportation to get to available jobs caused them difficulty in finding work. This was also a significant barrier in Saskatchewan (51%), as well as Atlantic Canada (28%[E]), Quebec (29%) and Ontario (33%).[36]

Indigenous Skills Employment Training (ISETs) throughout British Columbia recognize this as a barrier to employment. Subsequently many ISETs offer Driver's Licence training, such as that provided through the ACCESS Aboriginal Community Career Employment Services Society (ACCESS) in West Vancouver that partnered with the Vancouver Aboriginal Friendship Centre Society to offer this training to youth. Industry sectors have also partnered with First

[36] Statistics Canada Aboriginal Peoples Survey – https://www150.statcan.gc.ca/n1/pub/89-653-x/89-653-x2018003-eng.htm

Nations and Indigenous ventures to increase the number of Indigenous people with driver's licences. Haisla Nation with All Nations Driving Academy partnered with the province of British Columbia to provide driver training in the north. All Nations Driving Academy owner Lucy Sagar believes that 50% of First Nations adults have a valid driver's licence, but with some First Nations having as few as 5%.[37]

3.1.6 Indigenous Employment Profile by Statistics Canada

There are several studies on Indigenous employment in Canada which identify who is employed, what type of employment they possess and the barriers they face in gaining appropriate jobs. The Statistics Canada Aboriginal Peoples Survey (APS) of 2016 profiled Aboriginal employment throughout Canada. Some of the key findings of the APS that relate to this project – Indigenous employment and Self-employment in British Columbia – are listed below.

Exhibit 16: Statistics Canada Aboriginal Peoples Survey 2016 – Employment Profile

- Among employed First Nations people, women were more likely to work multiple jobs – Less than one in ten (8%) employed First Nations people worked multiple jobs. Women were more likely to do so than men (9% versus 6%).
- Preparing for retirement – About 44% of First Nations people living off reserve were preparing for their retirement on their own or through an employer pension plan.
- Self-employment – Over one in ten (11%) employed First Nations people living off reserve were self-employed in 2017. Employed men were more likely to be self-employed (13%) than employed women (8%).
- Self-employed off reserve – 11% of employed off reserve First Nations people aged 15 years or older were self-employed in 2017 in British Columbia.
- Almost a third of self-employed First Nation people had employees – While 30% of self-employed First Nations people had employees, self-employed men were more likely to have hired employees (36%) than women (21%[E]).
- No assistance for self-employed – Most self-employed (88%) First Nations people did not receive outside assistance for their business.
- Part-time employment – About one in five (21%) employed First Nations people living off reserve worked part-time (less than 30 hours per week at their main job).
- Part-time employment for women – Women were more likely to work part-time than men (27% versus 14%). Younger First Nations people were more likely to work part-time (43%) than core working age adults (14%) or older adults (22%).[38]
- Part-time employment not a choice – For nearly a third (31%) of First Nations people working part-time, part-time work was not a choice. About a quarter (24%) of young First Nations people, 36% of core working age adults and 34% of older adults who worked part-time, did so involuntarily.

---

[37] Vancouver Sun, "Indigenous drivers and the road to reconciliation" – Lucy Sagar, November 23, 2018. https://theprovince.com/opinion/op-ed/lucy-sager-Indigenous-drivers-and-the-road-to-reconciliation

[38] Core Aboriginal Peoples Survey – defines three groups in its labour market profile. 'Younger / Young adults' are aged 15 to 24. 'Core working age adults' are aged 25 to 54. 'Older adults' are those aged 55 or older. https://www150.statcan.gc.ca/n1/pub/89-653-x/89-653-x2018003-eng.htm

- Caring for children – is a leading reason for working part-time among core working age women. About one-fifth (19%[E]) of core working age women who worked part-time reported doing so because they were caring for their children.
- Part-time employment to attend school – Over half (58%) of young First Nations people who worked part-time did so to attend school, compared with 13% of core working age adults. Across provinces and territories, the percentage of young First Nations people who worked part-time because they were attending school ranged from 84% in the Northwest Territories to 45% in Alberta.
- Other labour activities – About six in ten First Nations people living off reserve participated in other labour activities during the past year. Other labour activities contribute to economic well-being that may not be captured with conventional measures. For example, the APS identified other activities that contribute to livelihoods such as hunting, fishing, and trapping, gathering wild plants, making clothing or footwear, and making carvings, jewelry, and other kinds of artwork. Most (59%) First Nations people over the age of 15 participated in these other labour activities during the last year. Six percent of First Nations people aged 15 or older reported doing other labour activities for money or to supplement their income in 2017. First Nations people who were unemployed were more likely to have done these activities for income (10%), than those who were employed (6%) or otherwise not in the labour force (5%). In British Columbia, 28% hunted, fished or trapped, 30% gathered wild plants, 9% made clothes or footwear, and 26% made carvings, drawings, jewelry, or other kinds of artwork.
- Helping in Communities – Most off-reserve First Nations people (72%) helped out in their community at least once per month during the past 12 months.
- Off reserve unemployment rate – The unemployment rate among off reserve First Nations people was 15% (43,655 individuals) in 2016. The unemployment rate was higher among men (17%) than women (14%). Rates varied by age group with higher unemployment levels occurring among young First Nations people (23%) than core working age (13%) or older adults (13%). Unemployment rates varied with level of education and were lower among First Nations people with a university degree (7%) than among those with a high school diploma (16%) or those with less than a high school diploma (25%).
- Job shortage – A shortage of jobs was the most commonly experienced barrier to employment. This job shortage was more commonly experienced by unemployed First Nations people in Alberta (80%) and in the Yukon (77%), and British Columbia (61%).
- Education barrier to women employment – Women were more likely to report not having enough education or training for available jobs. About half (51%) of women compared with 40% of men reported that not having enough education or training for available work made it difficult to find work.
- Young people differ from older aged people – Challenges experienced by young First Nations people in finding work differed from older age groups. Not possessing enough work experience for available jobs was reported by a higher share of young First Nations people (59%) than core working age adults (45%) or older adults (27%). Similarly, young First Nations people were more likely to have had difficulty finding work because they did not know what type of job to look for (41%) than core working age adults (22%) or older adults (9%).

Source: https://www150.statcan.gc.ca/n1/pub/89-653-x/89-653-x2018003-eng.htm

In this APS 2017, Aboriginal people in British Columbia reported a shortage of jobs (61%) as the most common reason for being unemployed, with males (65%) indicating this reason more frequently than females (58%). Not having the work experience (52%) was the second most common reason, followed by not having enough education or training (49%), then not having the means of transportation (41%).

Exhibit 17: Reasons for difficulty in finding work by Aboriginal identity, unemployed in British Columbia

Barriers to employment	% All	% Male	% Female
A shortage of jobs	61	65	58
Not having the work experience	52	52	52
Not having enough education or training	49	52	47
Not having the means of transportation	41	46	36
Not knowing the type of job one wanted	27	28	27
Other	21	17	25
Not knowing where to look for work	18	*	18
*Data too unreliable to publish			

Source: Aboriginal Peoples Survey, 2017.
https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=4110001401&pickMembers%5B0%5D=1.9&pickMembers%5B1%5D=3.1&pickMembers%5B2%5D=5.2&pickMembers%5B3%5D=6.2

3.1.7 COVID-19 Impact on Indigenous Communities

The COVID-19 virus has been the most devastating force on the tourism industry, globally in Canada, British Columbia and for Indigenous tourism in 2020. In previous years, several areas throughout British Columbia were harmed by uncontrollable forces like wildfires, and seasonal floods. During extreme weather, remote and isolated communities are likely to: be closed and shut off from transportation, lose electricity and communications resulting in food insecurity, and experience health and safety risks. For instance, these unanticipated declines were evident in places such as Williams Lake during the wildfires of 2017, and Klemtu / Kitasoo (home of the Spirit Bear) when extreme weather stopped the delivery of food and other essential items.

At the regional discussions, focus groups and one-on-one interviews, Indigenous operators shared the impact of these natural disasters and the COVID-19 pandemic on their business. Some reported they intended to pursue asset replacement and / or addition of equipment and other infrastructure to increase workplace safety, improve business operation efficiencies, and fulfill visitor interests, and enhance visitor experiences. However, now that they were contending with COVID-19 in addition to wildfire and flooding, they were uncertain if they will be able to complete the intended improvements and expansions… and any others that may be infrastructure and operations changes required to operate during COVID-19.

The First Nations Health Authority and the BC Assembly of First Nations (BCAFN) track the impact of COVID-19 on British Columbia First Nations which is distributed by the BCAFN via email. "As of November 18, 2020, the total number of First Nations COVID-19 cases is 898… there are 162 active First Nations COVID-19 cases, 31 of the active cases were in or near community."[39] Since the beginning of the pandemic and to this date, there have been 13 COVID-19 related deaths reported amongst First Nations living in BC. First Nations have responded by implementing emergency measures which included closing communities, erecting signs, distributing personal protective equipment as

[39] BCAFN COVID-19 Weekly News Bulletin – November 27, 2020.

well as food and safety kits, promoting safety measures, and checking in on community members – especially the Elders, and deploying Health Safety Workers.

British Columbia First Nations Community statistics from Indigenous Services Canada (ISC) as of November 19, 2020[40] reported several COVID-19 related community responses:

- 144 Band Office Closures
- 120 First Nations Emergency Operation Centres
- 65 Declared State of Local Emergency
- 115 Community closures

Since November 2020, the number of COVID-19 cases in First Nation communities and amongst Indigenous people have continued to increase and in several communities rise sharply.

In addition, and like many rural areas in British Columbia, ensuring food security and the delivery of essential goods, have become priority activities for Indigenous communities since the arrival of COVID-19.

When First Nations closed their communities this also shuttered the tourism businesses within reserve boundaries. Indigenous tourism businesses located off-reserve were able to continue operations once authorized by the British Columbia Public Health Orders (PHO), and if owned by a First Nations, approved by Band Council for re-opening.

The ITBC Emergency Relief Fund program which launched at the start of the pandemic enabled Indigenous tourism operators to enhance their operations, especially with respect to marketing channels (i.e., website, online sales). By May 2020, ITBC distributed funds to 71 Indigenous tourism businesses. Following the ITBC program a national Indigenous business COVID-19 stimulus funding program secured by the National Aboriginal Capital Corporations Association became available.

Of the Indigenous tourism businesses, the accommodations sector, and especially campgrounds were one of the early leaders to reopen, then followed by Outdoor Adventures and Tours. Food and Beverage services (i.e., restaurants) experienced stronger restrictions which in small venues essentially ruled out service. Attractions though have been unable to return to full operations with many being restricted from opening due to the PHO.

In contrast, retail gift stores that were able to convert to online sales realized nominal gains at least to a level that enabled them to maintain some level of operations.

Gas Station operations were less impacted by COVID-19, as they were classified as an 'essential service'. Of the 25 gas stations surveyed, 24 (96%) of them remained open, with few staff layoffs or operating hours adjustments. Most were able to retain near full operations, and the one that closed, re-opened after an initial closure.

Of the 21 Festivals and Events contacted, all were cancelled in 2020. While this sector typically relies on volunteers for planning and operations, it is a key element to promoting Indigenous culture, provides community organizations and initiatives such as Elders group and youth sports with opportunities to raise funds, and buy goods and services from

[40] BCAFN COVID-19 Weekly News Bulletin - November 27, 2020.

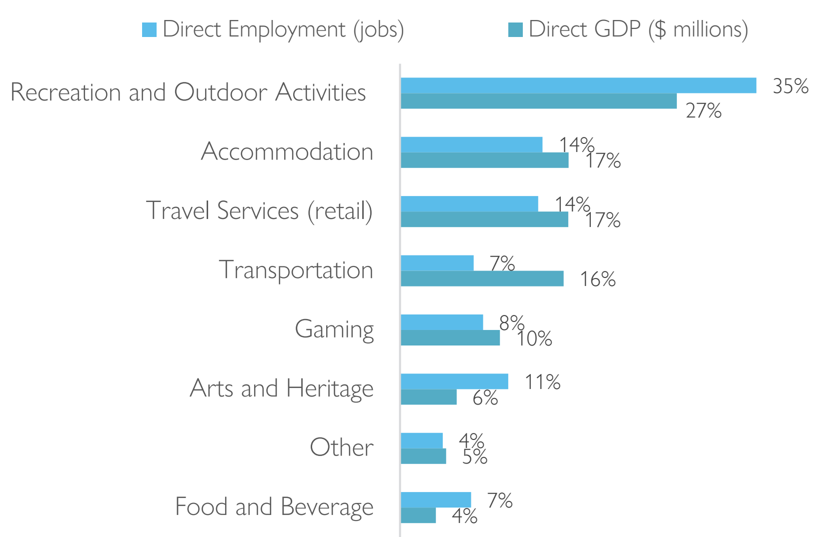
small business like cultural services like pow-wow announcers and performers, security contractors, and specialty products like rodeo stock contractors.

Overall, many of the Indigenous tourism operators contacted requested information and training on COVID-19 safety protocols, as well as signage, as well as a range of business funding supports.

3.2 Value of Indigenous Tourism

In 2018, the Indigenous Tourism Association of Canada (ITAC) contracted The Conference Board of Canada to conduct research into the current state of the Indigenous tourism industry in Canada. This research demonstrated that the Indigenous tourism sector was growing at a rapid rate, outpacing the overall Canadian tourism growth. The direct economic benefits (Gross Domestic Product, 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 revealed recent and unprecedented acceleration of the Indigenous tourism businesses across the country (Exhibit 18).[41]

Exhibit 18: 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

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 (Exhibit 18).

[41] 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

In terms of direct economic impact, British Columbia 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, British Columbia exceeded $1,271 million in output (equivalent to GDP of $970 million).[42]

In 2017, the Indigenous tourism sector in Canada collected $3.79 billion in tourism revenues and $1.74 billion in GDP. For British Columbia, this equals $524 million in tourism revenues and $260 million in GDP (Exhibit 19). Of all the provinces, Ontario had the largest direct economic impact of Indigenous tourism[43] followed by British Columbia, Alberta, Quebec, and Saskatchewan.

Exhibit 19: Indigenous Tourism Economic Impacts 2017

	BC	Canada
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

3.3 Indigenous Tourism Demand

Before the COVID-19 pandemic, the global demand for Indigenous tourism experience was rising. This was 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'.[44]

"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."[45]

[42] Conference Board of Canada. 2019. Canada's Indigenous Tourism Sector. Insights and Economic Impacts.

[43] As measured by GDP and revenues.

[44] 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

[45] Tourism New Zealand. 2017. About the Tourism Industry. https://www.tourismnewzealand.com/about/about-the-tourism-industry/m%C4%81ori-tourism/

Canada and British Columbia continued to exceed expectations as more international visitors sought authentic experiences. The Destination Canada Global Tourism Watch (GTW) series of market studies 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 indicated:[46]

- 1 in 3 international visitors to Canada are interested in Indigenous tourism experiences (37%).
- The interest, participation and those motivated to experience Indigenous tourism differed by market.
- Analysis of past visitors to Canada revealed there was a high incidence of participation in Indigenous experiences by visitors from France, Germany, India, Mexico, and China.
- Visitors from France (63%) and Germany (47%) were most likely to be interested in Indigenous tourism experiences.
- 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 show 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.

For potential visitors to Canada, Indigenous tourism was highest as a motivating activity for 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%, Exhibit 20). Of these international visitors, and given the sheer number of visitors, the American market show the most potential for British Columbia's Indigenous tourism sector.[47]

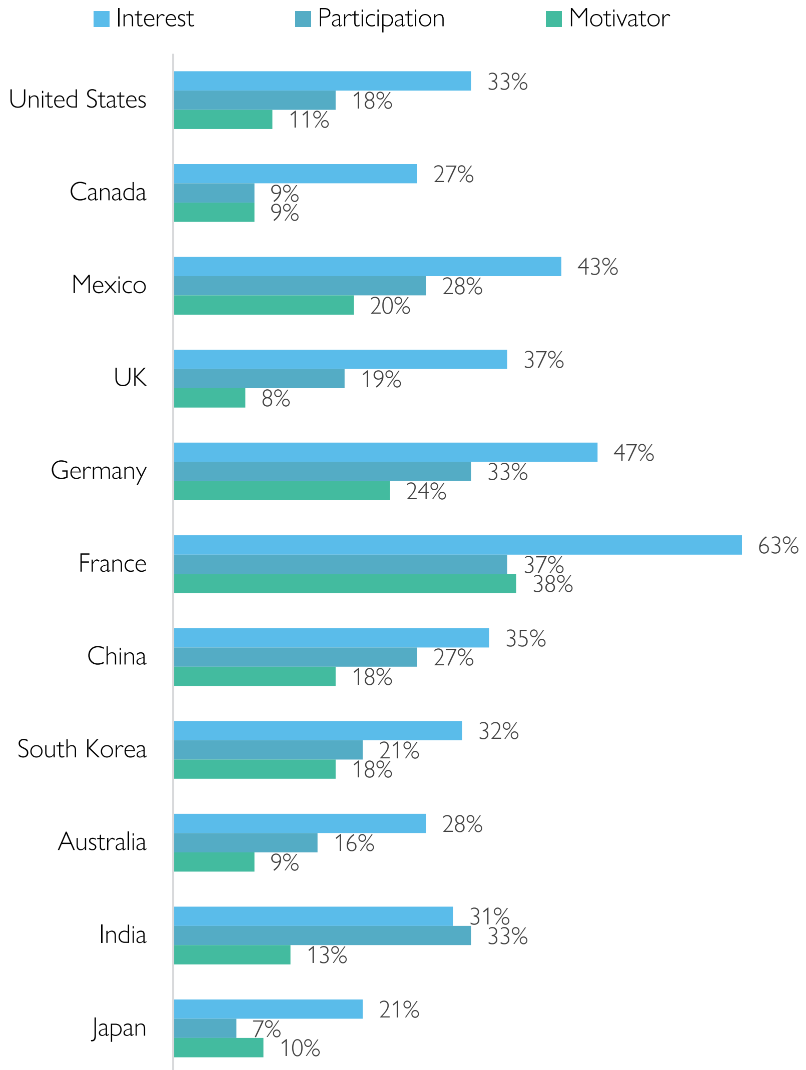
Like most tourism sectors, Indigenous tourism depends to a large extent on the momentum of market forces beyond its control to deliver consumers to its destinations. While interest in Indigenous tourism remains strong at the international level, limited interest, and participation in Indigenous tourism activities at the domestic level remains challenging.

Before the COVID-19 pandemic, the market potential was higher for Indigenous tourism from international markets. Due to international border closures, it is unclear when Canada's international tourism demand will return to pre-pandemic levels – predictions forecast from 2023 to 2025. Therefore, in the interim, British Columbia's Indigenous tourism businesses must refocus to domestic markets.

[46] Destination Canada. 2017 Global Tourism Watch Reports. https://www.destinationcanada.com/en/global-tourism-watch.

[47] Destination Canada. 2017 Global Tourism Watch Reports. https://www.destinationcanada.com/en/global-tourism-watch.

Exhibit 20: Interest, Participation and Motivation for "Aboriginal Culture and Traditions' While on Vacation 2017



Source: Destination Canada's 2017 Global Tourism Watch Studies

https://www.destinationcanada.com/en/global-tourism-watch

The Indigenous Tourism Association of Canada conducted domestic market research in Canada in 2020. Key opportunities to grow Indigenous tourism include:[48]

- Both attitudes and traveller behaviour have shifted fundamentally to the Indigenous tourism advantage by moving closer to the core values of Indigenous culture. Escapism is being redefined to embrace a slower, more mindful pace of life with your loved ones, appreciating nature, simplicity, spirituality and soulfulness to get away from hectic, stressed, overscheduled, exhausting lifestyle.

[48] Indigenous Tourism Association of Canada. 2020. COVID-19 Driven Interest Assessment of Canada's Domestic Market for Indigenous Tourism & Cultural Experiences.

- Travel-related behavioural shifts include a major surge in road trips where travellers seek hidden gems and have shifted from shorter 2-3 days to the main family vacation of 1-2 weeks.
- The creation of an industry-wide domestic strategy for tourism (including Indigenous tourism) is needed as the sector is currently not actively being considered by domestic travellers.

4 INDIGENOUS TOURISM BUSINESSES

"As soon as you're born as an Indigenous person, you become an ambassador."
– Frank Antoine, Co-Founder, Moccasin Trails Inc.
(Bonaparte Indian Band, Secwepemc Nation)

4.1 Number of Indigenous Tourism Businesses in British Columbia

This section profiles Indigenous tourism business in British Columbia.

> *Indigenous Tourism Businesses are those attractions, accommodation, outdoor adventure, food and beverage, festivals and events, retail, gas stations and transportation businesses that are Indigenous owned.*

First, Section 4.2 summarizes all known Indigenous tourism businesses in the province, then Section 4.3 provides an overview of the characteristics of Indigenous tourism businesses and their employees as collected from an online survey in spring 2020.

The Indigenous tourism business list for British Columbia was first developed in 1997 and has since been maintained through research and ITBC audit projects tracking business continued operations and adding new ventures and removing businesses that were no longer operating. For this project, the consulting team checked if the businesses had an online presence, conducted online research of social media and of Band and business lists, and verified business operations with the regional Indigenous tourism specialist and ITBC staff and other industry leaders. This Indigenous tourism business list also tracks tourism by region and location, primary tourism type, research period when the business was added to the list and if it continued operations in the research period, and now includes the ownership type and North American Industry Classification four and five digit classification codes.

4.2 All Indigenous Tourism Businesses

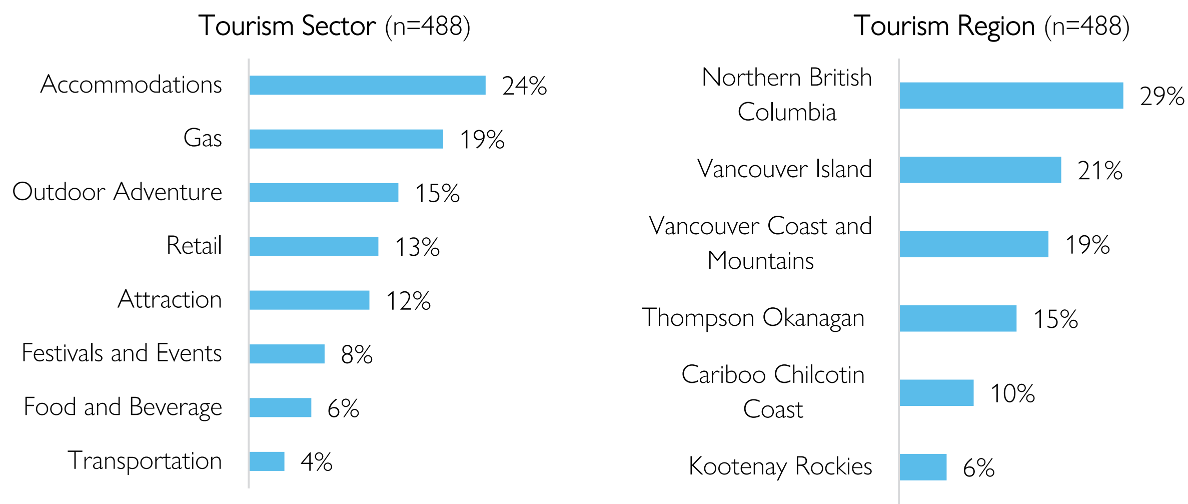
In 2020, 488 Indigenous tourism businesses were identified in British Columbia.[49] This represents about 3% of all tourism businesses in the province.[50] Almost a quarter of Indigenous tourism businesses are in the Accommodations sector followed by Retail-Gas Stations (19%), Outdoor Adventure (15%), Retail (13%) and Attractions (12%). By region,

[49] The number of Indigenous tourism businesses continuously fluctuates – 488 was the number designated in August 2020.

[50] Assuming there are 19,243 tourism businesses in BC. Source: Destination British Columbia. 2019. Value of Tourism Trends from 2007 to 2017.

Northern BC hosts about 29% of the Indigenous tourism businesses followed by Vancouver Island (21%), Vancouver Coast and Mountains (19%), the Thompson Okanagan (15%), Cariboo Chilcotin Coast (10%) and the Kootenay Rockies (6%).

Exhibit 21: BC Indigenous Tourism Business Inventory by Tourism Sector and Region



Of the 488 Indigenous tourism businesses, 14 are Métis owned (3%) mostly operating in Northern BC (43%) and Vancouver Coast and Mountains (29%) tourism regions. These Métis owned business are primarily Outdoor Adventure (43%) and Accommodations (36%).

The 488 Indigenous tourism businesses represent an increase of 87 businesses than the 2017 count[51]. Over time, there has been significant increases in Transportation (53%), Accommodation (41%), Festivals and Events (39%), Retail-Gas Stations (23%), and Food and Beverage (22%) businesses. Though since 2017, there has been a decline in the number of Retail (-25%), Attraction (-2%) and Outdoor Adventure (-1%) businesses.

[51] ITBC "The Next Phase" Tourism Performance Audit Report 2012-2017. O'Neil, Beverley, and Peter Williams. O'Neil Marketing & Consulting. March 2018. https://www.Indigenousbc.com/corporate/content/uploads/2019/11/REPORT-AboriginalPerformanceAudit-2012-2017.pdf

Exhibit 22: BC Indigenous Tourism Business Inventory Over Time by Tourism Sector

Indigenous Owned Tourism Businesses by Sector	2020 # of Businesses	2017 # of Businesses	2003 # of Businesses	% Change 2020 since 2017	% Change 2020 since 2003
Attraction	49	50	33	-2%	48%
Accommodations	119	70	29	41%	310%
Outdoor Adventure	76	77	36	-1%	111%
Food and Beverage	27	21	5	22%	440%
Festivals and Events	49	30	30	39%	63%
Retail	60	75	37	-25%	62%
Retail – Gas Stations	91	70	3	23%	2933%
Transportation	17	8	8	53%	113%
Total	488	401	181	18%	170%

NOTE: A study of First Nation owned gas stations was not available until after 2003.

These 488 businesses were also classified in accordance with the North American Industry Classification System (NAICS). The typical tourism NAICS was adjusted to align in character with the Indigenous tourism businesses in British Columbia. Overall, the largest classes of existing tourism businesses are Arts, Entertainment and Recreation (35.7%) (which includes personal services, such as a spa) and Retail Trade (30.9%). These are followed by operations in the Accommodation and Food Services (29.9%), then Transportation and Warehousing (3.5%). (Exhibit 23)

Exhibit 23: BC Indigenous Tourism Operators by NAICS

NAICS Classification	# Bus.	%
44-45 Retail Trade	151	30.9%
447 Gasoline Stations	91	18.6%
453 Miscellaneous store retailers	60	12.3%
48-49 Transportation and warehousing	17	3.5%
481 Air transportation	1	0.2%
483 Water transportation	8	1.6%
485 Transit and ground passenger transportation	3	0.6%
487 Scenic and sightseeing transportation	5	1.0%
71 Arts, entertainment and recreation & 81 Other Services	174	35.7%
711 Performing arts, spectator sports and related industries	50	10.2%
712 Heritage institutions	47	9.6%
713 Amusement, gambling and recreation industries	76	15.6%
812 Personal and laundry services	1	0.2%
72 Accommodation and food services	146	29.9%
721 Accommodation services	119	24.4%
722 Food services and drinking places	27	5.5%
TOTAL	488	100.0%

Regional Indigenous tourism business growth between 2017 and 2020 was strongest in the Kootenay Rockies (47%), followed by Northern BC (26%), the Vancouver, Coast and Mountains (16%), the Cariboo Chilcotin Coast (15%) and Vancouver Island (13%). Less substantial growth occurred in the Thompson Okanagan (3%).

Exhibit 24: BC Indigenous Tourism Business Inventory Over Time by Tourism Region

Indigenous Owned Tourism Businesses by Region	2020 # of Businesses	2017 # of Businesses	2003 # of Businesses	2020 % Change from 2017	2020 % Change from 2003
Vancouver Coast and Mountains	94	79	42	16%	124%
Vancouver Island	102	89	55	13%	85%
Cariboo Chilcotin Coast	47	40	14	15%	236%
Thompson Okanagan	74	72	24	3%	208%
Kootenay Rockies	30	16	15	47%	100%
Northern BC	141	105	31	26%	355%
Total	488	401	181	18%	170%

NOTE: A study of First Nation owned gas stations was not available until after 2003.

Of the Indigenous 488 owned tourism businesses, 329 were Band owned, 129 Indigenous individual / family owned, and 30 were owned by a society. The largest sectors of Band ownership were Accommodations (30%) and Retail-Gas Stations (26%), followed by Outdoor Adventure (12%) then Attractions (11%). Individual member tourism ownership was more prevalent in Outdoor Adventure (29%), Retail (23%, excludes gas stations), Food and Beverage (16%) and Accommodations (11%).

Exhibit 25: BC Indigenous Tourism Owners by Tourism Sector

Tourism Sector	Band Owned	Society	Individual Owned	Total	Band Owned	Society	Individual Owned	Total
Attraction	37	10	4	51	11%	33%	3%	48%
Accommodations	100	2	14	116	30%	7%	11%	48%
Outdoor Adventure	38	1	38	77	12%	3%	29%	44%
Food and Beverage	6	0	21	27	2%	0%	16%	18%
Festivals and Events	28	11	11	50	9%	37%	9%	54%
Retail	27	5	30	62	8%	17%	23%	48%
Gas	87	0	1	88	26%	0%	1%	27%
Transportation	6	1	10	17	2%	3%	8%	13%
Total	329	30	129	488	67%	6%	26%	100%
	67%	6%	26%	100%				

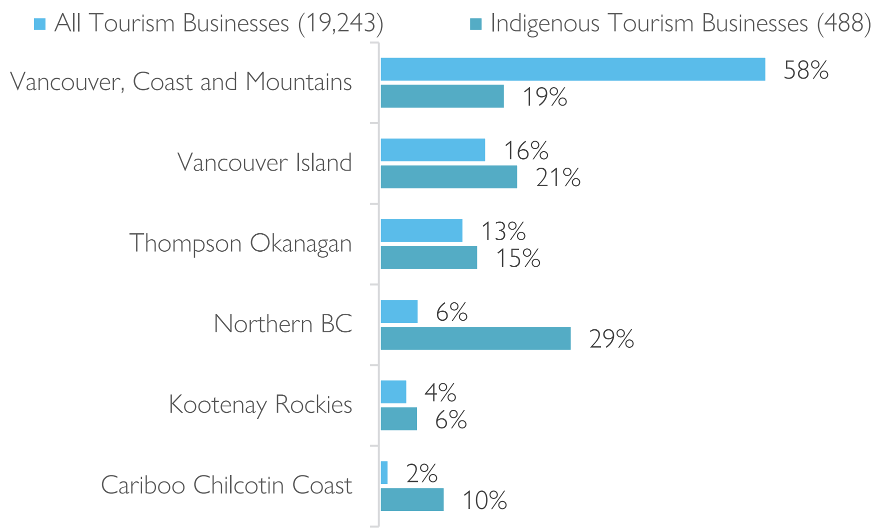
Since 2017, there were 93 new businesses identified, 395 that continued operations, and 6 Indigenous tourism business closures. Northern BC had the highest number of new businesses (39), followed by Vancouver Coast and Mountains (16), Kootenay Rockies (15), Vancouver Island (13), Cariboo Chilcotin Coast (7), and Thompson Okanagan with the least (3).

Exhibit 26: Change in Number of Indigenous Tourism Businesses by Region since 2017

2020	Cariboo Chilcotin Coast	Kootenay Rockies	Northern British Columbia	Thompson Okanagan	Vancouver Coast and Mountains	Vancouver Island	Total
2017 # of businesses operating	40	16	105	72	79	89	401
LESS: No longer operating	0	1	3	1	1	0	6
= Continued operating	40	15	102	71	78	89	395
ADD: New Indigenous businesses	7	15	39	3	16	13	93
= Current Indigenous businesses	47	30	141	74	94	102	488
NET Change # Businesses (Gain/-Loss) since 2017	7	14	36	2	15	13	87
% Change since 2017	18%	88%	34%	3%	19%	15%	22%

A rough comparison of the regional trends in all tourism businesses and Indigenous tourism businesses revealed that compared to the overall tourism industry, Indigenous tourism businesses were over-represented in the rural areas of British Columbia. This includes Northern BC, Vancouver Island, the Thompson Okanagan, the Cariboo Chilcotin Coast, and the Kootenay Rockies. There is a significant misalignment in the Vancouver Coast and Mountains tourism region where there is 58% of all tourism businesses versus 19% of Indigenous tourism businesses.

Exhibit 27: Regional Distribution of Indigenous and All Tourism Businesses in BC



Sources: 1. All Tourism Businesses. Destination BC 2019. Value of Tourism Trends from 2007 to 2017.
2. Indigenous Tourism Businesses: 2020 Inventory completed by O'Neil Marketing and Consulting.

4.3 Indigenous Tourism Business Survey Findings

This report's Indigenous tourism business survey responses provide critical insights into the operating character as well as human resource management practices and challenges of Indigenous tourism businesses across British Columbia. More specifically, it offers an overview of the type of businesses, employee complements, recruitment practices and challenges, as well as preferred employee development activities needed to help these businesses move forward in an on-going and post COVID-19 working environment.

Overall, 193 Indigenous tourism businesses provided their responses to this survey, representing 40% of Indigenous tourism businesses in British Columbia. With a few exceptions, overall responses were representative of Indigenous tourism businesses throughout the province. Survey responses were slightly less than the overall population for Retail – Gas Stations and Transportation businesses and in the Thompson Okanagan and Northern BC tourism regions. Exhibit 28: summarizes responses by tourism sector and region. More details concerning the data collection and analysis processes employed are described in Appendix E.

Where sufficient data permits, provincial results are complemented with descriptions of key sector and regional variations. However, in some sectors and regions, small sample sizes and protection of business confidentiality limited reporting options. In those cases, data from complementary sectors and regions were combined for analysis (Exhibit 29). Where differences exist, provincial analysis is complemented with mentions of key differences by grouped sectors and regions.

Exhibit 28: BC Indigenous Tourism Business Survey Responses by Tourism Sector and Region

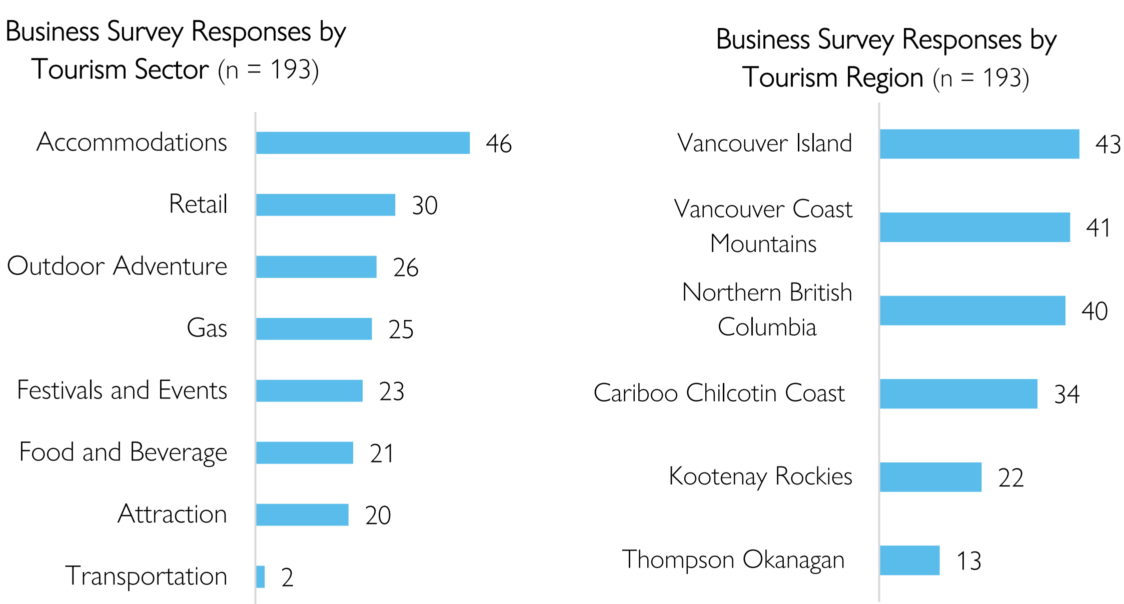


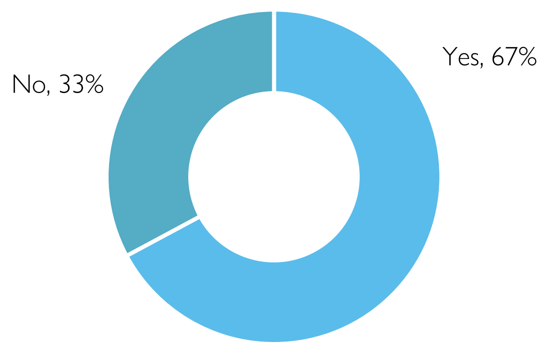
Exhibit 29: BC Indigenous Tourism Business Survey Sector and Region Grouping

Sectors	Regions
Accommodations (46) Retail and Food and Beverage (51) Outdoor Adventure & Attractions (46)	Vancouver Island (43) Vancouver Coast and Mountains (41) Northern BC and Cariboo Chilcotin Coast (74) Kootenay Rockies and Thompson Okanagan (35)

4.3.1 On / Off Reserve

About two-thirds (67%) of the businesses were located on reserve lands (Exhibit 30). Northern BC / Cariboo Chilcotin Coast had more businesses on-reserve (76%) than other regions.

Exhibit 30: BC Indigenous Tourism Businesses On-Reserve Operations

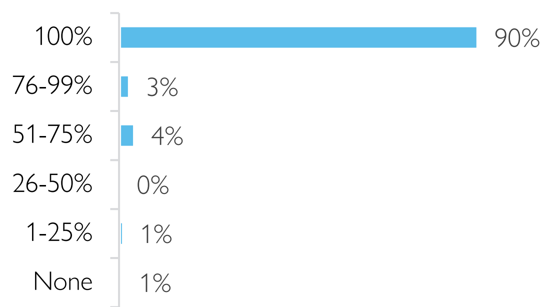


Does your business primarily operate on-reserve? n=174

4.3.2 Indigenous Ownership

Operators overwhelmingly (97%) reported that their tourism businesses were majority or wholly Indigenous owned (greater than 51% ownership). Nearly all (90%) of these operations were wholly owned by Indigenous people (Exhibit 31).

Exhibit 31: BC Indigenous Tourism Businesses: Indigenous Ownership



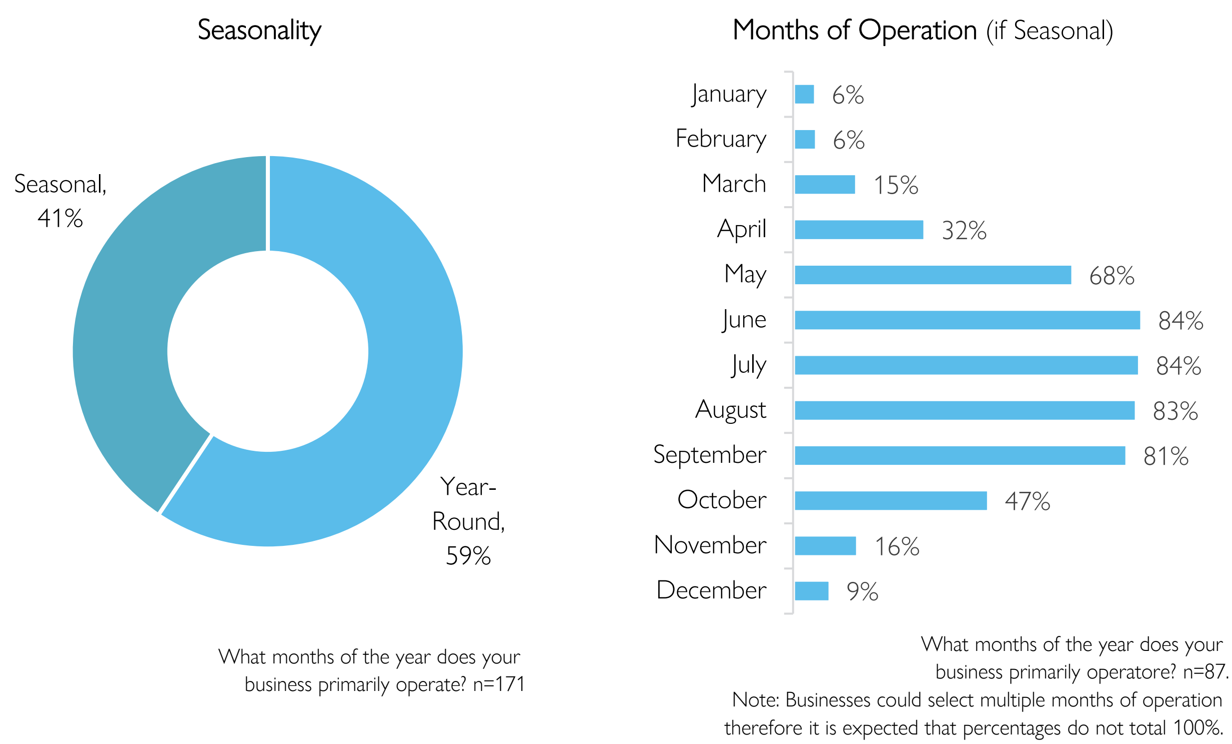
What percentage (%) of this tourism business is Indigenous owned? n=176

4.3.3 Seasonality

Approximately three-fifths (59%) of Indigenous tourism businesses operated year-round. For the most part (79%+) these year-round businesses focused on providing fuel (gas stations) or retail, as well as food and beverage services. (Exhibit 32). Further, Vancouver Coast and Mountains region businesses (71%) were most likely to operate on a year-round basis than other regions.

Their seasonal counterparts (41%) operated primarily (80%+) in the summer months of June through September (Exhibit 32). In contrast, they focused their attention on a broader range of products and services. Most prominent were operations associated with Accommodations (53%) and Outdoor Adventure / Attractions (61%).

Exhibit 32: BC Indigenous Tourism Businesses: Seasonality



4.3.4 COVID-19 Impacts

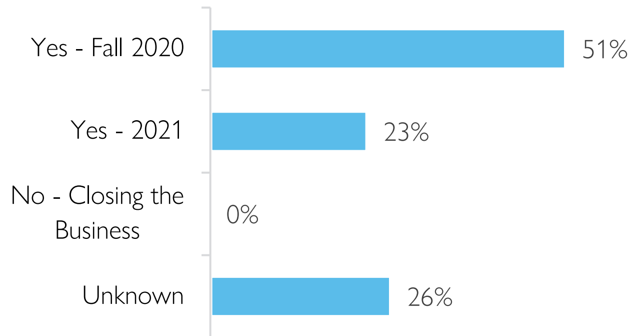
Indigenous tourism business responses to COVID-19 were collected at a stage when the policies designed to mitigate its immediate and longer-term impacts were emerging. Consequently, the findings reflect operator perspectives at that time. Most of them were in early lock-down mode and confronted with limited information on which to base their business decisions.

Overall, about half (51%) of the operators felt that they would be reopening their businesses prior to the end of 2020. Another 26% were unsure at that point about how they would proceed. The remaining 23% were planning to suspend their business activities until 2021 (Exhibit 33).

From a sectorial perspective, operators most confident that their business would be open in the fall of 2020 were Retail / Food and Beverage (63%) businesses[52]. Least positive about recommencing activities in 2020 were Outdoor Adventure / Attractions (50%) and Accommodations (51%).

From a regional perspective, those operators most confident their businesses would be open in the fall of 2020 were from the Vancouver Coast Mountain (68%) and Northern BC / Cariboo Chilcotin Coast[53] (58%) tourism regions. Least optimistic were respondents from Vancouver Island tourism region (51%).

Exhibit 33: BC Indigenous Tourism Businesses: Plans for Reopening After COVID-19 Lockdown



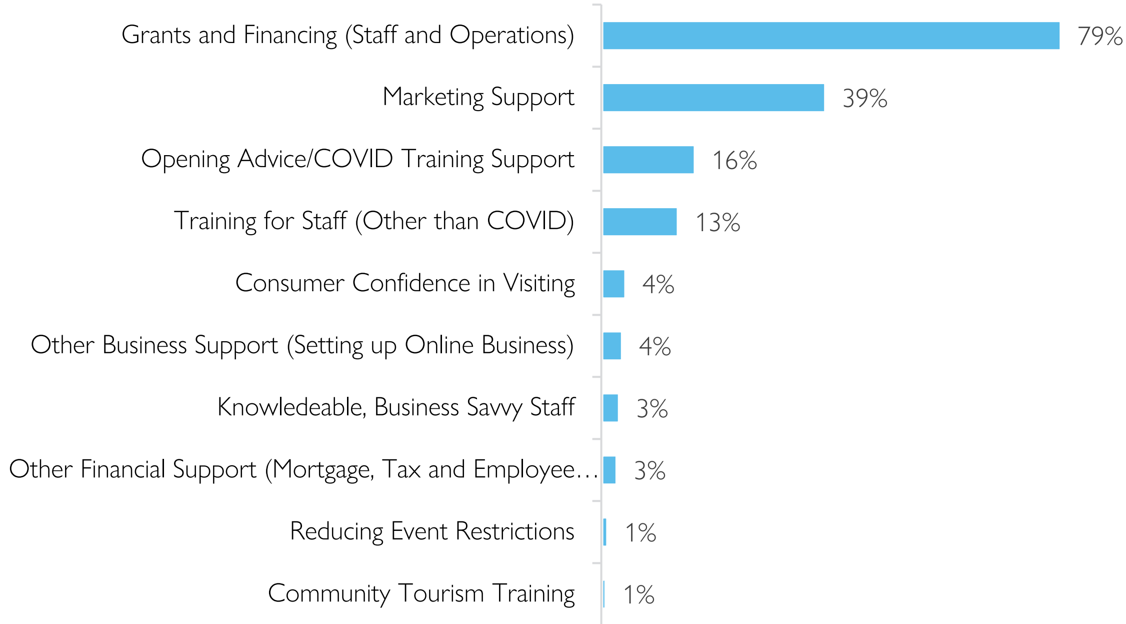
Do you expect to be able to reopen your business after the COVID-19 state of emergency lock down has been lifted? n=114

Collectively, businesses provided numerous (381) perspectives on the types of support best suited to help them either sustain or reopen their enterprises under these unprecedented conditions. Their remarks most frequently suggested – receiving financial grants designed to subsidize on-going business staffing and operating costs (79%); securing targeted marketing support to heighten consumer confidence in and awareness of existing products and services (39%); introducing staff development programs that increase awareness and adaption of COVID-19 specific business protocols (16%); as well as other forms of non-COVID specific staff development programs that would increase future business capacity (13%, Exhibit 34).

[52] The Retail and Food and Beverage survey responses were combined as there was insufficient responses in each of these sectors to report results separately.

[53] The Cariboo Chilcotin Coast and Northern BC tourism region survey response were combined so there would be sufficient data for analysis.

Exhibit 34: BC Indigenous Tourism Businesses: Post-COVID-19 Supports Needed

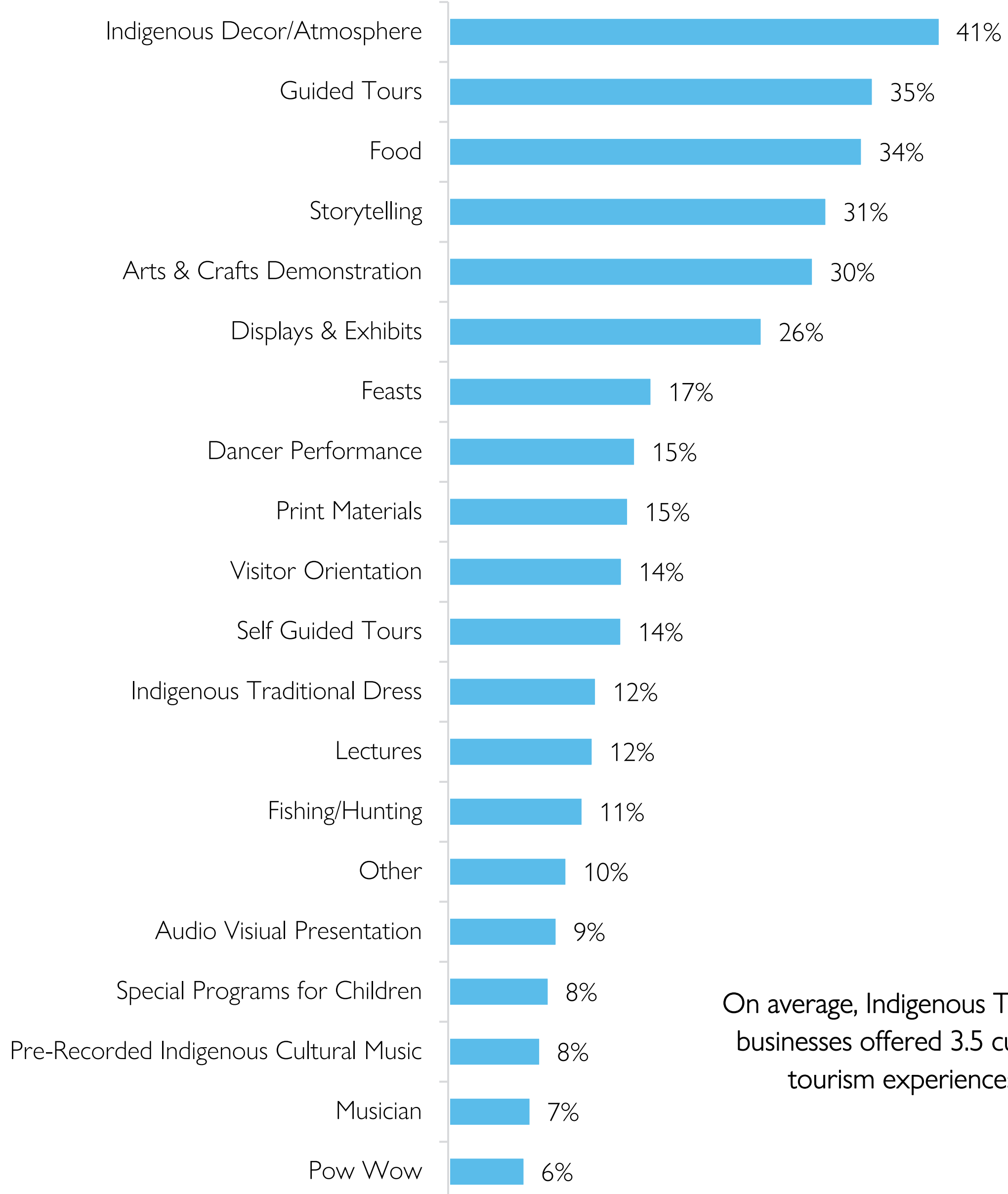


Considering the effects of the COVID-19 pandemic on your business, what types of supports do you require to be able to keep operations going or to re-open? 93 Businesses responded with 381 comments about supports.
Note: Businesses could select multiple months of operation therefore it is expected that percentages do not total 100%.

4.3.5 Cultural Experiences / Features

On average, businesses incorporated 3.5 cultural experiences in their offerings. Most frequently (30%+) these features were related to Indigenous aspects of décor, guided tours, food, storytelling, and arts / crafts demonstrations (Exhibit 35).

Exhibit 35: BC Indigenous Tourism Businesses: Cultural Tourism Experiences



On average, Indigenous Tourism businesses offered 3.5 cultural tourism experiences.

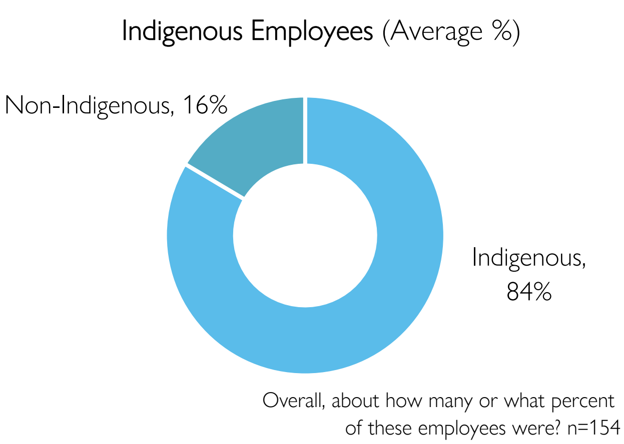
What Indigenous cultural features / activities characterize your tourism business?
193 businesses selected 722 cultural experiences.
Note: Businesses could select multiple months of operation therefore it is expected that percentages do not total 100%.

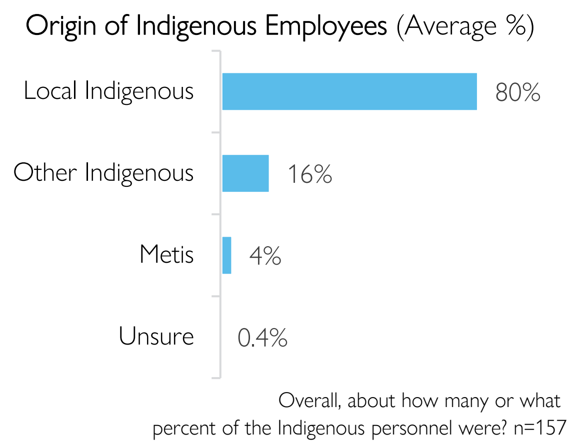
4.3.6 Employee Characteristics

Overall, employees working in these tourism businesses were primarily Indigenous (84%). About 80% of them were locally based while another 16% were Indigenous workers from other places. Additionally, around 4% of the average business workforce was Métis (Exhibit 36).

Employees were more likely to be Indigenous in Northern BC / Cariboo Chilcotin Coast (87%), Vancouver Coast and Mountains (85%), Vancouver Island (84%) compared to the Kootenay Rockies / Thompson Okanagan (75%). The proportion of Indigenous employees was less in the Accommodation sector (75%) compared to the Retail / Food and Beverage (81%) and Outdoor Adventure / Attractions (81%).

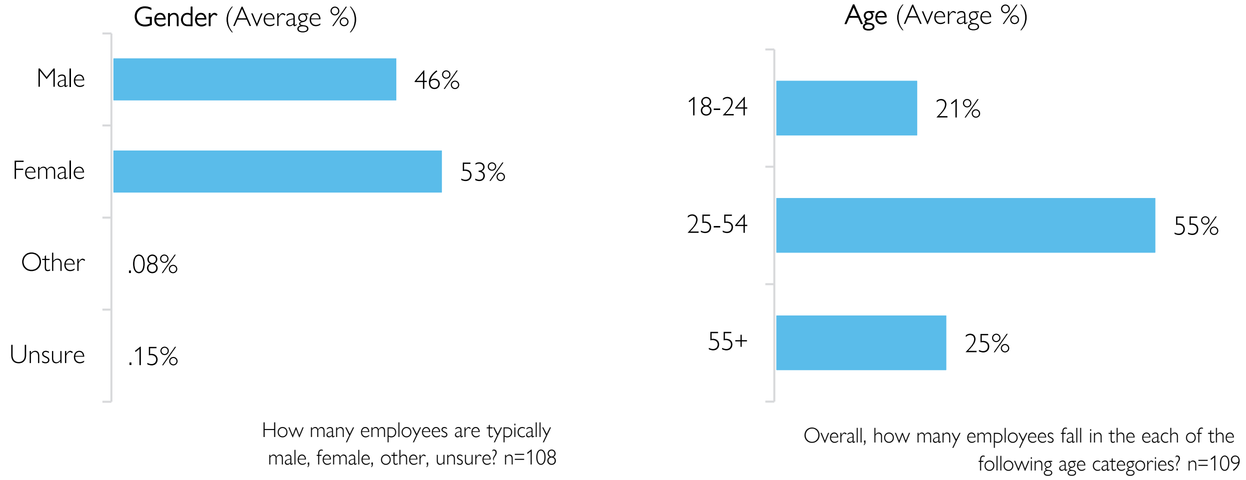
Exhibit 36: BC Indigenous Tourism Businesses: Employee Indigenous Status





More than half (53%) of all these employees was female. The largest proportion (55%) of all employees were 25-44 years old (Exhibit 37). Vancouver Island (59%) and Kootenay Rockies / Thompson Okanagan (66%) have a higher portion of females working than other regions (<47%). Not surprisingly, Outdoor Adventure / Attraction businesses had fewer older employees (55+, 13%) compared to Accommodation (33%) or Food and Beverage / Retail (33%) businesses.

Exhibit 37: BC Indigenous Tourism Businesses: Employee Demographics

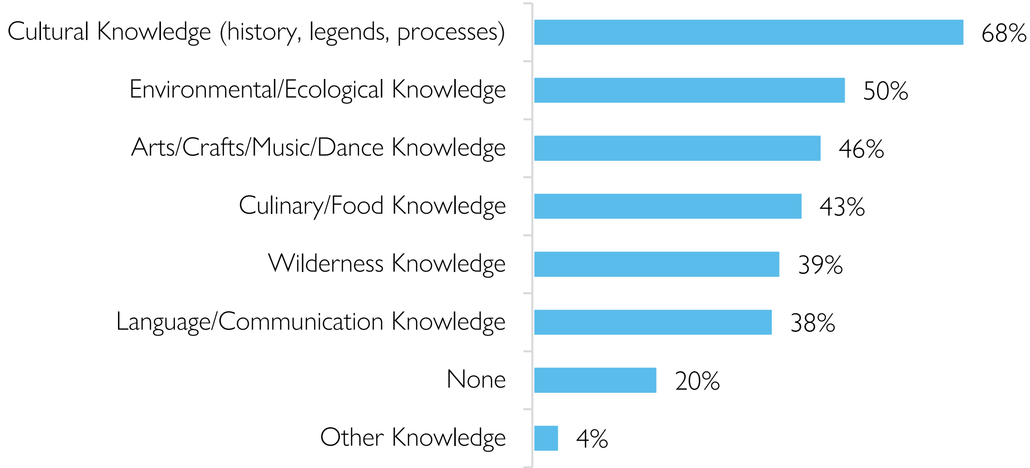


Beyond normal work-ready skills (i.e., soft skills, such as listening, teamwork, dependability, problem-solving, creativity, etc.), employers identified a range of unique Indigenous culturally based knowledge sets they felt would improve their tourism businesses. Overall, they provided about 490 suggestions related to this topic. Collectively, the most frequently reported comments (40%+) suggested increasing employee levels of Indigenous-related cultural history, environmental / ecological, and various forms of arts / craft and performing arts. Least mentioned yet still important areas of cultural advancement (20%+) were tied to language / communication, culinary / food, and wilderness knowledge (Exhibit 38). Other studies in Indigenous tourism indicate visitors are interested in learning of and experiencing Indigenous culture, First Nations indicate that tourism provides a means for preserving and promoting their culture, heritage and language, and promotes Aboriginal sovereignty.

Interest in securing employees with these knowledge sets varied by industry sector. The largest proportion (90%+) of Accommodation and Outdoor Adventure / Attraction businesses highlighted cultural knowledge as being a particularly useful asset. Not surprisingly, Outdoor Adventure / Attraction businesses were most apt (73%) to seek employees possessing environmental/ecological skills. Accommodation and Food and Beverage/Retail operators (52%+) were most focused on securing employees with culinary and food knowledge.

Emphasis placed on having candidates with such knowledge also varied across British Columbia's tourism regions. For instance, operator's noted preferences for Indigenous cultural knowledge most frequently (84%) in the Vancouver Island region. Culinary and food related knowledge was noted in most frequently (45%) in the Kootenay Rockies / Thompson Okanagan region. Profiles of each tourism region are provided in Appendix B.

Exhibit 38: BC Indigenous Tourism Businesses: Employee Knowledge and Skills Required

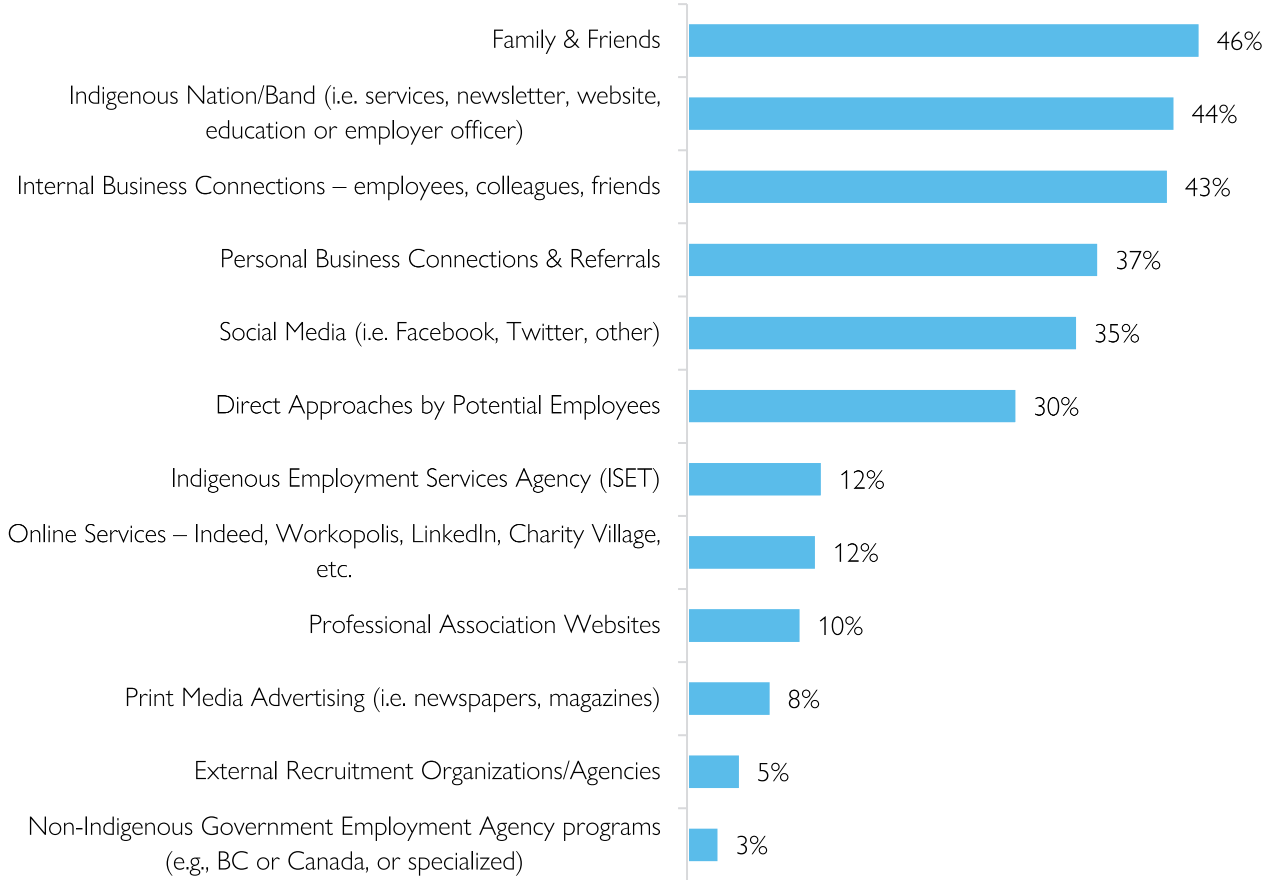


Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.
157 business responded with 491 responses.

Employers used a variety of approaches to recruit their employees. However, some were more frequently used than others. Topping the list of most used (40+%) were: Contacting relatives / friends; Reviewing Indigenous newsletters, websites, educational institute postings, etc.; and Reaching out to internal business connections (e.g., employee and other related business referrals). Least used (8% or less) were non-Indigenous government employment agencies, external recruitment organizations, and print media advertising sources. (Exhibit 39).

Variation in the use of these approaches was apparent between tourism sectors and tourism regions. For instance, contacting relatives and friends was most pronounced in the Accommodation (51%) sector, and the Vancouver Coast and Mountains (57%) tourism region. Searching Indigenous Nation / Band newsletters, websites were especially evident in the Accommodations (63%) sector and the Vancouver Island (60%) tourism region. Regular use of internal business connections was most evident in the Accommodation (51%) sector, and the Vancouver Coast and Mountains (55%) tourism region.

Exhibit 39: BC Indigenous Tourism Businesses: Recruitment Tools Used (% Regularly Use)

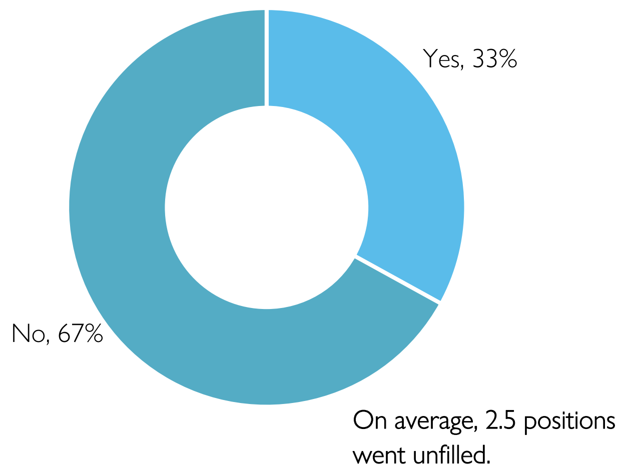


To what extend do you use each of the following communication tools to recruit employees? n=116.

4.3.7 Labour Market Challenges

Overall, about 33% of all Indigenous tourism employers indicated that they had challenges recruiting workers for their businesses in 2019 (Exhibit 40). For those businesses, on average, about 2.5 positions per business remained unfilled during 2019. Labour challenges were more common in the Vancouver Coast and Mountains (40%) and Vancouver Island (39%) tourism regions compared to other regions. Similarly, more Accommodation (38%) and Food and Beverage / Retail (36%) businesses had challenges compared to Outdoor Adventure / Attraction businesses (30%).

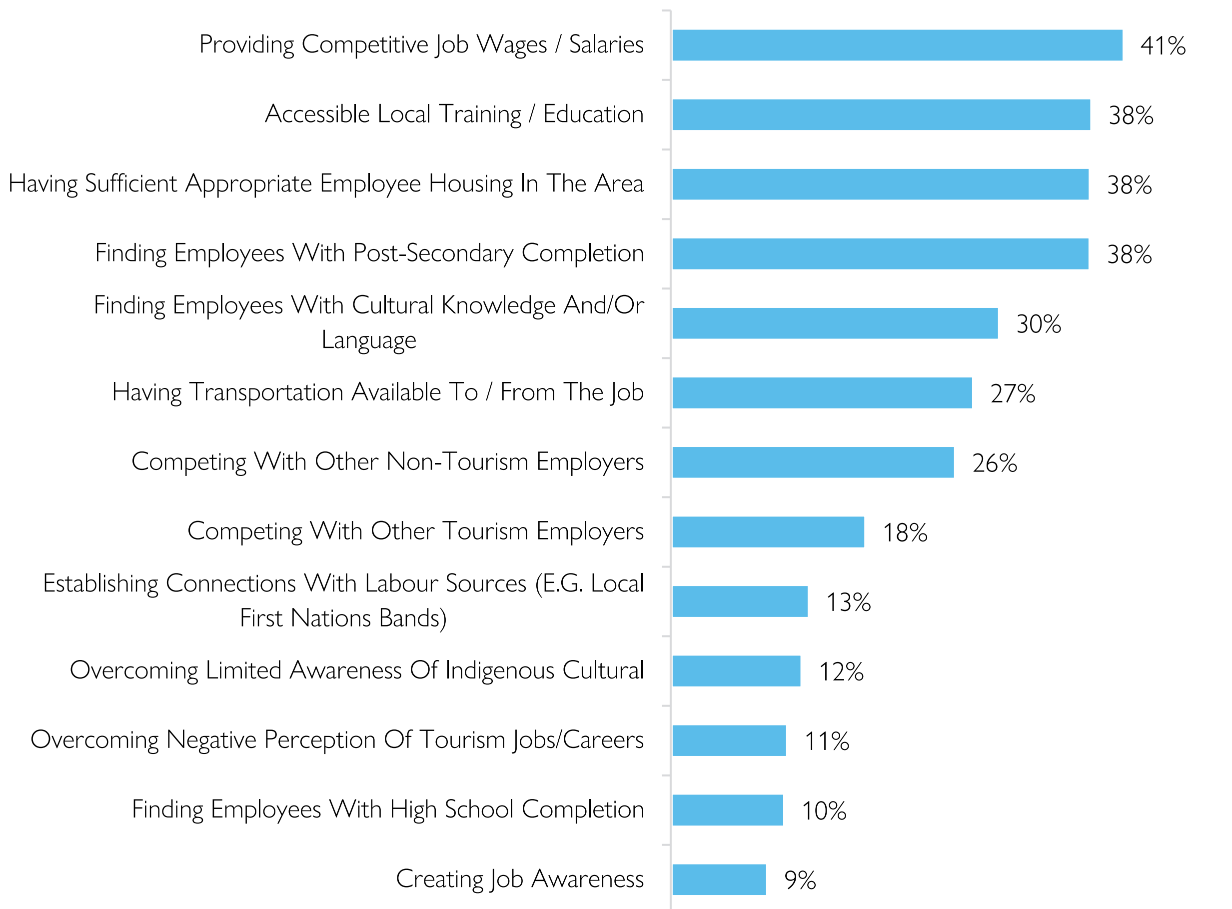
Exhibit 40: BC Indigenous Tourism Businesses: 2019 Recruitment Challenges



Overall, did your tourism business have any challenges recruiting its required employee coplement in 2019, n=121

Businesses suggested that a range of factors influenced their ability to recruit suitable workers. Those factors most frequently cited as extremely challenging recruitment barriers included – Not being able to provide candidates with competitive salaries / wages (41%); Appropriate training / education opportunities (38%); Access to appropriate housing (38%); and Sufficient levels of post-secondary education completion (38%, Exhibit 41).

Exhibit 41: BC Indigenous Tourism Businesses: Factors Impacting Recruitment (% Responding Very Challenging)



Overall, for the most challenging jobs to fill, what factors made recruiting appropriate personnel most diffiicult?
n=116.

Information about positions that were particularly difficult to fill was collected. In total, 47 responding businesses detailed the employment positions they found particularly challenging to fill. These positions ranged considerably across 78 job categories. The largest proportion of the businesses cited recruiting outdoor sport and recreation guides (20%), cooks (15%), musicians and singers (15%), drivers (14%), cleaners (13%), hotel front desk clerks (13%), retail sales (13%) and chefs (11%) and as being particularly challenging. Of all the positions identified, those most frequently (20%) noted as challenging to fill were outdoor adventure guides (Exhibit 42).

Variances in operator recruitment challenges were evident by sector and tourism region. For instance, the largest proportion of cook recruitment challenges was reported to be in the Retail / Food & Beverage (28%) and Accommodation (20%) sectors. Not surprisingly, the Outdoor Adventure / Attraction sector was the highest to respond that outdoor recreation guides were difficult to find (45%). According to businesses, finding cooks was most prominent an issue in the Vancouver, Coast and Mountains (25%) and Kootenay Rockies / Thompson Okanagan (26%) tourism regions whereas the need for outdoor adventure were highest in the Northern BC / Cariboo Chilcotin Coast (34%) and Vancouver Island (21%).

Exhibit 42: BC Indigenous Tourism Businesses: Top Positions Most Challenging to Fill (% of Businesses)

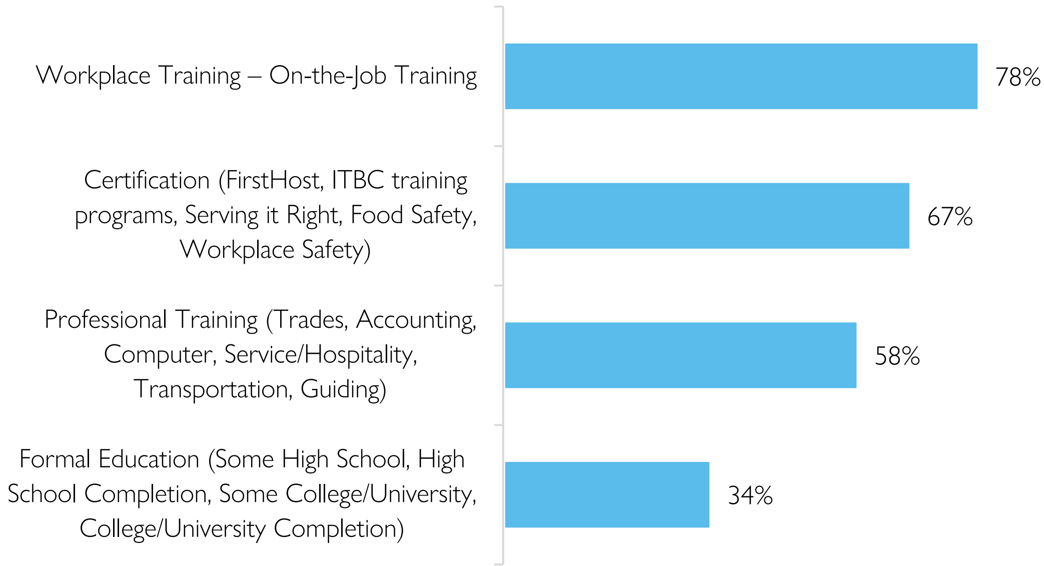
Top Positions Most Challenging to Fill	% of Businesses
Outdoor Sport and Recreational Guides	20%
Cooks	15%
Musicians and Singers	15%
Bus Drivers, Subway Operators and Other Transit Operators	14%
Light Duty Cleaners	13%
Hotel Front Desk Clerks	13%
Retail Salesperson	13%
Chefs	11%
Other Customer and Information Services Representatives	8%
Food and Beverage Servers	7%
Restaurant and Food Service Managers	6%
Janitors, Caretakers and Building Superintendents	6%
Landscaping and Grounds Maintenance Labourers	5%
Accommodation Service Managers	5%
Service Station Attendants	5%
Security Guards and Related Security Service Occupations	5%
Retail and Wholesale Trade Managers	4%
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	4%
Accounting and Related Clerks	3%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	3%
Technical Occupations Related to Museums and Art Galleries	3%
Professional Occupations in Advertising, Marketing and Public Relations	3%
Dancers	2%
Cashiers	2%
Program Leaders and Instructors in Recreation, Sport and Fitness	2%

Question: If recruiting employees was challenging, what were the three most difficult to fill?
47 Businesses mentioned 78 positions. These 78 positions were coded to 25 NOC codes.
Businesses were able to mention multiple challenging positions, so the % of businesses total more than 100%.
*Top 10 are shaded.

Types of developmental training / education noted as most frequently (50+%) being very or extremely important to their operations included: customized workplace / on-the-job training programs (79%); Certificate (e.g., FirstHost, Food Safe, Commercial Transportation Licensing. Guide, 68%), and Professional training (58%, Exhibit 43).

Businesses in the Kootenay Rockies / Thompson Okanagan (87%) and the Vancouver, Coast and Mountains (83%) tourism regions were most likely to respond that workplace training was very / extremely important. Businesses in the Vancouver, Coast and Mountains tourism region (81%) and Accommodation sector (71%) were most likely to note that certification was important. Interestingly, professional training was most important to businesses in the Northern BC / Cariboo Chilcotin Coast (76%) and the Accommodation (61%) and Outdoor Adventure / Attraction (61%) sectors. Whereas formal education was most important to Vancouver Island (50%) and Outdoor Adventure / Attraction (46%) businesses.

Exhibit 43: BC Indigenous Tourism Businesses: Importance of Education in Selecting Employees
(% Responding Very or Extremely Important)



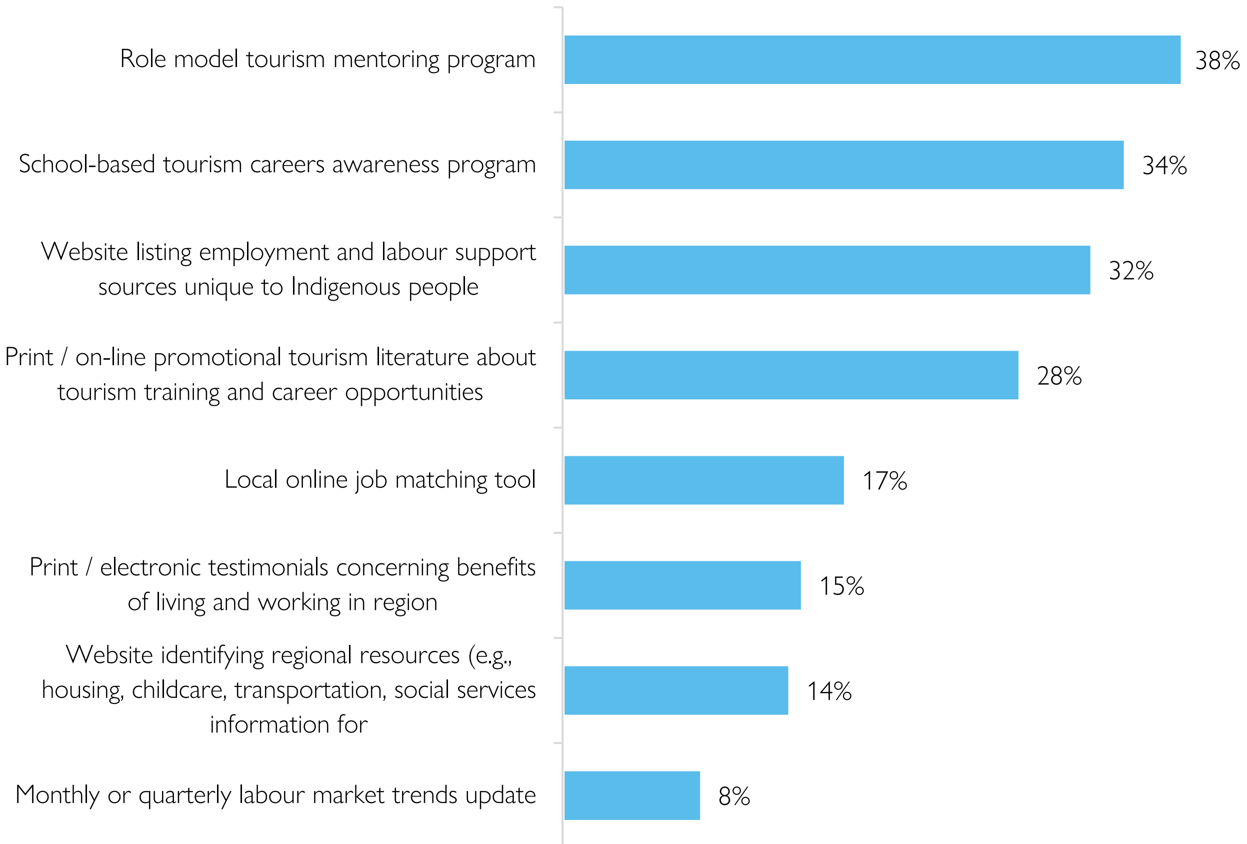
How important were the presence of the following formal education / training qualifications in your typical selection of employess?
n=117.

4.3.8 Helpful Recruitment Tools

Businesses highlighted several factors that could be helpful in future recruitment of Indigenous employees. Supportive: role model mentoring programs (38%), school-based tourism awareness programs (35%), and Indigenous tourism employment websites (32%) were most frequently mentioned as being the most helpful recruitment tools (Exhibit 44).

Interestingly, businesses in the Cariboo Chilcotin Coast / Northern BC or the accommodation sector were most likely to respond that role model tourism mentoring programs, school-based tourism careers awareness program and website employment listings service unique to Indigenous people would be helpful over the next few years. Businesses in the Vancouver Island region also noted a school-based tourism careers awareness program would be helpful.

Exhibit 44: BC Indigenous Tourism Businesses: Helpfulness of Recruitment Tools in Next Few Years (% Considered Most Helpful)



Over the next 5 years (2020-2024) to what extent would the availabiity of the following recruitment tools help your company attract Indigenous employees? Not At All, Somewhat, A Lot
n=116.

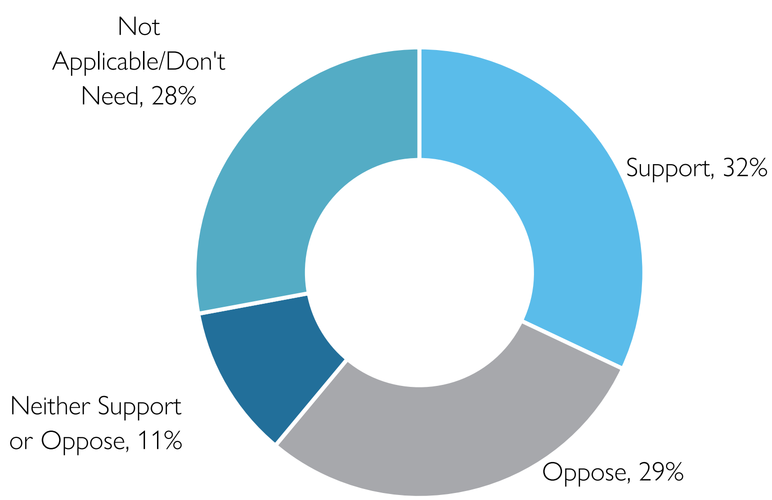
4.3.9 Foreign Recruitment

Almost all (97%) of Indigenous Businesses had not sourced the Temporary Foreign Workers Program (TFWP). Only three percent (or three businesses) responded they used the TFWP over the past five years. Businesses most frequently reported not using this program because they preferred to hire their own, local Indigenous people (45%) or did not have a need for foreign workers (41%). (Exhibit 45).

Exhibit 45: BC Indigenous Tourism Businesses: Reason for Not Using TFWP in Past 5 Years (% Businesses)

If your business has not used the Temporary Foreign Workers Program in the past to help meet its employment needs, please suggest why?
93 businesses made 108 comments about why they did not us the TFWP.
Businesses could make mutliple responses about why they did not use the TFWP so responses add to more than 100%.

Exhibit 46: BC Indigenous Tourism Businesses: Support or Oppose Temporary Foreign Workers Program (% Businesses)



What is the main reason you support or oppose the Temporary Foreign Worker Program? n=94.
Note: Most respondents did not give a full reason for 'supporting' or 'opposing' the TFWP, therefore analysis was completed only for the support or oppose level.

Representative Comments About Main Reason for Supporting or Opposing the Temporary Foreigner Worker Program (TFWP)

‘No strong feelings either way. Ultimately, we would like to be able to attract, invest in, and retain more First Nations staff before going to temporary foreign workers.’

‘Primarily our guides are Indigenous, but we could grow programs by pairing an Indigenous guide ambassador with a non-Indigenous skilled outdoor guide and or utilize the foreign staff worker in the office as well.’

‘They just can't learn in a few months a new culture and its beliefs.’

‘Not in our mandate. We want to improve training for local, Indigenous people.’

‘Lots of people in my community need jobs before we assist others.’

5 INDIGENOUS WORKFORCE PERSPECTIVES ON TOURISM

"Indigenous tourism saves lives of Indigenous people."
– Indigenous youth

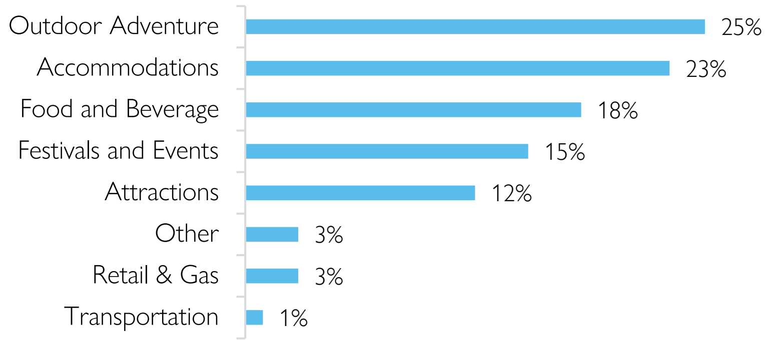
During the outreach sessions, discussions were held with 25 people from three targeted Indigenous tourism labour groups. These groups included 1) Tourism employees or former employees; 2) People exploring tourism or other business careers; and 3) Post-secondary tourism students.

Overall, the participants possessed varying levels of the following traits:

- Education – high school to post-secondary, and graduate education, as well as in a few cases other workplace certifications (i.e., FirstHost, Serving it Right, Food Safety, Workplace Safety, etc.).
- Work experience – campground, food and beverage, accommodation, guided tour (i.e., bus charter) job experiences.
- Knowledge – cultural, outdoors (environmental, ecological, wilderness), arts / crafts / music / dance, culinary foods knowledge.
- Young – primarily under 30 years old.

They had either worked in or were interested in working in Outdoor Adventure (25%) such as guided tours and wildlife viewing, Accommodations (23%) which were primarily hotels / motels and campgrounds, Food and Beverage (18%), Festivals and Events (15%), Attractions (12%) businesses (Exhibit 47). For the most part, they were seeking work in Indigenous owned businesses located on-reserve employing less than 25 people.

Exhibit 47: Indigenous Individuals Tourism Sector Interests[54]



[54] Note: The tourism sector of past work (or of the sector of interest if they had not worked in the past) of session participants was recorded. This exhibit summarizes the proportion of individuals from each sector of the total number of participants.

The participants indicated that tourism afforded them an opportunity matched with a sense of responsibility to 'give back' and fulfill ancestral obligations to protect the environment. They felt that tourism reconnected people to the land and when delivered by Indigenous people, informed visitors of Indigenous people, culture, and their resiliency in ways that Indigenous people approved. Conversely, they indicated that misinformation and improperly shared Indigenous culture and language hurt Indigenous nations and culture.

Factors that influenced their decision to seek employment in tourism workplaces included:

- Job-Personality Match – provided a job that suited their interests – one that they could be passionate about, and offered a fast-paced busy workplace.
- Career / Advancement opportunities – provided the opportunity to learn and try other positions, and had career advancement opportunities.
- Workplace enjoyment – offered them a place where they would be respected and valued, and the work would be fun and enjoyable.
- Customer Interaction – provided chances to interact with customers – which could be what attracts an employee to a destination resort.
- Wage rate – provided a living wage, and one that reflected the value of the work and its demands.
- Reputation of Business – which was reflected in the people and management, and awareness of why employees left or were dismissed.
- Indigenous owned and operated – fostered a familiar environment with work values that were similar to theirs.
- Location – provided jobs in a place suited to their lifestyle.

Typical reasons cited by these informants for leaving an employer included:

- Wages – pay is low or lower than market rates for similar positions elsewhere and the demands of the job.
- Reduction in Hours – work hours are reduced.
- Workplace Safety – workplace conditions are unsafe and unhealthy[55] (remarks were before COVID-19).
- Discrimination and Unfair Treatment – workplace discrimination, feeling disrespected, being overlooked for promotions, unfair treatment, bullying by co-workers, disrespect, lateral violence exists.
- Wrong Job – the position did not match the worker's interests and / or values do not align.
- Dead end job – there are no advancement opportunities.
- Management and Leadership – the management is not skilled and does not provide leadership, or direction and support to employees, or does not communicate well.

When looking for employment, most found opportunities through their Indigenous networks such as Indigenous agencies, Bands, friends and family, and non-Indigenous government employment agencies. They also searched online through social media sources like Facebook and Twitter, and online job sites like Indeed, Workopolis, and LinkedIn.

The top three challenges or factors that made finding a job more difficult were:

1) Accommodations – limited accessible or affordable accommodations.
2) Wage / Salary – finding a competitive job wage or salary in tourism businesses.
3) Job Requirements – inability or belief they could not qualify for the position.

[55] Unsafe and unhealthy workplace environment was indicated before the COVID-19 pandemic was declared in March 2020.

Adding to these complications was limited awareness of tourism job opportunities, a lack of opportunities to share Indigenous cultural knowledge, as well as a limited availability of transportation and overcoming negative perceptions of tourism jobs and careers.

While Indigenous people preferred to work in Indigenous owned businesses, there was a belief that management would not hire or promote or treat Band members fairly. Consequently, there can be reluctance to seek employment at Band owned tourism operations.

Young informants in these discussions identified that high wages offered in other positions that do not require high levels of education or experience would dissuade youth from seeking employment in tourism. A youth reported that their friends wanted money without having "to do the work for the big pay, such as rig workers or paramedics."

Analysis of barriers to employment from the Literature Review completed in spring 2020 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 which could be training programs solely for Indigenous learners or the adaption of content to Indigenous realities and cultures both in a safe learning environment.

Indigenous labour also required access to:

- Programs that help identify preferred career choices (career guidance), such as high school-based career counselling and professional development programs.
- 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.
- Culturally sensitive workplaces.
- Work experience programs (especially for young Indigenous people), training and job advancement opportunities.
- Mentoring and Indigenous role models.
- Childcare programs and transportation to employment sites.
- More contacts / networking, resume writing skills or job finding clubs.

6 OTHER LABOUR AND EMPLOYER CHALLENGES

Labour market challenges were explored with stakeholders in each of the six tourism regions and a variety of tourism sectors. These were either through in-person interviews pre-COVID-19, then by virtual sessions (i.e., Zoom) and telephone interviews once the pandemic was announced. Many of the comments were not unique to one region or sector, but common throughout the province. Groups engaged in these sessions included Indigenous people who were working in, have worked, or were studying tourism, Indigenous and non-Indigenous tourism operators, and sector agencies including funders and employment and training advisors.

6.1 Common Themes and Challenges

The following highlights common themes and challenges expressed during the outreach activities.

6.1.1 Indigenous Culture

Indigenous culture was a recurring topic amongst Indigenous and non-Indigenous participants. Their comments focused on recognizing the value of Indigenous culture, along with acknowledging that Indigenous cultures and people could enhance the value of British Columbia tourism experiences. This enthusiasm was matched with worry that all aspects of culture could be subjugated at the detriment of Indigenous people and future generations.

Further, Indigenous individuals and communities are concerned that Indigenous culture can be exploited, misinformation provided, and sensitive and private sites and ceremonies will be vended resulting in damage to the culture, heritage sites, people, and reputation. Also, Indigenous peoples are concerned that visitors interested in Indigenous cultural will unwillingly participate in an experience that is not approved as an authentic Indigenous cultural experience. These poor experiences can result in harm to the Indigenous tourism industry reputation and steal valuable resources needed to promote and protect Indigenous cultures and languages.

The concerns are backed by media stories. In 2020, and previous years, there were reports on design and style theft, and appropriation of Indigenous culture and arts by non-Indigenous fashion designers, artists, and souvenir manufacturers. Many Indigenous people rely on revenue generated through other labour, such as the sale of arts and crafts sales, food processing, and other knowledge sharing, to supplement their income.

COVID-19 has created greater awareness of the value of tourism to Indigenous communities and culture, including contributing to language revitalization and preservation, building youth self-esteem, and promoting Elders and Indigenous knowledge keepers valuation, in addition to enabling Indigenous Nations to execute acts of sovereignty and protect traditional lands and resources. Conversely, the COVID-19 pandemic added to apprehension of Indigenous people about tourism as COVID-19 spread from international travellers, then within Canada and communities by domestic travellers.

An increase in the number of Indigenous cultural offerings is supported by Indigenous people, tourism operators and the non-Indigenous tourism community. Indigenous people and operators feel cultural experiences will enhance their marketability and quality, while the non-Indigenous tourism community sees Indigenous tourism as a means to create high quality experiences unique to British Columbia as well as reduce seasonality of the tourism industry by creating year-round employment.

Increased Indigenous cultural offerings produce greater opportunities for Elders and Indigenous knowledge keepers to share their teachings to all Indigenous people, especially youth, and creates employment and self-employment opportunities, especially when people have unique skills, professional cook skills, and knowledge of the lands.

> It is imperative that Elders and knowledge keepers are recognized as experts and are compensated accordingly for their time, rather than expected to volunteer their services.

Indigenous tourism operators though need guidance and approval on what is culturally acceptable to share and how it can be shared. A mechanism is required for the community to provide input into the design of cultural programming offered by First Nations and individual owned tourism experiences. Other skill gaps related to Indigenous culture are:

- Shortage of knowledge about Indigenous culture including history, legends, and processes;
- Shortage of trained 'Cultural Interpreters' province wide along with limited understanding of how to develop these skill sets; and
- Lack of people with knowledge of Indigenous arts, crafts, music, and dance, including cultural dance troops to draw on for events.

Communities and tourism businesses must learn how to weave culture throughout all aspects of their business, and to create that cultural connection for the visitor. Businesses should understand that Indigenous people must be the face of the cultural tourism experience to increase the value of and authenticate that experience.

6.1.2 Indigenous Workforce Challenges

Despite a growing Indigenous population and the fact that more than half (53%) of the on-reserve households are not in the labour force or unemployed and an off-reserve unemployment rate of 15%, there still remains barriers and challenges exist that stop Indigenous people from gaining employment in the tourism industry.

First, Indigenous people who are employable are already working – meaning they have the attitude, drive and other soft skills employers seek, as well as the related education and work experience. Indigenous people who are not in the labour force or who are unemployed may be for several reasons. They may experience multiple barriers to employment, such as lacking basic work skills, which may be coupled with other obstacles such as having less than a Grade 12 education, experience poverty which disables them from having the basic resources to be able to work (i.e., unable to afford transportation, experience food insecurity, no fixed address / homelessness, lack a drivers licence), have mobility or physical challenges, have health matters including substance misuse, or have a criminal record. Bind a few of these barriers together and the chances of entry and success in the workplace drop.

Second, there are also people who are not interested in working in tourism for various reasons. Sentiments that float around the Indigenous community are the fear that others will steal or appropriate Indigenous culture, and that Indigenous cultural tourism is 'selling out' and contradictory to Indigenous beliefs.

Third, Government transfers payments can also contribute to the lack of interest or motivation to work, especially for youth, when payments and other stimulus payments are enough to cover their living expenses. There must be other factors that inspire Indigenous people not in the workforce to change.

Fourth, Indigenous people also may be reluctant to apply for jobs they feel they may not qualify for based on the posted credentials, or they may feel they will be overlooked because they are Indigenous. They may also avoid employers that have a bad reputation, pay low wages or position demands are high for the wage, or there are difficulties accessing the work due to transportation challenges and costs, or lack of available and affordable housing, and other supports like childcare.

Finally, the seasonality of the job too may be a deterrent when year-round employment is wanted. Also, some seasonal jobs do not generate enough hours to qualify for Employment Insurance (EI) when work ends. Although the seasonality of the industry has been attractive to persons who are in post-secondary studies or have seasonal or temporary employment in other fields (i.e., people working in schools).

6.1.3 Employers Approach

For a long period, employers were able to 'choose' their workers and demand qualifications that were not essential to the position, thus creating 'false barriers'. With labour shortages in all regions and industries, it is now an employee's market. Employers must shift its recruitment practices, application and hiring processes from 'tell us why we should hire you' to 'let us tell you what we can offer, so you will choose to work with us'. Employers must be realistic in their search and create an environment where employees want to be, excel, and contribute.

The following hiring approaches require transformation:

- Remove stringent qualifications that focus on education and credentials rather than hiring on potential and cultural knowledge – cultural knowledge must be valued;
- Utilize Indigenous networks to connect with Indigenous people; and
- Understand how Indigenous people, especially millennials and youth, think and function then adapt the hiring process and workplace to appeal to youth.

Employers want to know how to find and create a high-quality working environment for Indigenous people. They are seeking opportunities to connect with Indigenous people, such as invitations to participate in career fairs and trade forums in the Indigenous communities. Industry experts have noted the following tourism employer challenges:

- Pre-requisite that applicants already have experience as the employer was unable to afford the time or expense to provide on-the-job training.
- Limited job training opportunities.

- A lack of understanding the power of social media to attract and deter Indigenous youth to tourism.
- Employers not selling themselves and 'what sets them apart' from others in tourism and other industries competing for the same workforce.
- Lack of housing or staff housing and employment for graduates and Band members who want to return home.

Reputable businesses have established practices that support employees with entering and being successful in the workplace. They include:

- Providing Human Resources (HR) job-coach support for personal and work-related issues.
- Ongoing workplace-based training to support advancement to management.
- Incentives that value and acknowledge employee participation.
- Strong onboarding / workplace orientation program that clearly explains operation services standards to the employee, including an employee policy manual.
- Need for advanced leadership training to create an employee's path forward.
- Employee benefits that enable Indigenous employees to participate in community and cultural activities such as ceremonies, hunting, fishing, gathering, and funerals, rights of passage, etc.

In addition, industry experts noted that assisting Indigenous people who have little or no experience in the workplace, or have been out of the workforce for a period, require supports that:

- Develop life skills on workplace etiquette and expectations.
- Build personal and professional employee confidence.
- Create a sense of 'belonging' and value in the workplace like regular 'check-ins' with what staff are thinking and how they are doing.
- Connect employees with services that improve social conditions, and health, including mental health.
- Eliminate discrimination, sexual harassment, racism and lateral (peer) racism in the workplace.

6.1.4 Training and Skills Development

Despite on-the-job training being a standard mode for people learning their trade and advancing in the workplace, few on-the-job training initiatives were identified in small businesses, yet were prevalent in large operations and chains. Some larger accommodations businesses are connected to national and international branding that enable access to industry training.

Small ventures though may not require intensive training, however, specific knowledge in business operations like accounting, social media marketing, management and human resources are required. These programs must be accessible by location, delivery, and cost. Train-the-trainer programs that develop regional trainers can make programs more accessible by having trainers available in regions.

Training with a coordinated approach designed for Indigenous people and communities is required. The following are identified needs in Indigenous training.

- A cohesive strategy of tourism training programs and government dollars to support this initiative.
- Awareness by Indigenous communities of where to access tourism specific training.

- A focused 10 to 12-week comprehensive certified tourism course covering all aspects of a tourism business operation which include Indigenous elements and methods to promote Indigenous labor participation in tourism.
- Existing training tools need to be Indigenized to be impactful in Indigenous communities and training institutions.
- Sector and specialized training for cultural guides, storytelling, fishing guides, outdoor guides, Indigenous protocols, social media, podcasting and online marketing, cultural leadership, environmental and ecological, arts and crafts, and culinary and foods.
- Youth pre-employment programs to promote Indigenous tourism.
- Upgraded technology training to keep up with changes in the industry.
- Training done onsite (in-situ) where the experience takes place, rather than in the classroom.
- Prep and foundation programs that ready students to enter training institutes, that guide people to the career that suits their interests.
- Approaches that screen candidates to programs, rather than placing people into programs to 'fill available seats'.
- On the job coaching and mentoring that counsel Indigenous students and employees on workplace and personal challenges.[56]

6.1.5 Independent Entrepreneur Supports

Industry leaders acknowledged there are few supports for independent entrepreneurs. Challenges include:

- Limited to no access to training and support dollars that are available to Bands; and
- Off Reserve and Métis access to programs to support business operations are limited to Aboriginal Financial Institutes (AFI's), Community Futures and bank loan financing, and little to no support for employee development.

Business funding programs, and those created for emergency and unusual situations, such as COVID-19 and forest fires, should be designed for all sizes of Indigenous tourism businesses. Supports are required for Indigenous operators that have no employees, have livestock, and those that need to replace equipment and assets to maintain safety standards or improve to remain competitive.

Micro enterprises and small business also require additional supports for their employees beginning with training on employment standards, marketing, HR services, as well as employee individual supports for trauma, mental health issues, addictions.

In addition, there is a need for immediate, accessible training in preparing for emergencies and fulfilment of health requirements, such as those posed by COVID-19.

[56] Job Coaches are typical in ISET managed trades and construction programs.

6.1.6 Provision of Living Wages

The perception that tourism is low paying, seasonal and subservient to customers who are 'always right', discourage people from pursuing careers in this field. Higher wages can offset these negative attributes (along with promotion of other tourism and work-related benefits); however, operators must adjust their operations and repackage and position their business so that it is viewed as a high-quality experience with corresponding premium prices.

6.1.7 Training

It was reported there is a disjointed approach to coordination of training between employers, employment agencies and training. Training programs and courses that are developed with Indigenous and employer input can improve the Indigenous participants learning and completion. Changes to the design of training programs, whether they are coordinated with agencies or post-secondary institutes is needed, specifically in the order of in-person training and employment practicums. The Indigenous community and employers are open to providing input to program designs.

The tourism industry needs to secure its connections with Indigenous and Métis employment training agencies (ISETs). Much of the current certification training offered by ISETs, for example WHMIS, First Aid, Serving It Right, Drivers Licence, are needed in tourism too.

Strategic partnerships are required in several occupations and sectors, such as with culinary arts, especially as Chefs, were identified as one of the most difficult positions to fill.

6.2 Non-Indigenous Tourism Industry Sector Organizations

Seven sector organizations were interviewed to determine their experience with Indigenous labour and the role of Indigenous labour in their operations. All the organizations either had member businesses that identified as Indigenous tourism businesses, or they knew they were an Indigenous operation by their address.

Generally, the sector organizations had a set of standards that are required before a business can join the association. In most cases this was completing a series of questions and submitting the executed document to the organization for approval.

All sector organizations expressed difficulty attracting Indigenous employees. Similar circumstances to general tourism operators were expressed by organizations relating to Indigenous people not able to travel to work due to no transportation or drivers' licence, and reluctance to relocate to the place of operation for extended periods of time.

Highly specialized sector organizations such as the Mountain Guides indicated that there were no experienced and certified Indigenous mountain guides to draw from. The Mountain Guides Association was interested in partnerships with ITBC and training organizations that could help Indigenous people who were interested to gain the technical skills and certifications to either start their own businesses or work with existing operators.

Other organizations such as the Golf Association reported members provided excellent incentives to attract Indigenous labour such as free golf, though uptake was very low. One member shared they have an Indigenous worker that had been with their company for over 15 years.

All the organizations had or were interested in an MOU with ITBC as a means of promoting their sector to Indigenous businesses and finding ways to jointly market member businesses. Further, they are interested in expanding their memberships with the hope that ITBC can promote the development of new businesses.

6.3 Indigenous Tourism Sub-Sectors

There are specialized demands in each of the tourism sectors for labour, of which Indigenous people are well-suited to fulfill. Operators of Outdoor Adventure, especially fishing and whale watching tours, are attracted to Indigenous people of coastal communities for the knowledge of the waters and land. Indigenous communities have had youth develop mountain biking trails as a way to connect them with the lands, then these trails become loss leaders that contribute to other community ventures.

Other sectors like Accommodations are seeking candidates to fill front desk positions and housekeeping, while Food and Beverage require food safe related credentials, suppliers of Indigenous cultural ingredients, and skilled Chefs who have Indigenous culinary skills.

Attractions and Retail gift shops require front counter workers who have interpersonal and communication skills, as well as cultural knowledge, and since the pandemic, demand skills in online marketing and social media. Essentially, they are cultural interpreters and storytellers who can explain their Indigenous culture – the way an item was made, the colors used in a mask – and share their language, and how their culture differs and is similar to others.

While Retail-Gas Stations are the largest employers, these positions typically do not require high levels of education or other credentials for employment, and were the least affected by COVID-19 closures. Gas stations have always been a place where travelers can get food, sometimes souvenirs, and ask for advice on things to do, where to go. As a point of first contact, cultural knowledge, language, and interpretive skills would be beneficial to gas station employees.

Indigenous Festivals and Events are typically coordinated by volunteer family or community groups or is an add-on to a Band or Indigenous organization employees.[57] Skills required for this sector are in event planning, onsite management, emergency and first aid, security, and emceeing. They also require certification in programs like FOODSAFE, Serving It Right (SIR), First Aid, and FirstHost / SuperHost. This sector can open employment, self-employment and other labour opportunities in event planning, and cultural interpretation.

Transportation is a sector that requires specialized training like air pilot, or marine / water captain, or a specialized class of drivers licence. There are ISETs that have coordinated training with employers and sector organizations for marine work, and can also support individuals with individual seat purchases.

[57] There are two BC Indigenous controlled societies that are setup exclusively to organize large events and have employees.

7 NON-INDIGENOUS TOURISM BUSINESSES

> "The rainbow of Canada is it's Indigenous people. They create the color in the common landscape of tourism found around the world. They are the key to creating uniqueness for Canadian tourism."

This section summarizes insights from non-Indigenous tourism business in British Columbia. It includes information about employment and recruitment of Indigenous people, COVID-19 impacts, the future likelihood of hiring Indigenous people and the skills they need, recruitment and retention challenges and training details. Sample sizes are small, so sector and regional comparisons are not made. (See Appendix D for survey details).

7.1 Indigenous Employment and Impacts of COVID-19

While the information provided was gathered during the disruptive commencement of a second wave resurgence of COVID-19, respondents offered valuable insights into their perspectives on hiring Indigenous employees, as well those challenges and opportunities for encouraging increased engagement in future business operations.

In the five years prior to COVID-19 more than half of the companies (52%) had employed Indigenous personnel in their operations. If an Indigenous person was hired, employers were asked in what kinds of positions they were hired. Business responded that Indigenous people were hired for frontline customer service positions (44%), or Skilled / Semi-Skilled Trades / Apprentice Trades (21%) positions[58]. Overall, about 6% of the hires focused on recruiting personnel for positions highlighting aspects of Indigenous culture (Exhibit 48).

[58] Note these categories were provided to tourism employers who categorized their own responses.

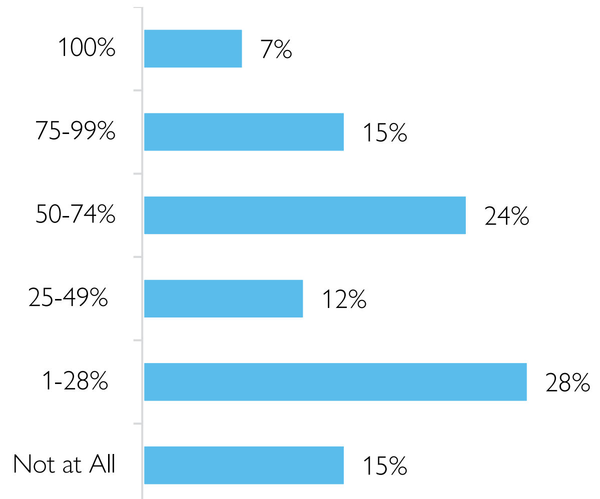
Exhibit 48: BC Tourism Businesses: Indigenous People Hired and Positions (% Businesses)

During the past five years and prior to Covid-19, had your tourism business hired any Indigenous (status, non-status, Métis) employees? n=69

If Yes, in what positions did your business employ them? (Check all that apply)? n = 63

Since the emergence of COVID-19 in March of 2020 and the extension through to October 2020, more than half of the operators (54%) worked with less than half their normal complement of staff members. A full 15% of them employed none at all (Exhibit 49).

Exhibit 49: BC Tourism Businesses: Level of Employment Complement Due COVID-19 (% Businesses)

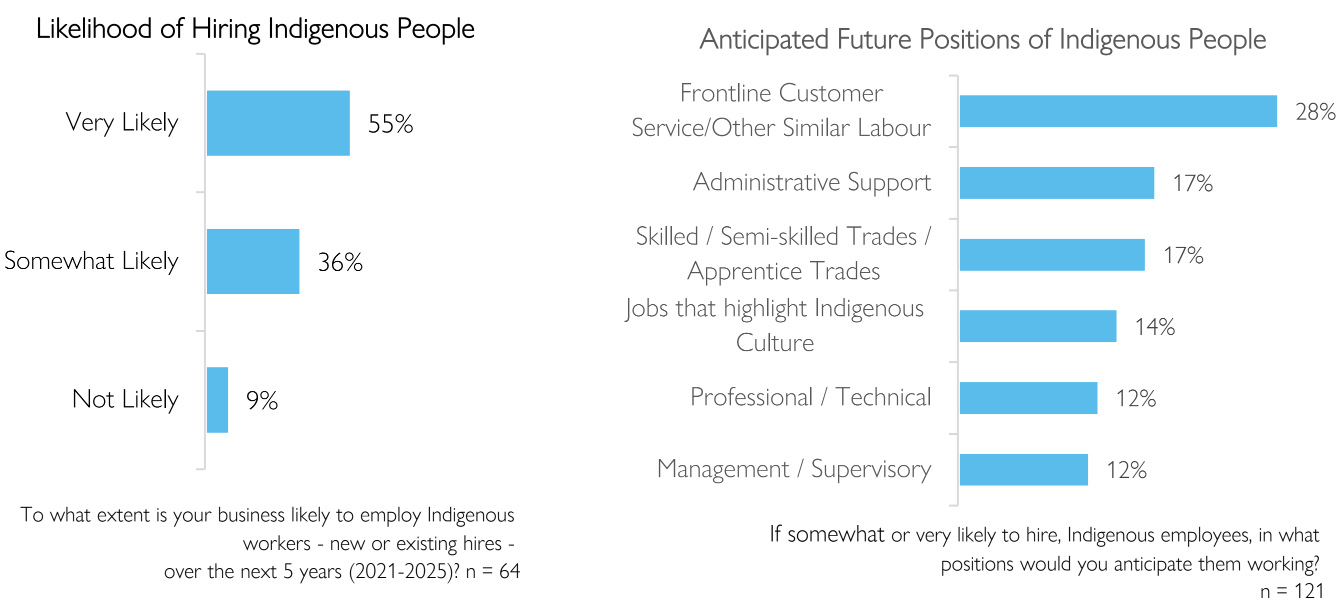


During the 2020 COVID-19 lock down (starting March 18, 2020 to time of survey completion - October 2020), to what level of full employment capacity has your tourism business operated? n = 63

7.2 Anticipated Recruitment

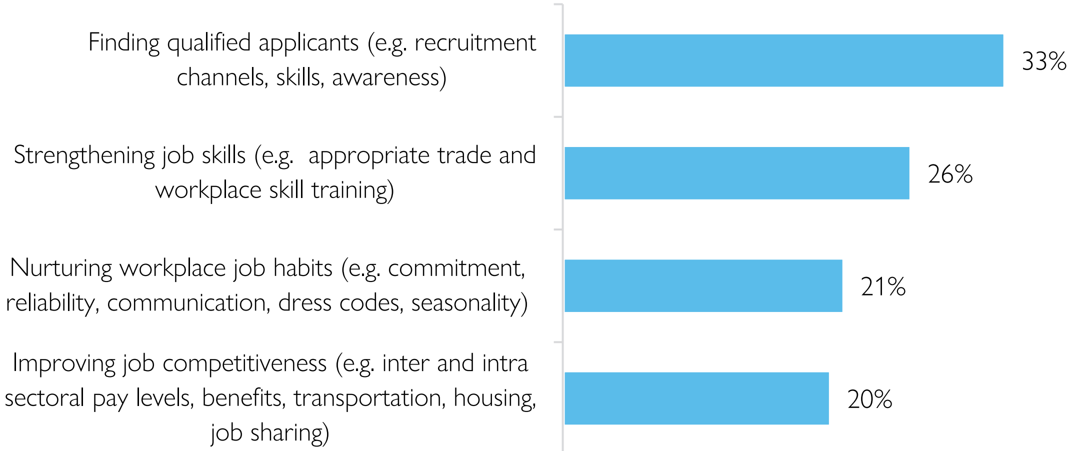
The vast majority (91%) of the business operators expressed a readiness to hire and / or retain Indigenous employees in their enterprises over the next five years (Exhibit 50). For many operations this anticipated willingness was considered very likely (55%). Amongst these businesses, the most frequently highlighted jobs were anticipated to be linked to front line customer service / other similar labour (28%), administrative (17%) or skilled or semi-skilled trades (17%) positions. As well, hiring people for positions that specifically highlighted Indigenous cultural knowledge and skills was anticipated to be likely for about 14% of these employers (Exhibit 50).

Exhibit 50: BC Tourism Businesses: Likelihood of Hiring Indigenous People and Positions (% Businesses)



Overall, these operators identified multiple 'top of mind' recruitment and retention challenges. Collectively their qualitative comments centered on several common themes. Those most frequently mentioned dealt with issues concerning – finding qualified applicants to apply (33%); strengthening employee job skills (26%); nurturing strong employee workplace habits (21%); and, improving job competitiveness (20%, Exhibit 51).

Exhibit 51: BC Tourism Businesses: Top of Mind Recruitment Challenges



If your business is somewhat or very likely to recruit Indigenous employees at some point over the next five years, what would be the three most significant challenges to doing so?

n = 64

7.3 Motivations for Recruiting Indigenous Employees

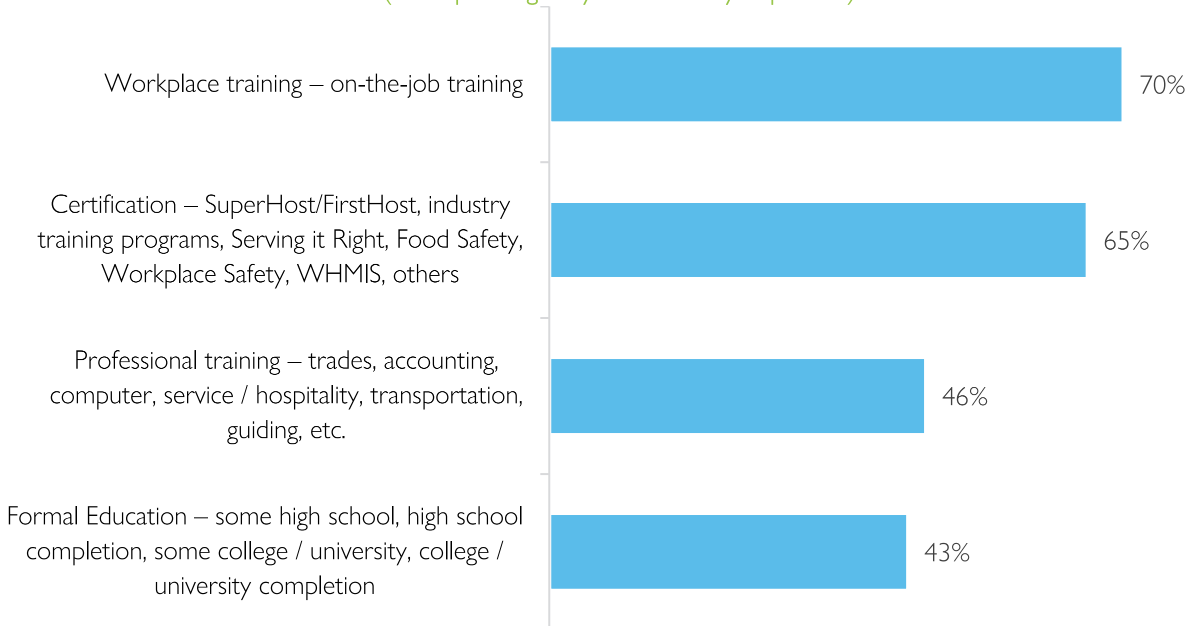
Employers most likely to hire Indigenous employees also provided a range of qualitative reasons for doing so. Most prevalent themes included: past positive Indigenous employment experiences in their businesses; an appreciation of the role a multicultural workforce can have in enhancing visitors' experiences; and awareness of a potential nearby culturally rich workforce. However, it was also apparent that most recruitment was predicated on having workplace ready candidates for available jobs.

Reasons for not likely hiring Indigenous employees were based on concerns about limited ability to attract qualified personnel; past poor experiences with sub-standard workplace habits and commitments; and limited access to personnel with appropriate workplace training. An underlying tone amongst many of these operators was that there was a readiness to hire Indigenous employees as long as they demonstrated a commitment to doing the job to acceptable standards.

7.4 Preferred Employee Education / Training Experience

Employers identified the types of educational / training exposure they preferred their potential employees to possess. Those most frequently considered very or extremely important for potential employees to have pursued included various forms of on-the-job workplace training (70%) and pertinent workplace certifications (65%, Exhibit 52). These results were in alignment with perspectives shared in workplace training by Indigenous tourism businesses (Exhibit 43).

Exhibit 52: BC Tourism Businesses: Importance of Education in Selecting Employees
(% Responding Very or Extremely Important)



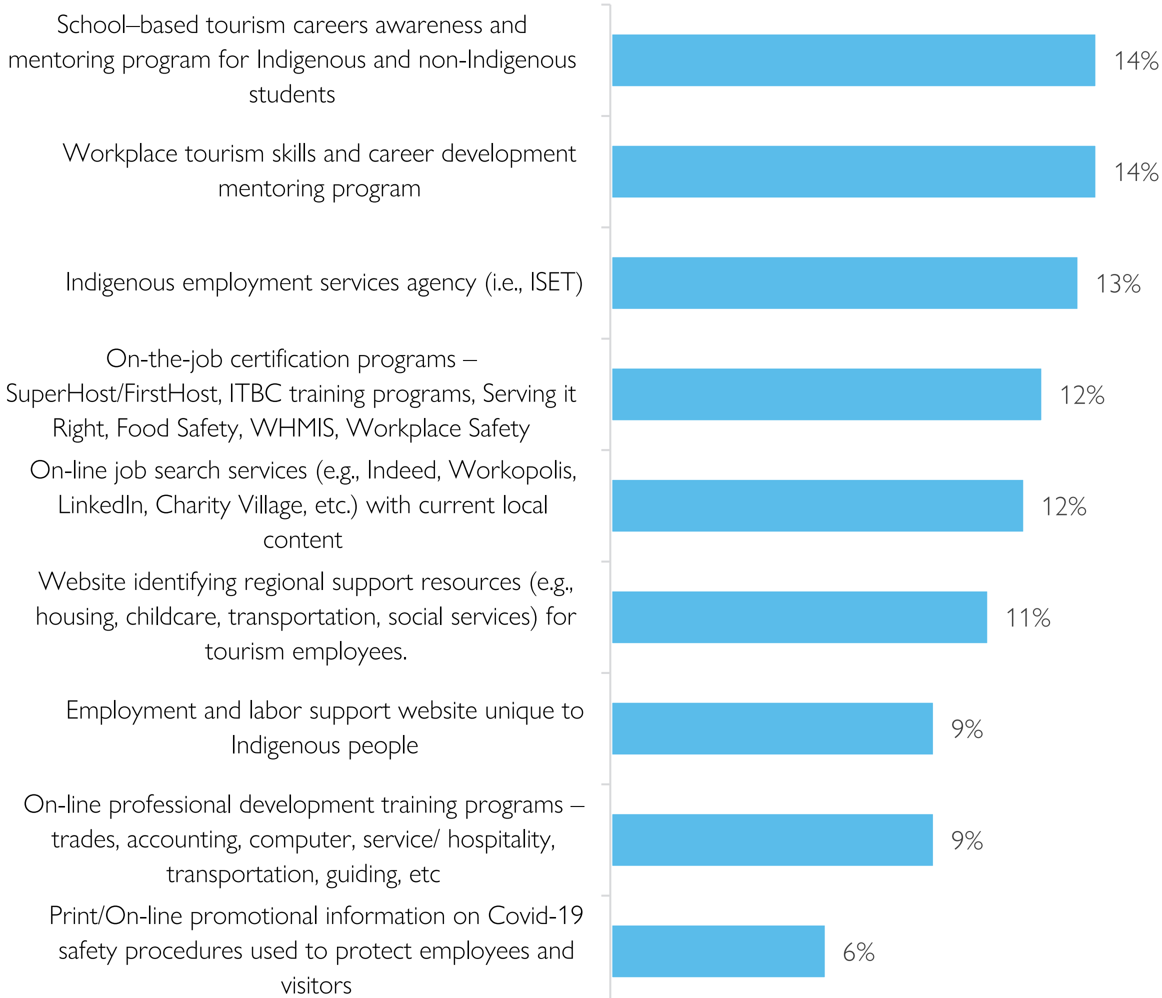
How important were the presence of the following formal education/training qualifications in your typical selection of employess?
n=46.

7.5 Preferred Recruitment Support Programs

Employers identified a range of recruitment support programs they considered particularly helpful to them in their search for good employees. Those most frequently mentioned included programs related to school-based tourism career awareness (14%), workplace skills development (14%), and Indigenous employment services agency (13%), and on-the-job tourism certification (12%, Exhibit 53).

These results were similar to Indigenous tourism businesses where there was preference for supportive role model mentoring programs (38%), and school-based tourism awareness programs (35%). In contrast, a greater portion of Indigenous tourism businesses responded that employment and labour websites specific to Indigenous people would be helpful (32%) (Exhibit 44).

Exhibit 53: BC Tourism Businesses: Helpfulness of Recruitment Tools in Next Few Years
(% Considered Most Helpful)



Which of the following tools would be helpful in addressing any of these recruitment challenges? (Check only the most helpful tools)
n=64 and 196 responses.

International (foreign worker) programs were used as an employee recruitment tool by about two-thirds (65%) of the tourism businesses in this survey. While few were used extensively, those most frequently mentioned were linked to: working holiday visas (12%), student work permits (11%), and temporary foreign workers agreements. (10%; Exhibit 54).

Exhibit 54: BC Tourism Businesses: Foreign Worker Programs Used

Summary of Foreign Worker Programs Used	% of Businesses
Working Holiday Visa	12%
Work Permit for International Student	11%
Temporary Foreign Workers Program	10%
Provincial Nominee program	5%
Canadian Experience Class	2%
Federal Skilled Trades program	2%
Federal Skills Worker program	0%
Other program	3%
None – skip to final comments	24%

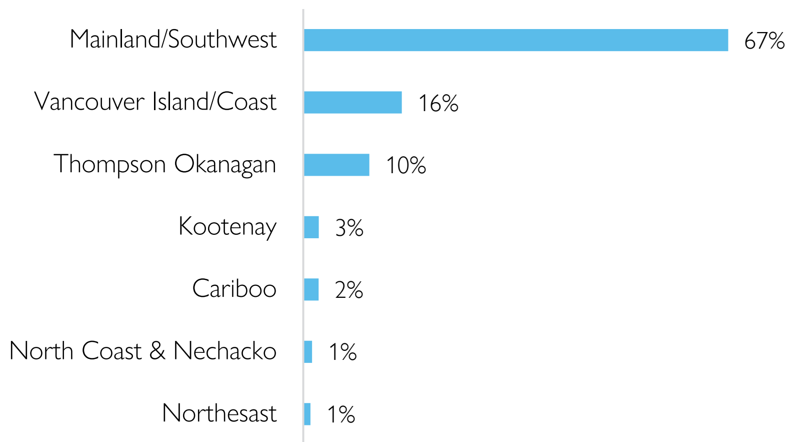
Question: What international worker recruitment program has your business used? n = 24

8 LABOUR AND EMPLOYMENT SITUATION

8.1 Tourism Labour Market in British Columbia

In 2019, the British Columbia tourism and hospitality sector employed around 310,000 people[59], about 12% of the provincial workforce.[60] 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 British Columbia (Exhibit 55).

Exhibit 55: 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.[61] Regional analysis demonstrates that 58% of British Columbia's tourism-related businesses were 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 (Exhibit 56).[62]

---

[59] Employment in the tourism and hospitality sector is generated by demand from both tourists and non-tourists (i.e., residents). In some sub-sectors, for example accommodation, the demand is mostly from tourists and in other sub-sectors, such as Food and Beverage, resident demand is greater than tourist demand especially in urban areas. Tourist and resident demand can change at different paces, subsequently affecting growth and recovery.

[60] 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

[61] Destination British Columbia. 2019. Value of Tourism Trends From 2007–2017.

[62] Note: The distribution of tourism-related employment and tourism businesses is summarized using slightly different regions because the BC Labour Market Outlook uses economic development regions while Destination BC uses tourism regions for analysis.

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 (58%), followed by the Transportation (16%), then Amusement, Gambling, and Recreation (10%) and Accommodation (10%) sectors.[63]

Exhibit 56: BC Tourism Businesses (Establishments) 2017

	2017	Growth Since 2014	Provincial Share
British Columbia	19,243	3%	100%
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 British Columbia expressed considerable concern about the impacts of labour shortages on their businesses. Over the past decade, the demand for workers in the British Columbia tourism industry started to significantly exceed supply. The demand-supply gap was projected to increase well into the future, that is until the COVID-19 worldwide pandemic was declared in March 2020. Until the pandemic struck, the development and expansion of world-class product offerings and sustained, focused marketing efforts were projected to stimulate annual revenue growth levels of 4-6% through to 2029 with job growth swelling to over 350,000 from 310,550 in 2019.[64] Globally, the tourism industry is anticipated to bounce back to 2019 numbers by 2025.[65]

A 2014 study conducted by Sentis Research[66] 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
- Reduced business hours of operations

[63] These sectors are assumed to be businesses primary area of operation.

[64] 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

[65] Destination Canada. 2020. Visitor Demand Forecast Update (November 2020). https://www.destinationcanada.com/sites/default/files/archive/1258-Destination%20Canada%27s%20Visitor%20Demand%20Forecast%20Update%20-%20November%202020/DC%20Forecast%20Update%20_Nov%202020_EN%20-%20FOR%20PUBLICATION.pdf

[66] As described in Grant Thornton and Econometric Research Limited. 2016. BC Tourism Labour Shortage Economic Impact Study Summary Report. https://www.go2hr.ca/wp-content/uploads/2017/07/go2HR-2016-Tourism-Labour-Shortage-Economic-Impact-Study.pdf

To investigate the impacts further, go2HR commissioned a study to investigate the economic impacts of British Columbia tourism labour market shortages. Grant Thornton and Econometric Research Limited conducted the study which confirmed that the British Columbia tourism industry is facing labour constraints that are impacting businesses.[67]

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.[68] The inability of these businesses to operate at full capacity due to labour shortages resulted in a projected top estimate of $1.03 billion 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%).
- 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, Northern BC, Kootenay Rockies, Vancouver Island and, lastly, the Cariboo Chilcotin Coast. The Vancouver Island region reported the lowest per business revenue loss resulting from labour shortages.

Exhibit 57 summarizes current challenges and trends in the British Columbia tourism labour market. Recent work by go2HR identified important trends and challenges impacting the British Columbia tourism labour market. Challenges range from those impacting all the British Columbia economy, like changing demographics and labour and skills shortages to those specific to the tourism industry, such as 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.

Exhibit 57: Challenges in the BC Tourism Labour Market

Challenge	Description
Changing Demographics	About a third of the British Columbia 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 British Columbia 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.

[67] Grant Thornton and Econometric Research Limited. 2016. BC Tourism Labour Shortage Economic Impact Study Summary Report.

[68] Grant Thornton and Econometric Research Limited. 2016. BC Tourism Labour Shortage Economic Impact Study Summary Report.

Challenge	Description
Seasonality	The nature of tourism products in British Columbia makes 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 (i.e., snow sports).
Small Businesses	Most tourism businesses in British Columbia 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 British Columbia 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	Some small tourism businesses have not traditionally considered human resources and training to be a key business imperative. Lack of consideration of these factors will negatively impact 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), and there is a need for businesses to participate in industry advisory committees and work experience / co-op programs. Also, it is necessary to ensure the K-12 education system has content and teaching resources about jobs and careers in tourism included in their 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 particularly true for small, rural communities.
Duplication of Efforts	Industry groups, DMOs, government, educators, economic development have all felt pressure to take action on the tourism 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

8.2 Indigenous Tourism Employment in British Columbia and Canada

Tourism HR Canada has provided 2016 Census data that describes Indigenous employment in the tourism industry in British Columbia and Canada. There were 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. These statistics refer to any Indigenous person working in a job that is classified as the tourism industry by Statistics Canada. This includes the Accommodation, Food and Beverage, Recreation and Entertainment, Transportation and Travel Services tourism sector.

In total, in 2016, there was 15,840 Indigenous people working in the tourism sector in British Columbia, which represents about 21% of Canadian Indigenous tourism employment in Canada.[69] British Columbia has the second largest Indigenous tourism workforce in Canada, just behind Ontario (Exhibit 58).

In British Columbia, 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%), and like British Columbia, both have increased their share from 2011.

In British Columbia, the Indigenous tourism workforce tends to be female and younger (<35 years old) compared to the non-Indigenous tourism workforce (Exhibit 59). In fact, 58% or 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 British Columbia (Exhibit 11).

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.

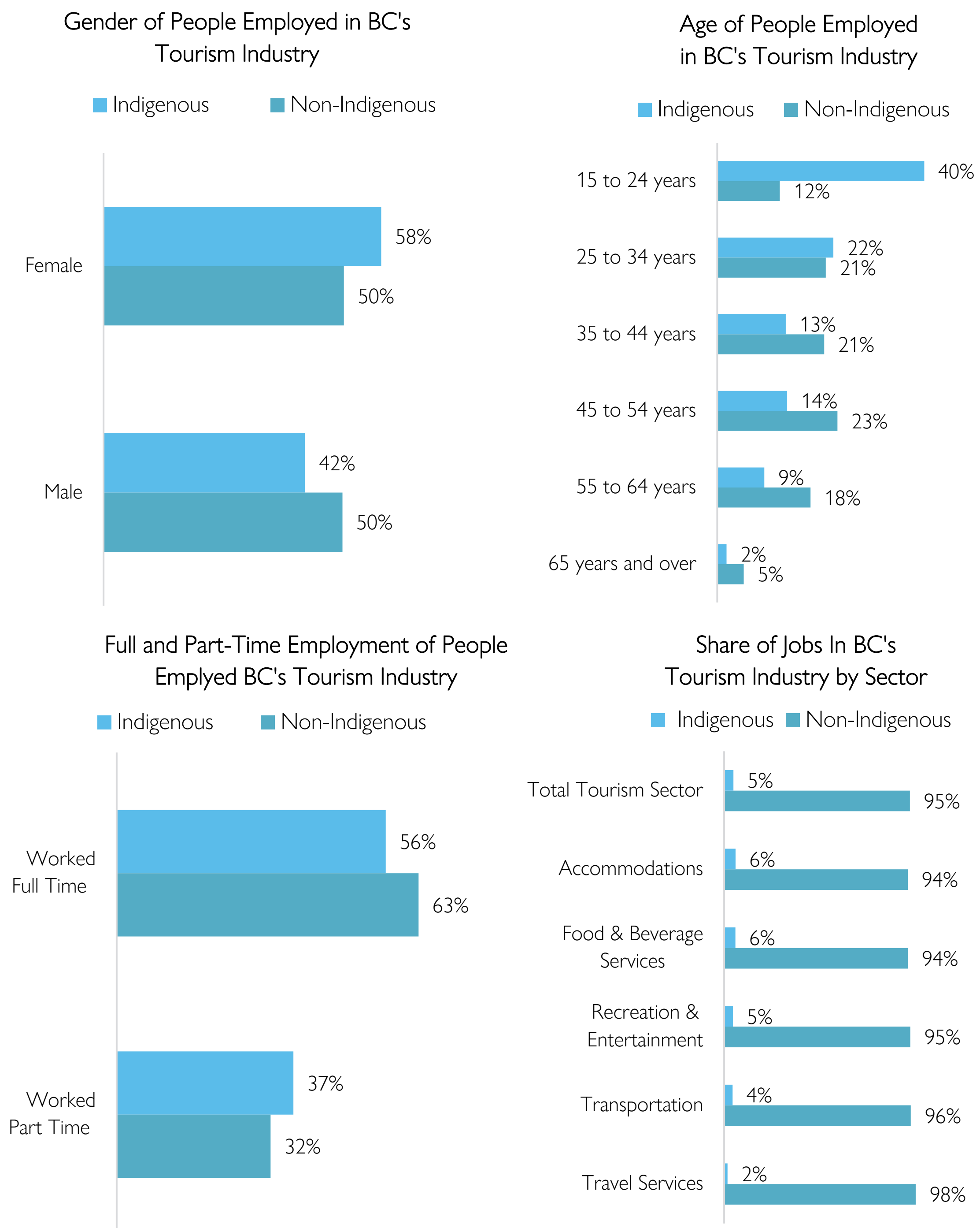
[69] This is the proportion of Indigenous people that are allocated to tourism from the list of tourism and hospitality occupations in BC.

Exhibit 58: Indigenous Tourism Workforce Regional Distribution 2016

	2016 Indigenous Tourism Workforce	Share of Provincial Tourism Labour Force	
		2016	2011
Canada	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.

Exhibit 59: 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 fill 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 mangers (4%, Exhibit 60).

The Indigenous people share[70] 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%, Exhibit 61).

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%, Exhibit 61).

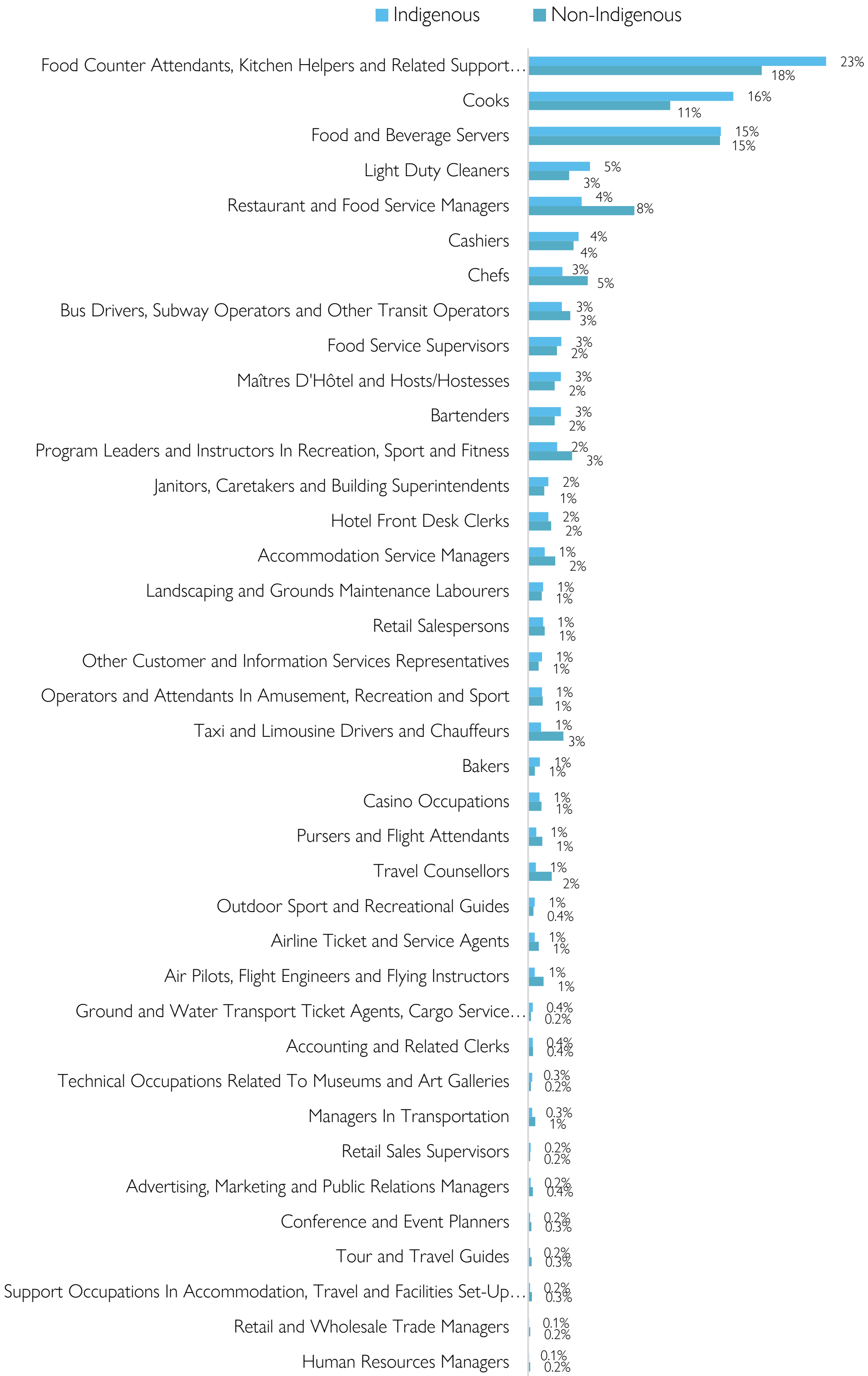
Tourism occupations for Indigenous people differ by age. Younger Indigenous people (<35 years old) are most likely to be employed as a food counter attendants, kitchen helpers, and related support workers (30%), cook (17%), food and beverage server (17%), cashier (5%) and a maitres d'hotel and host / hostess (4%,). 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 manger (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 mangers (11%) and tour and travel guides (11%, Exhibit 64).

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%, Exhibit 63). 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%, Exhibit 64).

[70] The Indigenous people share is the number of Indigenous people divided by the total number of people in each occupation.

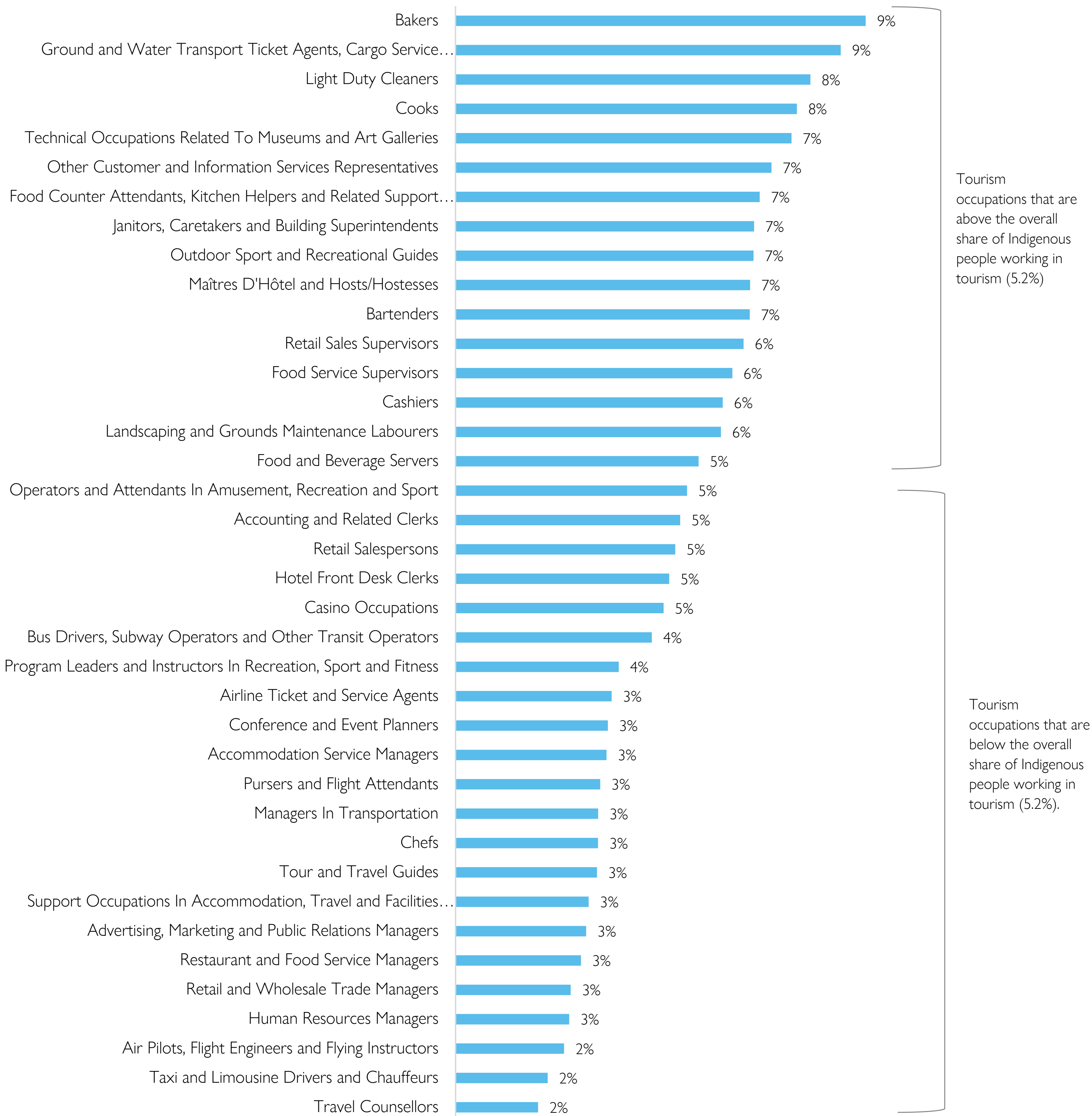
Exhibit 60: Distribution of Indigenous and Non-Indigenous Employment by Tourism Occupation, British Columbia 2016

(% of All Tourism Occupations)



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

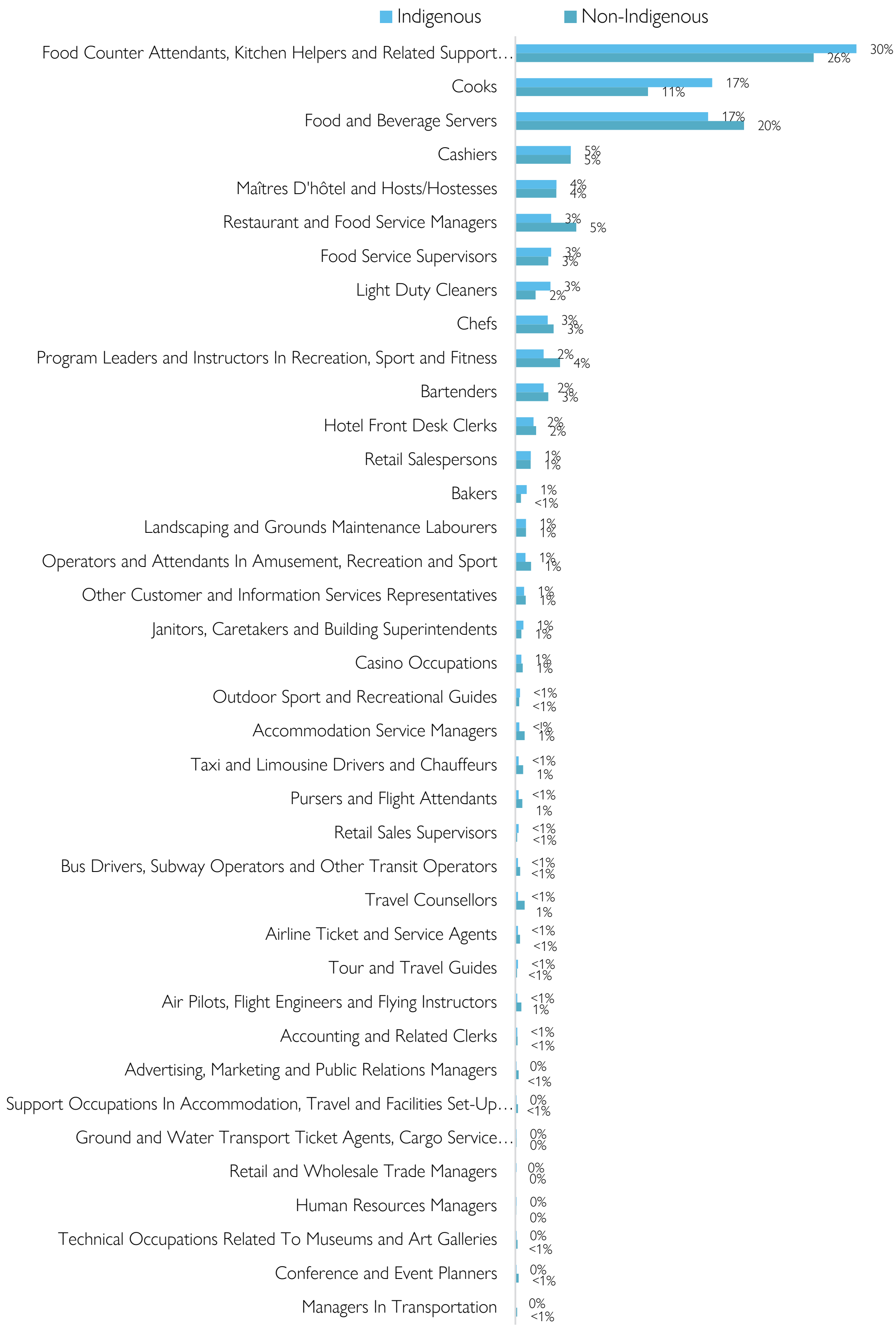
Exhibit 61: Indigenous People Share of Tourism Occupations in British Columbia 2016



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.

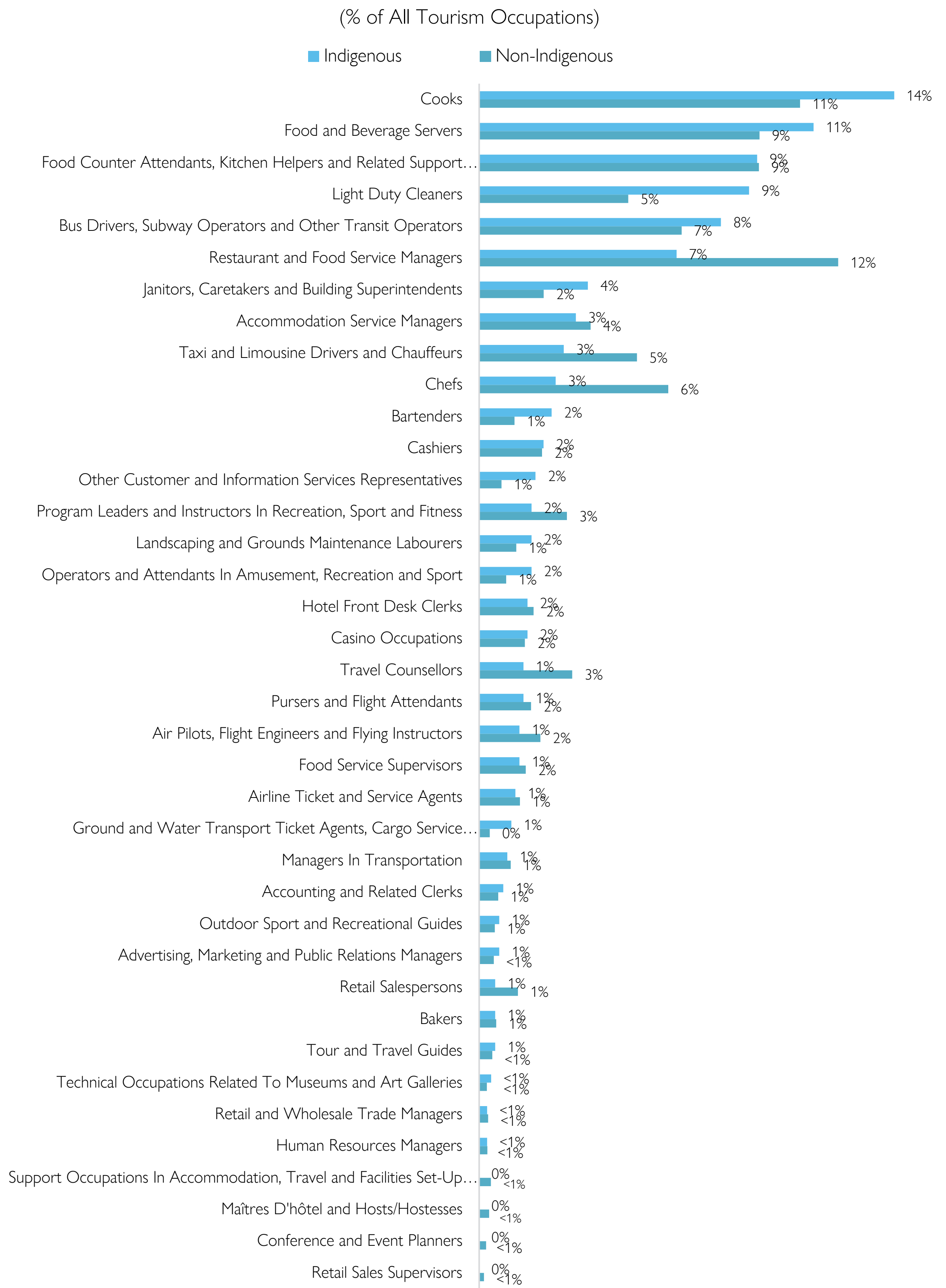
Exhibit 62: Distribution of Indigenous and Non-Indigenous Employment by Tourism Occupation, for Young People (Under 35), British Columbia 2016

(% of All Tourism Occupations)



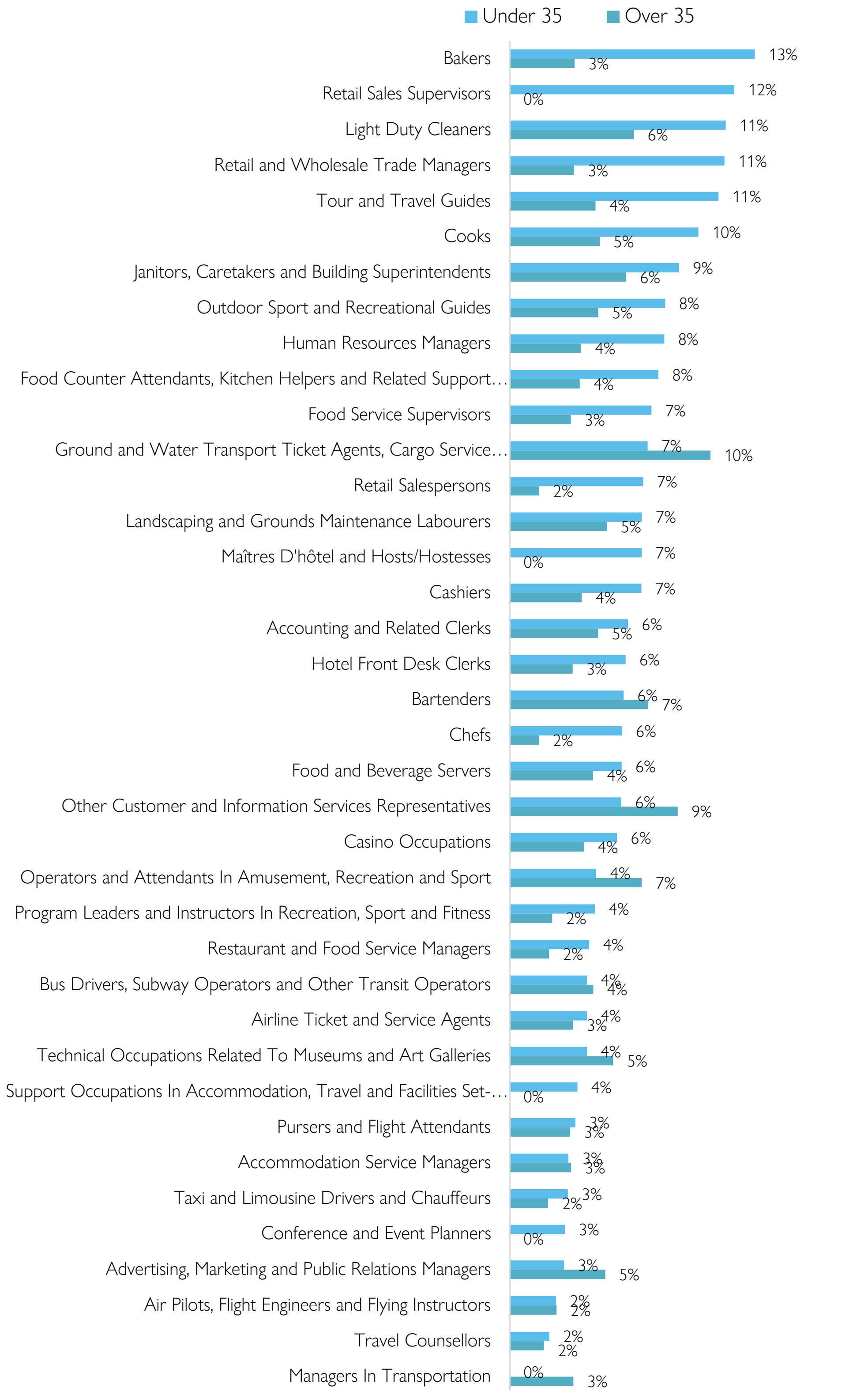
Source: Tourism HR Canada. Adapted from Statistics Canada, Customized Tabulations: Census 2016.

Exhibit 63: 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.

Exhibit 64: 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.

Statistics Canada 2016 Census data was also summarized for education-levels by tourism and hospitality occupations for both Indigenous and non-Indigenous people (Exhibit 65 and Exhibit 66).[71] Overall, most tourism occupations were filled with people with a high school degree (or less), followed by people with a trades or college certificate / diploma and finally a university degree. Indigenous people were more likely to have a high school degree (or less) or trades or college certificate / diploma compared to non-Indigenous people in similar occupations. Conversely, non-Indigenous people were more likely than Indigenous people to have a university degree for most tourism occupations. For example, for Travel Counsellors, more Indigenous people had a college certificate/diploma (63%) compared to non-Indigenous people (44%), whereas fewer Indigenous Travel Counsellors (11%) had a university degree than non-Indigenous Travel Counsellors (24%).

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.[72] 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:

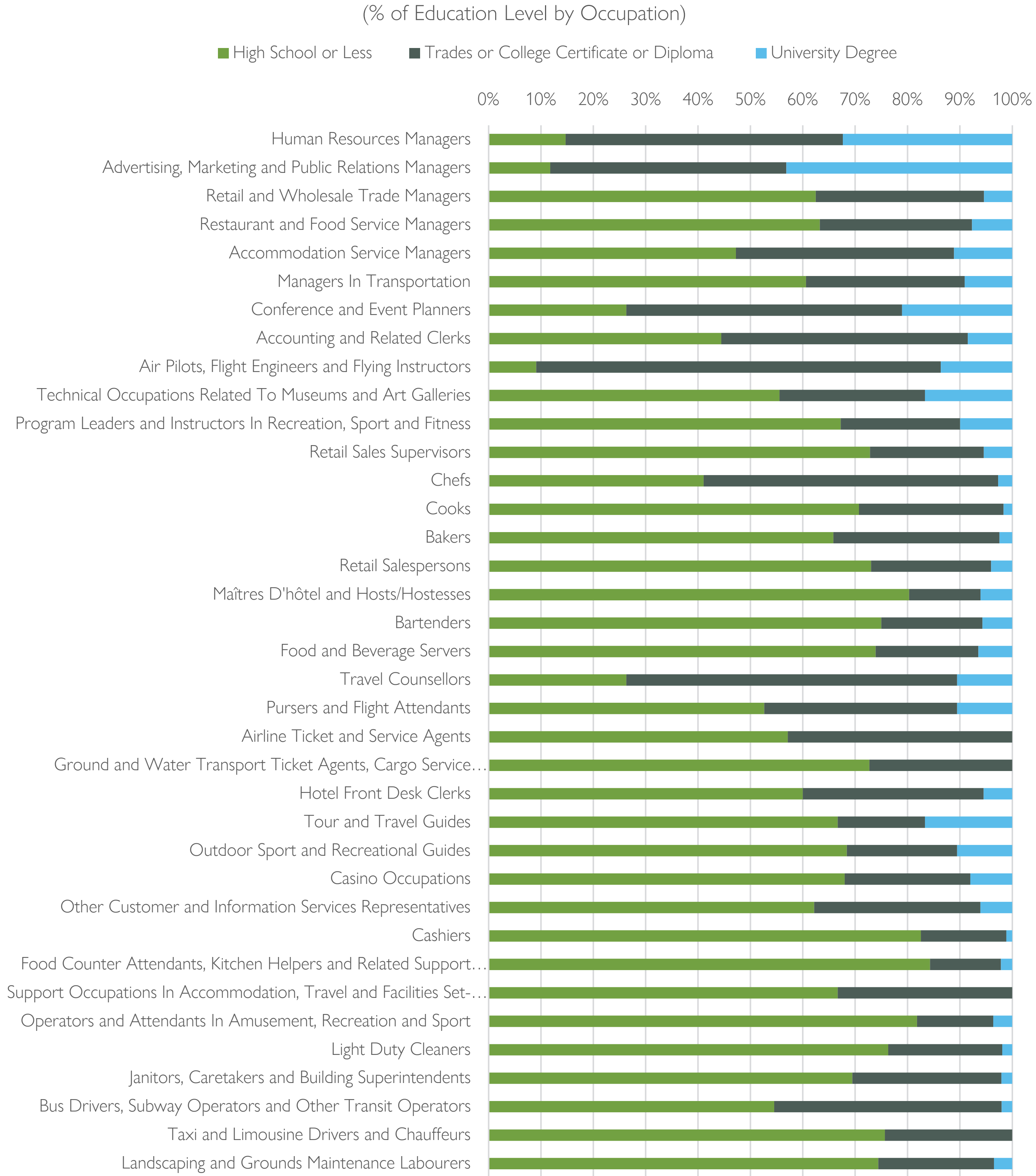
- Improve women's access to better quality jobs and promote equal access to opportunities.
- Promote women's education and training.
- Ensure women earn the same as men for equivalent work and commit to reduce the gender pay gap.
- Promote women's leadership.
- Provide attractive childcare, tax, social 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.

Travel and Tourism provides great opportunities for women's employment including in other labour, self-employment, arts and crafts, harvesting, etc.

[71] Source: Statistics Canada. National Occupational Classification (NOC) 2016 (691), Employment Income Statistics (3), Highest Certificate, Diploma or Degree (7), Aboriginal Identity (9), Work Activity During the Reference Year (4), Age (4D) and Sex (3) for the Population Aged 15 Years and Over Who Worked in 2015 and Reported Employment Income in 2015, in Private Households.

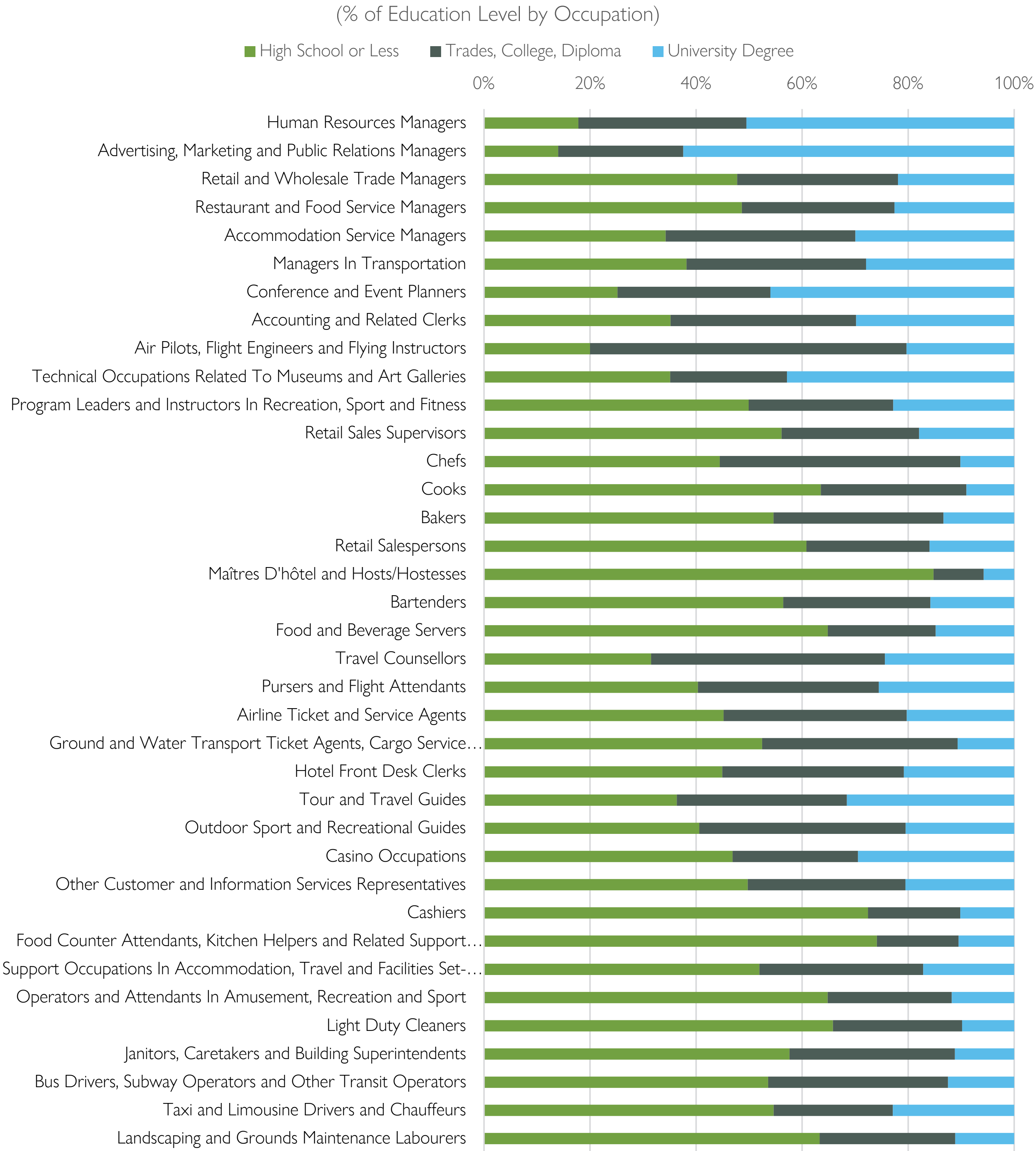
[72] World Travel & Tourism Council. 2019. Travel & Tourism: Driving Women's Success.

Exhibit 65: Distribution of Indigenous Worker Employment Level by Tourism Occupation, British Columbia 2016



Source: Statistics Canada. National Occupational Classification (NOC) 2016 (691), Employment Income Statistics (3), Highest Certificate, Diploma or Degree (7), Aboriginal Identity (9), Work Activity During the Reference Year (4), Age (4D) and Sex (3) for the Population Aged 15 Years and Over Who Worked in 2015 and Reported Employment Income in 2015, in Private Households.

Exhibit 66: Distribution of Non-Indigenous Worker Employment Level by Tourism Occupation, British Columbia 2016



Source: Statistics Canada. National Occupational Classification (NOC) 2016 (691), Employment Income Statistics (3), Highest Certificate, Diploma or Degree (7), Aboriginal Identity (9), Work Activity During the Reference Year (4), Age (4D) and Sex (3) for the Population Aged 15 Years and Over Who Worked in 2015 and Reported Employment Income in 2015, in Private Households.

8.3 Estimating the Current Size of the Indigenous Tourism Workforce

Employee data collected from the Indigenous Tourism Business survey was combined with the inventory of Indigenous tourism businesses to estimate total employment at all Indigenous Tourism Businesses in British Columbia. These estimates differ from census estimates provided in Section 8.2 of this report. The census data estimates Indigenous people working at all tourism businesses whereas these calculations include only people working at Indigenous-owned tourism businesses.

The total number employed at Indigenous tourism businesses in BC was roughly 4,248 in 2019.

Estimates by sub-sector and by region respectively were developed as well as the proportion in each sub-sector working full-time and part-time (Exhibit 67). The largest employer amongst the Indigenous tourism sectors is businesses providing Accommodation services, which accounts for almost 35% of the total employment. Employment in Food and Beverage accounts for 23% followed by employment in Outdoor Adventure (15%). The Retail sector, when Gas Stations are included, also supplies one in five jobs.

Exhibit 67: Estimated Employment by Tourism Sub-Sector

		% of	% of Sub-Sector Total			
	Employed	Province Total	FT	% FT	PT	% PT
Attraction	233	5%	152	65%	81	35%
Accommodations	1,484	35%	904	61%	580	39%
Outdoor Adventure	637	15%	367	58%	271	42%
Food and Beverage	971	23%	442	46%	528	54%
Retail	372	9%	207	56%	164	44%
Gas	478	11%	379	79%	99	21%
Transportation	73	2%	53	72%	20	28%
Provincial Total	4,248	100%	2,505	59%	1,743	41%

Source: O'Neil Marketing & Consulting

The region that employed the most people in Indigenous tourism businesses is Vancouver Island, accounting for more than one-quarter (27%) of the total employed in the province, followed by the Vancouver, Coast and Mountains (25%) and the Kootenay Rockies (9%). As Indigenous tourism businesses are more likely to be in remote and rural areas, it is no surprise that employment in Cariboo Chilcotin Coast (CCC) and Northern BC together account for more than one-quarter of Indigenous Tourism employment in British Columbia.

Exhibit 68: Estimated Employment by BC Tourism Region

	Employed	% of Province Total	% of Sub-Sector Total			
			FT	% FT	PT	% PT
Vancouver Coast and Mountains	1,057	25%	559	53%	498	47%
Vancouver Island	1,143	27%	726	63%	417	37%
Cariboo Chilcotin Coast	493	12%	372	75%	121	25%
Thompson Okanagan	516	12%	260	50%	255	50%
Kootenay Rockies	389	9%	181	47%	208	53%
Northern BC	650	15%	407	63%	243	37%
Provincial Total	4,248	100%	2,505	59%	1,743	41%

Source: O'Neil Marketing & Consulting

As the emphasis of the labour market study is to collect the data and conduct the analysis to guide a workforce development strategy, detailed employment data by occupation was collected. Survey results were manually coded to the National Occupational Classifications (NOC), and cross tabulated by sub-sector (see Appendix G for NOC listing). Employment by NOC in the Indigenous tourism sector in British Columbia is illustrated in Exhibit 69, along with the proportion working full-time and part-time in each occupation.

Exhibit 69: Employment by National Occupational Code (NOC) in Indigenous Tourism

	Employed	% of Province Total	% of Occupation Total			
			FT	% FT	PT	% PT
Restaurant and Food Service Managers	519	12%	207	40%	312	60%
Service Station Attendants	410	10%	298	73%	111	27%
Tour and Travel Guides	331	8%	200	60%	131	40%
Retail and Wholesale Trade Managers	278	7%	212	76%	66	24%
Food and Beverage Servers	262	6%	148	56%	114	44%
Outdoor Sport and Recreational Guides	245	6%	180	73%	66	27%
Retail Salesperson	243	6%	142	58%	101	42%
Light Duty Cleaners	200	5%	110	55%	90	45%
Cooks	199	5%	125	63%	74	37%
Accommodation Service Managers	186	4%	161	86%	25	14%
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	185	4%	106	58%	78	42%
Hotel Front Desk Clerks	154	4%	85	55%	69	45%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	138	3%	87	63%	51	37%
Janitors, Caretakers and Building Superintendents	116	3%	43	38%	72	62%
Landscaping and Grounds Maintenance Labourers	98	2%	46	46%	52	54%
Technical Occupations Related to Museums and Art Galleries	88	2%	15	17%	73	83%
Bus Drivers, Subway Operators and Other Transit Operators	66	2%	31	48%	34	52%
Cashiers	62	1%	34	54%	28	46%
Chefs	56	1%	43	77%	13	23%
Boat and Cable Ferry Operators and Related Occupations	35	1%	18	50%	18	50%
Security Guards and Related Security Service Occupations	32	1%	17	52%	16	48%
Administrative Assistant	30	1%	28	92%	3	8%
Library, Archive, Museum and Art Gallery Managers	23	1%	18	78%	5	22%
Artisans and Craftspersons	23	1%	5	22%	18	78%
Other Customer and Information Services Representatives	21	<1%	18	83%	4	17%
Public Works Maintenance Equipment Operators and Related Workers	20	<1%	10	50%	10	50%
Accommodation, Travel, Tourism and Related Services Supervisors	20	<1%	15	77%	5	23%
Conference and Event Planners	19	<1%	4	19%	15	81%

	Employed	% of Province Total	% of Occupation Total			
			FT	% FT	PT	% PT
Operators and Attendants in Amusement, Recreation and Sport	18	<1%	18	100%	0	0%
Accounting Technicians and Bookkeepers	17	<1%	7	41%	10	59%
Harvesting Labourers	15	<1%	0	0%	15	100%
Transport Truck Drivers	15	<1%	5	33%	10	67%
Other Managers	14	<1%	14	100%	0	0%
Dancers	13	<1%	0	0%	13	100%
Other Services Supervisors	13	<1%	7	52%	6	48%
Professional Occupations in Advertising, Marketing and Public Relations	9	<1%	4	41%	5	59%
Bartenders	9	<1%	5	59%	4	41%
Accounting and Related Clerks	8	<1%	7	88%	1	12%
Receptionists	8	<1%	8	100%	0	0%
General Office Support Workers	8	<1%	3	33%	5	67%
Program Leaders and Instructors in Recreation, Sport and Fitness	7	<1%	2	28%	5	72%
Administrative Officers	6	<1%	4	58%	3	42%
Social Workers	5	<1%	3	50%	3	50%
Executive Housekeepers	5	<1%	5	100%	0	0%
Executive Assistants	5	<1%	5	100%	0	0%
Financial Managers	4	<1%	4	100%	0	0%
Employment Coordinator	3	<1%	0	0%	3	100%
Lawyers and Quebec Notaries	3	<1%	0	0%	3	100%
Delivery and Courier Service Drivers	3	<1%	0	0%	3	100%
Massage Therapists	3	<1%	3	100%	0	0%
Purchasing and Inventory Control Workers	3	<1%	0	0%	3	100%
Provincial Total	4,248	100%	2,505	59%	1,743	41%

Source: O'Neil Marketing & Consulting

8.4 Labour Forecast

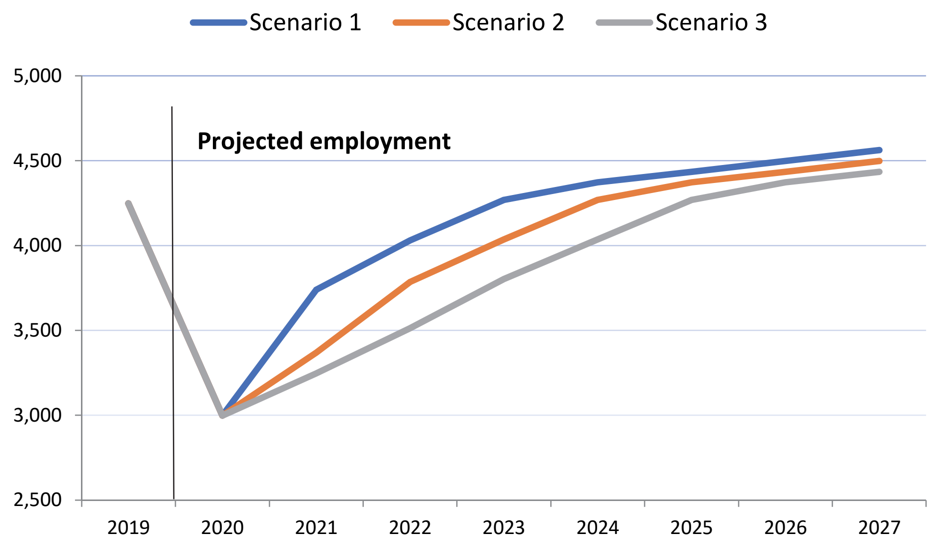
Developing tourism labour market forecasts in a global pandemic is very challenging given the uncertainty of the near-medium term future. Therefore, a scenario-based approach was used to estimate future Indigenous tourism employment. The scenarios were developed in alignment with a recent Conference Board of Canada's analysis[73] of the

[73] Tourism [74] It is noted that while the research team realize that some sub-sectors may experience employment growth over the next few years slightly differently from others due to the nature of the difference in tourism demand, employment growth in sub-sectors have been projected to be the same over the projection period (2020 to 2027) due to the size of the workforce in the sub-sectors. It is also noted that

impact of the COVID-19 pandemic on tourism sector employment in British Columbia. Subsequently, a range of projections were developed according to one of the following three scenarios:

- Scenario 1: Return to 2019 Employment Levels in 2023
- Scenario 2: Return to 2019 Employment Levels in 2024
- Scenario 3: Return to 2019 Employment Levels in 2025

Exhibit 70: Projected Indigenous Tourism Sector Employment in BC, 2020 to 2027



Source: O'Neil Marketing & Consulting

Exhibit 71: Projected Indigenous Tourism Sector Returning to 2019 Employment in BC, 2020 to 2027

	2019	2020	2021	2022	2023	2024	2025	2026	2027
Scenario 1: Return in 2023	4,248	2,999	3,740	4,030	4,269	4,372	4,435	4,498	4,563
Projected rate of growth / decline		*-29%*	*25%*	*8%*	*6%*	*2%*	*1%*	*1%*	*1%*
Scenario 2: Return in 2024	4,248	2,999	3,370	3,786	4,036	4,269	4,372	4,435	4,498
Projected rate of growth / decline		*-29%*	*12%*	*12%*	*7%*	*6%*	*2%*	*1%*	*1%*
Scenario 3: Return in 2025	4,248	2,999	3,246	3,513	3,803	4,036	4,269	4,372	4,435
Projected rate of growth / decline		*-29%*	*8%*	*8%*	*8%*	*6%*	*6%*	*2%*	*1%*

Source: O'Neil Marketing & Consulting

Scenario 1: Return to 2019 Employment Levels in 2023

Under the first scenario, employment in the Indigenous tourism sector is expected to suffer a loss of almost 30% in 2020, before returning to 2019 employment levels by 2023. Employment growth in 2024 and 2025 are projected to be a modest 2% and 1% respectively. By 2027, employment in the Indigenous tourism is projected to be about 4,560.

any change in business formation in the future can substantially change the size of the sector. Therefore, employment projections shown here should be considered to indicate the order of magnitude.

Scenario 2: Return to 2019 Employment Levels in 2024

In this second scenario, employment in the Indigenous tourism sector is expected to suffer a loss of almost 30% in 2020, before returning to 2019 employment levels by 2024. Employment growth in 2025 and 2026 are projected to be a modest 2% and 1% respectively. By 2027, employment in the Indigenous tourism is anticipated to be about 4,500.

Scenario 3: Return to 2019 Employment Levels in 2025

In this third scenario, employment in the Indigenous tourism sector is expected to suffer a loss of almost 30% in 2020, before returning to 2019 employment levels by 2025. Employment growth in 2026 and 2027 are projected to be a modest 2% and 1% respectively. By 2027, employment in the Indigenous tourism sector is projected to be about 4,440.

Exhibit 70 to Exhibit 74 presents employment projections in the Indigenous tourism by sub-sector, by region, and by occupation, based on the province-wide Scenario 2 where employment is projected to return to 2019 levels by 2024.[74]

Exhibit 72: Projected Indigenous Tourism Employment by Sub-Sector 2020 to 2027

	2019	2020	2021	2022	2023	2024	2025	2026	2027
Attraction	233	164	185	207	221	234	239	243	246
Accommodations	1,484	1,048	1,177	1,323	1,410	1,492	1,528	1,550	1,572
Outdoor Adventure	637	450	505	568	605	640	656	665	675
Food and Beverage	971	686	770	865	922	976	999	1,014	1,028
Retail	372	262	295	331	353	374	383	388	394
Gas	478	337	379	426	454	480	492	499	506
Transportation	73	52	58	65	70	74	75	77	78
Provincial Total	4,248	2,999	3,370	3,786	4,036	4,269	4,372	4,435	4,498

Source: O'Neil Marketing & Consulting

[74] It is noted that while the research team realize that some sub-sectors may experience employment growth over the next few years slightly differently from others due to the nature of the difference in tourism demand, employment growth in sub-sectors have been projected to be the same over the projection period (2020 to 2027) due to the size of the workforce in the sub-sectors. It is also noted that any change in business formation in the future can substantially change the size of the sector. Therefore, employment projections shown here should be considered to indicate the order of magnitude.

Exhibit 73: Projected Indigenous Tourism Employment by Region 2020 to 2027

	2019	2020	2021	2022	2023	2024	2025	2026	2027
Vancouver Coast and Mountains	1,057	746	838	942	1,004	1,062	1,088	1,103	1,119
Vancouver Island	1,143	807	907	1,018	1,086	1,149	1,176	1,193	1,210
Cariboo Chilcotin Coast	493	348	391	439	468	496	507	515	522
Thompson Okanagan	516	364	409	460	490	518	531	538	546
Kootenay Rockies	389	275	309	347	370	391	401	407	412
Northern BC	650	459	515	579	617	653	669	678	688
Provincial Total	4,248	2,999	3,370	3,786	4,036	4,269	4,372	4,435	4,498

Source: O'Neil Marketing & Consulting

Exhibit 74: Projected Indigenous Tourism Employment by Occupation 2020 to 2027

	2019	2020	2021	2022	2023	2024	2025	2026	2027
Restaurant and Food Service Managers	519	367	412	463	493	522	534	542	550
Service Station Attendants	410	289	325	365	389	412	422	428	434
Tour and Travel Guides	331	234	263	295	315	333	341	346	351
Retail and Wholesale Trade Managers	278	196	221	248	264	280	286	290	295
Food and Beverage Servers	262	185	207	233	248	263	269	273	277
Outdoor Sport and Recreational Guides	245	173	195	219	233	246	252	256	260
Retail Salesperson	243	171	193	216	231	244	250	253	257
Light Duty Cleaners	200	142	159	179	190	201	206	209	212
Cooks	199	141	158	177	189	200	205	208	211
Accommodation Service Managers	186	131	148	166	177	187	191	194	197
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	185	130	146	164	175	185	190	193	195
Hotel Front Desk Clerks	154	108	122	137	146	154	158	160	163
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	138	98	110	123	132	139	143	145	147
Janitors, Caretakers and Building Superintendents	116	82	92	103	110	116	119	121	122
Landscaping and Grounds Maintenance Labourers	98	69	78	87	93	98	101	102	104
Technical Occupations Related to Museums and Art Galleries	88	62	70	79	84	89	91	92	94
Bus Drivers, Subway Operators and Other Transit Operators	66	46	52	59	62	66	68	69	70
Cashiers	62	44	49	55	59	62	64	65	66
Chefs	56	40	44	50	53	56	58	59	59

	2019	2020	2021	2022	2023	2024	2025	2026	2027
Boat and Cable Ferry Operators and Related Occupations	35	25	28	32	34	36	36	37	37
Security Guards and Related Security Service Occupations	32	23	26	29	31	32	33	34	34
Administrative Assistant	30	21	24	27	29	30	31	32	32
Library, Archive, Museum and Art Gallery Managers	23	16	18	20	22	23	23	24	24
Artisans and Craftspersons	23	16	18	20	22	23	23	24	24
Other Customer and Information Services Representatives	21	15	17	19	20	21	22	22	22
Public Works Maintenance Equipment Operators and Related Workers	20	14	16	18	19	20	21	21	21
Accommodation, Travel, Tourism and Related Services Supervisors	20	14	16	18	19	20	20	21	21
Conference and Event Planners	19	13	15	17	18	19	19	20	20
Operators and Attendants ini Amusement, Recreation and Sport	18	12	14	16	17	18	18	18	19
Accounting Technicians and Bookkeepers	17	12	14	15	16	17	18	18	18
Harvesting Labourers	15	11	12	14	14	15	16	16	16
Transport Truck Drivers	15	11	12	14	14	15	16	16	16
Other Managers	14	10	11	12	13	14	14	15	15
Dancers	13	9	10	11	12	13	13	13	13
Other Services Supervisors	13	9	10	11	12	13	13	13	13
Professional Occupations in Advertising, Marketing and Public Relations	9	6	7	8	8	9	9	9	9
Bartenders	9	6	7	8	8	9	9	9	9
Accounting and Related Clerks	8	6	6	7	8	8	8	8	9
Receptionists	8	5	6	7	7	8	8	8	8
General Office Support Workers	8	5	6	7	7	8	8	8	8
Program Leaders and Instructors in Recreation, Sport and Fitness	7	5	6	6	7	7	7	7	7
Administrative Officers	6	4	5	5	6	6	6	6	6
Social Workers	5	4	4	5	5	5	5	5	5
Executive Housekeepers	5	4	4	5	5	5	5	5	5
Executive Assistants	5	3	4	4	4	5	5	5	5
Financial Managers	4	2	3	3	3	4	4	4	4
Employment Coordinator	3	2	2	2	2	3	3	3	3
Lawyers and Quebec Notaries	3	2	2	2	2	3	3	3	3
Delivery and Courier Service Drivers	3	2	2	2	2	3	3	3	3
Massage Therapists	3	2	2	2	2	3	3	3	3

	2019	2020	2021	2022	2023	2024	2025	2026	2027
Purchasing and Inventory Control Workers	3	2	2	2	2	3	3	3	3
Provincial Total	4,248	2,999	3,370	3,786	4,036	4,269	4,372	4,435	4,498

Source: O'Neil Marketing & Consulting

8.5 Economic Impact of Indigenous Tourism Sector on B.C.'s Provincial Economy

As cited in Section 3.2 Value of Indigenous Tourism, the Indigenous Tourism Association of Canada (ITAC) conducted research on the state of the Indigenous tourism activity across provinces and territories in Canada in 2018. The economic impact assessment was provided in a resulting report indicating that Indigenous tourism in BC directly generated just under 7,000 jobs and contributed $260.3 million in GDP to the provincial economy in 2017.

It should be noted that the type of businesses in the ITAC study are different from those defined in this report, and as such, the number of businesses and the number of employed calculated here are not comparable with the ITAC study.

In this section the economic impact of Indigenous tourism sector to the provincial is presented by using the provincial and territorial input-output multipliers published by Statistics Canada for 2017.[75] For a description of the input-output model of the Canadian and provincial and territorial economy, refer to Appendix F. The type of economic impact to be estimated for this study include:

- Direct Impact – measures the increase in industrial output and the increase in an industry's labour force resulting from the demand for Indigenous tourism products and services.
- Indirect Impact – measures the change in industrial output and employment demand in sectors that supply goods and services to sectors of the economy that are directly impacted.
- Induced Impact – measures the changes in output and employment demand over all sectors of the economy as a result of an income increase in households impacted both directly and indirectly.

Exhibit 75 and Exhibit 76 illustrates economic impact of Indigenous tourism in terms of its contribution to provincial GDP, labour income, and revenue. Direct impact shows the various sub-sectors directly impacted, while total impact shows the combined direct, indirect, and induced impact on the economy due to the increase in demand for Indigenous tourism products and services.

Both direct and total impact show that the Accommodation sector had the largest economic impact in 2019 followed by Retail-Gas, Food and Beverage, Outdoor Adventure, Retail, Transportation, and Attraction sectors.

[75] Statistics Canada. Table 36-10-0595-01 Input-output multipliers, provincial and territorial, detail level

Exhibit 75: Direct Economic Impact of the Indigenous Tourism Sector on BC's Economy 2019

	Jobs	GDP at factor cost	Labour Income	Revenue
Attraction	233	$8.7 million	$6.4 million	$16.8 million
Accommodations	1,484	$101.0 million	$56.7 million	$171.2 million
Outdoor Adventure	637	$23.9 million	$17.6 million	$49.8 million
Food and Beverage	971	$30.1 million	$25.4 million	$68.5 million
Retail	372	$13.7 million	$11.0 million	$26.9 million
Gas	478	$61.9 million	$15.4 million	$83.9 million
Transportation	73	$8.4 million	$5.4 million	$18.3 million
Provincial Total	4,248	$247.7 million	$137.9 million	$435.4 million

Source: O'Neil Marketing & Consulting

Exhibit 76: Total Economic Impact of the Indigenous Tourism Sector on BC's Economy 2019

	Jobs	GDP at factor cost	Labour Income	Revenue
Attraction	324	$15.8 million	$10.4 million	$29.2 million
Accommodations	2,068	$162.3 million	$87.0 million	$274.6 million
Outdoor Adventure	872	$47.7 million	$30.0 million	$89.4 million
Food and Beverage	1,237	$57.6 million	$38.9 million	$116.5 million
Retail	493	$28.4 million	$17.7 million	$50.9 million
Gas	679	$83.8 million	$26.4 million	$120.3 million
Transportation	162	$18.5 million	$11.0 million	$36.7 million
Provincial Total	5,835	$414.0 million	$221.2 million	$717.6 million

Source: O'Neil Marketing & Consulting

9 INDIGENOUS AND INDUSTRY NETWORK

There is a strong, established and expanding Indigenous support system for Indigenous business and industry sectors, employment, and training in British Columbia, of which some focus exclusively on women and youth. In addition to these, there are cultural and social programs managed by Indigenous organizations that control the focus and operations. These initiatives promote the revitalization and preservation of Indigenous languages and cultures, while other programs focus on improving housing, health, and infrastructure.

The following is an overview of these Indigenous networks and their programs.

9.1 Indigenous Employment Skills and Training Services

Indigenous people throughout British Columbia can access employment services through a network of Indigenous or Métis controlled service providers. These are called Indigenous Employment Skills and Training (ISETS) agencies. In British Columbia there are 20 ISETS of which 19 provide services to Indigenous people and 1 is Métis focused (Exhibit 77).

All these are funded by Service Canada through multi-year contracts. Priorities for each are also set by their Board of Directors, which are commonly driven by Band strategies that include primary industries and major projects. As for the Métis ISET, it is owned by the Métis Nation BC (MNBC), which administers its employment services through a network of employment agents connected with its regional chapters.

Each ISET has apprenticeable trades training priorities, and usually offer technical and certificate workshops. They also often partner with post-secondary schools to design courses for Indigenous people.

ISETS also support employers with finding skilled labour and can provide employer subsidies. They may offer the employer and Indigenous employee post-employment supports such as counsellors or job coaches, sponsor additional certification and training, and fund the employee's safety equipment and required small tools.

Exhibit 77: BC Indigenous Employment Skills and Training (ISETs)

Tourism Region[76]	Indigenous Group	Delivery Organization	Location
Provincial (BC)	Women	British Columbia Native Women's Assoc. (BCNWA)	Kamloops
	Métis	Métis Nation of British Columbia (MNBC)	Surrey
Cariboo Chilcotin Coast	First Nations	Cariboo Chilcotin Aboriginal Training Employment Centre Society (CCATEC)	Williams Lake
	First Nations	Mid Coast First Nations Society (MCFNTS)	Bella Bella
Kootenay Rockies	First Nations	Ktunaxa Nation Council	Cranbrook

[76] See BC tourism regions map in Appendix B.

Tourism Region[76]	Indigenous Group	Delivery Organization	Location
Northern BC	First Nations	Nisga'a Employment Skills and Training (NEST)	New Aiyansh
	First Nations	North East Native Advancing Society (NENAS)	Fort St. John
	First Nations	Prince George Nechako Aboriginal Employment and Training Association (PGNAETA)	Prince George
	First Nations	Tribal Resources Investment Corporation (TRICORP)	Prince Rupert
Thompson Okanagan	First Nations	Okanagan Training and Development Council (OTDC)	Kelowna
	First Nation	Shuswap Nation Tribal Council	Kamloops
Vancouver Coast and Mountains	Urban / Non-affiliated	Aboriginal Community Career Employment Services Society (ACCESS)	West Vancouver
	First Nations	Lil̓wat Nation	Mount Currie
	First Nations	Musqueam, Squamish and Tsleil-Waututh (MST)	Vancouver
	First Nations	Sechelt First Nation	Sechelt
	First Nations	Sto:Lo Aboriginal Skills and Employment Training (SASET)	Chilliwack
	First Nations	Tsawwassen First Nation	Tsawwassen
Vancouver Island	First Nations	Coast Salish Employment & Training Society (CSETS)	Duncan
	First Nations	North Vancouver Island Aboriginal Training Society (NVIATS)	Campbell River
	First Nations	Nuu-chah-nulth Employment and Training Program (NETP)	Port Alberni

ACCESS is the metro Vancouver area urban employment agency. It offers employment related services to Indigenous people (status and non-status) residing in its catchment area, and partners with First Nation and educational institutes. These include apprenticeable trades schools which offer trades training. ACCESS also administers the provincial BladeRunners program which provides life skills, job readiness skills, work experience / on-the-job training, job coaching and ongoing supports to unemployed youth at risk. Its employment-related training and supports for youth cover certification courses such as WHMIS, WCB Awareness and First Aid Level 1, matched with job coaching 24/7, workplace communication, and job placement opportunities. ACCESS administers BladeRunners programs throughout British Columbia and have included programs in tourism and hospitality, and partnership with Indigenous Tourism BC.

Many ISETS also offers individual Essential Skills (ES) assessments to plan the supports or skills the individual needs to be successful in their preferred education or occupation. These assessments align with the National Occupational Codes job descriptions.

9.2 Education and Training

Post-secondary institutes in British Columbia have reframed a number of their programs to incorporate aspects to support the Indigenous learner. There are now courses in tourism and business (amongst other industries and occupations) in British Columbia designed to incorporate Indigenous culture and values known to promote Indigenous learner's success. There are also two Indigenous owned and controlled registered post-secondary institutes in British Columbia – Nicola Valley Institute of Technology (NVIT) in Merritt and Burnaby, and the Native Education College (NEC) in Vancouver.

There are a few public post-secondary schools and tourism related programs in British Columbia of significance to Indigenous tourism. These are:

- Nicola Valley Institute of Technology (NVIT) – is a fully-owned Indigenous post-secondary school, which in 2019 under Chef Andrew George (Wet'suwet'en) it upgraded the Professional Cook / Chef training program to create a unique Indigenous culinary arts program in partnership with Okanagan University and Industry Training Authority of BC (ITA). The course maintains 70% of the apprenticeable trade standard requirements and fuses culinary skills with Indigenous culture and foods. George sources many of the ingredients from local Indigenous farmers and harvesters, and invites Chefs of other cultures to teach their culinary skills. The overall program includes a youth initiative designed to inspire youth to pursue careers in the culinary world.
- Native Education College (NEC) – is the founder of the FirstHost Hospitality and Training program, modeled after the provincial SuperHost curriculum. It incorporates the Indigenous Hawaiian hospitality philosophies of Dr. George Kanahali. NEC offers courses in Indigenous tourism operations, Indigenous tourism management, office administration and employment training, fine arts, and adult upgrading, plus other courses of importance to the Indigenous community.
- Occupational Health and Safety – the go2HR helps tourism and hospitality employers with their HR needs in areas such as occupational health and safety, customer service training, recruitment, retention and labour shortages, employment-related policy and legislation, and labour market research. It also promotes jobs and careers in tourism, hosts the British Columbia tourism job board and helps businesses provide remarkable customer experiences through its signature SuperHost suite of training courses. Complementing these programs, the Justice Institute of BC provides emergency, safety and justice training that some tourism sectors require.
- Indigenous cultural programs – Institutes outside of the lower mainland more often offer Indigenous culture and / or language programs that reflect the Indigenous Nation on whose lands these institutes are situated.
- Indigenous learner support – Several non-Indigenous post-secondary institutes throughout British Columbia have targeted programs designed for the Indigenous learner. In addition, nearly every non-Indigenous post-secondary Institute had easily identifiable support and services for Indigenous students.
- Partnership – Vancouver Island University in Nanaimo and Thompson Rivers University in Kamloops are two institutions that partnered with area Indigenous Nations to customize Indigenous tourism education programs.
- Business and Management – SFU developed a First Nations Business Administration MBA program, and UBC created the Ch'nook Indigenous Business Administration program which provides business training in Vancouver and in First Nation communities, as well as scholarship programs.

Exhibit 78: BC Post-Secondary Institutes

Tourism Region	Post-Secondary Institute	Location	Tourism, Hospitality	Business	Human Resources	Culinary Arts, Prof. Cook	Indigenous Culture & Language	Adult Basic Education ABE	Arts, Archaeology, Anthropology	Youth - Unique program	Industry Certific. / Workforce Training	Safety	Website
VCM	BC Institute of Technology BCIT	Burnaby	✓	✓	✓								www.bcit.ca
VI	Camosun College	Victoria		✓	✓	✓			✓				www.camosun.ca
VCM	Canadian Tourism College	Vancouver	✓										www.tourismcollege.com
VCM	Capilano University	North Vancouver	✓	✓			✓						www.capilanou.ca
NBC	Coast Mountain College	Prince Rupert	✓	✓		✓	✓		✓	✓			www.coastmountaincollege.ca
CCC	College of New Caledonia	Prince George, Burns Lake, Mackenzie, Quesnel, Vanderhoof	✓	✓	✓								www.cnc.bc.ca
KR	College of the Rockies	Cranbrook	✓	✓		✓	✓	✓	✓		✓		www.cotr.bc.ca
VCM	Douglas College	New Westminster, Burnaby	✓	✓	✓								www.douglascollege.ca
VCM	Fairleigh Dickinson University	Vancouver	✓	✓									www.fdu.edu
VCM	go2HR	Vancouver	✓								✓	✓	www.go2HR.ca
VCM	Justice Institute of BC	New Westminster									✓	✓	www.jibc.ca
VCM	Kwantlen Polytechnic University	Richmond, Abbotsford	✓	✓	✓	✓	✓	✓	✓				www.kpu.ca
VCM	Native Education College NEC*	Vancouver	✓	✓				✓	✓				www.necvancouver.org
VI	North Island College	Port Alberni, Courtney, Campbell River	✓	✓			✓	✓	✓		✓		www.nic.bc.ca

Tourism Region	Post-Secondary Institute	Location	Tourism, Hospitality	Business	Human Resources	Culinary Arts, Prof. Cook	Indigenous Culture & Language	Adult Basic Education ABE	Arts, Archaeology, Anthropology	Youth - Unique program	Industry Certific. / Workforce Training	Safety	Website
TO	Nicola Valley Institute of Technology NVIT*	Merritt, Burnaby	✓	✓			✓						www.nvit.ca
TO	Okanagan College	Kelowna	✓	✓	✓	✓		✓					www.okanagan.bc.ca
VI	Royal Roads University	Victoria	✓	✓									www.royalroads.ca
KR	Selkirk College	Castlegar	✓	✓		✓		✓	✓				www.selkirk.ca
VCM	Simon Fraser University	Vancouver, Burnaby	✓	✓	✓								www.sfu.ca
TO	Thompson Rivers University	Kamloops	✓	✓	✓								www.tru.ca
VCM	Trinity Western University	Langley		✓	✓								www.twu.ca
VCM	University of BC	Vancouver, Kelowna	✓	✓	✓		✓		✓				www.ubc.ca
VCM	University of Fraser Valley	Chilliwack		✓	✓		✓	✓					www.ufv.ca
NBC	University of Northern British Columbia	Prince George, Prince Rupert		✓	✓		✓						www.unbc.ca
VCM	Vancouver Community College	Vancouver	✓	✓		✓		✓					www.vcc.ca
VI	Vancouver Island University	Nanaimo	✓	✓			✓						www.viu.ca

*Institute is Indigenous Owned

9.3 Indigenous Business and Economic Development Agencies

Indigenous economic development and businesses are supported by a few Indigenous organizations. The following are the Indigenous owned and / or controlled agencies that provide funding and business supports.

- Council for the Advancement of Native Development Officers CANDO – this national organization builds capacity to strengthen Indigenous economies by providing programs and services to Economic Development Officers, including training and certification of an Indigenous economic development officers. It also partners with Industry Services Canada in the nation-wide delivery of Links-to-Learning. This conference series offers accredited professional development training tailored to each region's EDO preferences and expressed needs.
- Aboriginal Financial Officers Association of BC, and AFOA Canada – this regional chapter and national organization was first created to support Indigenous people to better manage and govern their communities and organizations through a focus on enhancing management, finance and governance practices and skills. It is the only organization in Canada that focuses on the capacity development and day-to-day needs of those Indigenous professionals who are working in all areas of management, finance, Band administration, program management, leadership, and governance along with a financial management and audit training.
- Canadian Council for Aboriginal Business (CCAB) – has a mission to promote, strengthen and enhance a prosperous Indigenous economy through fostering business relationships, opportunities, and awareness for all its members. It works with both Indigenous and mainstreams businesses and industries.
- National Aboriginal Capital Corporations Association (NACCA) and Aboriginal Financial Institutes (AFIs) – NACCA is a network of over 50 Aboriginal Financial Institutions (AFIs) across Canada dedicated to stimulating economic growth for all Indigenous people in Canada. The AFI network provides loans to businesses owned by First Nations, Métis, and Inuit people. NACCA supports the network by building AFI capacity and fostering Indigenous business development. NACCA was instrumental in securing national funds to support Indigenous businesses across Canada through this pandemic by securing funds for economic relief. The British Columbia AFI network consists of 11 agencies (Exhibit 79).

Exhibit 79: Aboriginal Financial Institutions in BC

Aboriginal Financial Institute – BC	Location
Aboriginal Business and Community Development Centre	Prince George
All Nations Trust Company (ANTCO)	Kamloops
Burns Lake Native Development Corporation (BLNDC)	Burns Lake
CFDC of Central Interior First Nations	Kamloops
Haida Gwaii Community Futures	Massett
Métis Financial Corporation of BC (MFCBC)	Surrey
Native Fishing Association (NFA)	West Vancouver
Nuu-chah-nulth Economic Development Corporation (NEDC)	Port Alberni
Stó:lō Community Futures Corporation (SCF)	Chilliwack
Tale'Awtxw Aboriginal Capital Corporation (TACC)	West Vancouver
Tribal Resources Investment Corporation (TRICORP)	Prince Rupert

Most of the national organizations conduct research including special initiatives, such as women and youth.

Métis Nation BC is in a unique position in that it offers both employment and training, along with business support and funding under one umbrella. Other Indigenous funding organizations and their sister employment agencies tend to operate under separate business entities in different locations.

In addition to the AFIs, there are also other Indigenous controlled business agencies that provide entrepreneur support including advisory services, workshops, and training. While not all provide funding, they assist entrepreneurs and businesses to connect with funders.

- Central Interior Community Futures, Kamloops
- Kootenay Aboriginal Business Development Agencies, Cranbrook
- Community Futures Development Corporation of Sto:Lo, Chilliwack

Other notable agencies in British Columbia that support businesses and entrepreneurs are the Community Futures British Columbia network (www.communityfutures.ca) and Futurpreneur (www.futurpreneur.ca). The federally funded Community Futures programs specializes in supports for economically depressed regions and communities, hit by industry collapse, economic hardship, or natural disaster. Futurpeneur focus' on supporting young entrepreneurs age 18 to 39 years of age to launch a business by offering financing and providing mentoring and expert advisors.

Others Indigenous communities and people have accessed business advisory services from agencies like CESO (Canadian Executive Services Organizations), and Business Development Bank, with financing from chartered banks and credit unions, and specialized industry funding agents, like agriculture, forestry, fisheries, arts and cultural industries.

9.4 Non-Tourism Industry Sectors

There are several industries that feed into or support the Indigenous tourism sectors – Accommodations, Attractions, Food and Beverage, Outdoor Adventure, Transportation, Festivals and Events, and Retail (including gas stations). Of these feeder industries, a few have Indigenous led and driven organizations. These British Columbia Indigenous initiatives provide programs and services designed to support Indigenous people.

Industry Sectors

- Agriculture and Agri-foods – an Indigenous strategy is under development by the First Nations Agricultural Association of BC and another by the BC Ministry of Agriculture. Adding to these are national projects to identify Indigenous nations and farmers operations, training, and support needs. The Indigenous population is the largest growing sector of the agriculture and agri-foods industry.
- BC First Nations Forestry Council – the provincial agency completed its provincial strategy which "acknowledges the cultural, ecological, economic, and social relationship between First Nations and the forests within their traditional territories." Access to and management of these lands provides BC First Nations with opportunities in forestry through timber resources, but also harvestable non-timber forest products which Indigenous people use for cultural purposes. For tourism, this translates to crafts, foods, and interpretation.

- Fisheries and Aquaculture – in coastal Indigenous communities, much of their culture and economy are linked to the waters. Many communities and people rely on fisheries for their way of life. The people's knowledge of the waters and culture have opened opportunities in guided fishing and interpretive tours – Band and individual owned, as well as employment with non-Indigenous tour operators and lodges. Also, conventional fisheries provide product for Indigenous owned restaurants and cultural foods. The emerging freshwater fisheries and aquaculture sectors are exposing opportunities and food security issues for Indigenous nations. The provincial Native Fishing Association and Aboriginal Aquaculture Association are the Indigenous organizations fulfilling these mandates.

9.5 Other Supports for Indigenous Culture and People

- First Peoples Cultural Council and First Voices – assists British Columbia First Nations with languages, arts, and cultures revitalization. In doing this, the Council provides supports, programs, and resources. First Voices is a free online resource where First Nations connect the knowledge carried in our languages to modern digital technology. It is a collaboration with Elders, providing which includes language dictionaries, alphabets, songs, stories, words, and phrases as well as audio and video to their community sites.
- First Nations Health Association – monitors the First Nation COVID-19 cases and community closures due to the pandemic. The association distributes information on COVID-19 protection, supports and advocacy.
- First Nations Education and Schools Association and Indigenous Adult and Higher Learning Association – works at the provincial level to provide services in the areas of research, communications, advocacy, program administration and networking for First Nations education. It is a First Nations-controlled organization focused on advancing quality education for all First Nations learners and supports First Nations in their efforts to improve the success of all First Nations students in British Columbia. The First Nations Schools Association, and the Indigenous Adult and Higher Learning Association operate from the same West Vancouver office and take a collaborative approach to many initiatives.
- BC Association of Friendship Centres – Friendship Centres are community hubs offering culturally safe programs and services and providing a welcoming space for all members of the Indigenous community to share knowledge and connect with others. Many Indigenous people who reside off-reserve, are not registered Indians[77] and are ineligible for programs available only to registered Indians. Non-registered persons of Indigenous ethnicity may also feel disconnected from their people and culture, however, friendship centres provide a place where they can have a sense of belonging. Friendship centres offer a variety of programs and services that respond to the needs of the areas they serve. Each of the 25 centres across British Columbia offer services and programs for youth that can include health, housing, employment, and cultural activities. Most centres offer recreation programs and healthy living services, leadership training, youth projects, ending violence support, Elder support, family support, help to apply for Indigenous internships and fellowships, and financial grants to other Indigenous serving organizations.

---

[77] A registered Indian or status Indian is the legal status of a person who is registered as an Indian under the Indian Act. Not all persons who are registered Indians are of Indigenous ethnicity as up to 1983, a non-Indigenous woman who married a registered / status Indian man was entered into the Indian registry and became eligible for benefits available to registered Indians.

Housing

- First Nations Housing and Infrastructure Council – is organizing to assume responsibility for First Nations housing and infrastructure program delivery and associated housing services in British Columbia. This improves the delivery of needed housing and infrastructure to BC First Nations with the aim to improve the lives of Indigenous people. It engages with First Nations, Tribal Councils, First Nations leaders, organizations and other special interest groups including urban and off-reserve housing providers involved in housing and infrastructure.
- Aboriginal Housing and Management Association – is an umbrella organization composed of 41 organizations of which each are Indigenous Housing providers. Its members administer more than 4,200 units of housing with 1,000+ new units in the works and delivers subsidies and oversees members' operating agreements. Many of the initiatives provide affordable or subsidized housing to off-reserve Indigenous people, and its members also build housing and renovate existing housing on and off-reserve.

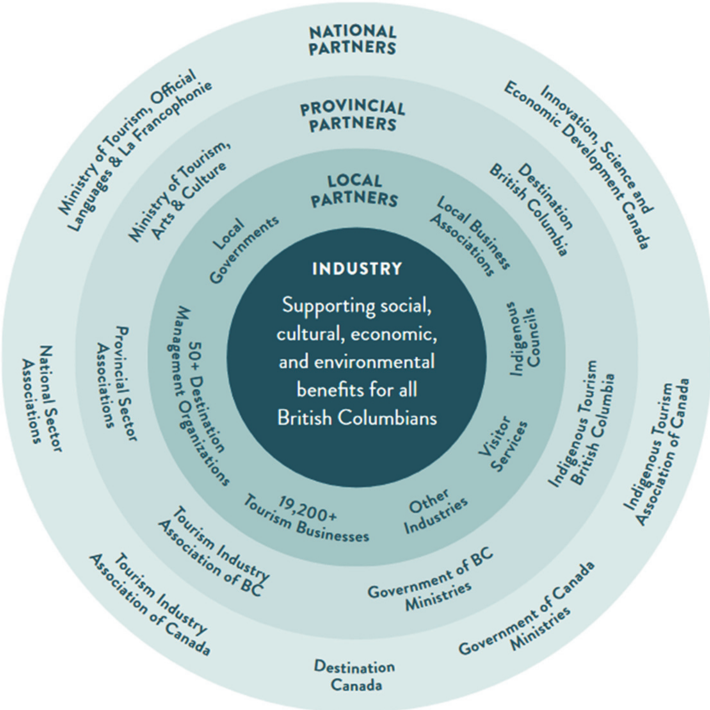
Demographic Groups

- BC Native Womens Association – advocates for a better climate for Indigenous women in British Columbia through the enhancement, promotion and fostering of the social, economic, cultural, and political well-being of Aboriginal women and girls through activism, policy analysis, and advocacy. The BCNWA's Aboriginal Skills Employment and Training Strategy (ASETS) takes a labour market driven approach, including education sponsorship. It can also aid with back to work assistance such as work clothes, shoes or travel like a monthly bus pass. The BCNWA is a member of the Native Women's Association of Canada.
- Youth – The Urban Native Youth Association, Vancouver – supports Indigenous youth (Aboriginal, Métis, Inuit, First Nations, Status, Non-Status) in the urban setting. It is a safe place for Indigenous youth offering more than 20 programs and services. Indigenous youth education and training are supported by the Cedar Walk alternative education program which is designed for Indigenous youth ages 16 to 19 whose needs are not being met in traditional school programs. The learning centre delivers free workshops on: First Aid, First Nations culture, FOODSAFE, and SuperHost, typing skills training, Serving It Right, Job search, Resume writing, Interview skills, Life skills, Computer skills, WHMIS (safety training), as well as tutoring, education funding referrals, and employment assistance. Throughout British Columbia, similar supports may be provided through friendship centres, Indigenous employment agencies, and Band organizations.

9.6 Tourism Industry Structure

Similar to other destinations, the tourism industry in British Columbia includes many different organizations like tourism businesses, suppliers, product sectors, communities, associations, regional destination marketing organizations, Indigenous communities and federal, provincial, and municipal governments. ITBC works with many of these industry partners to deliver tourism marketing and development programs.

Exhibit 80: British Columbia's Tourism Industry Structure[78]



9.7 Political Climate

Since 1997, the Indigenous Tourism Association of BC formed alliances with agencies that have mutual interests. It first signed an MOU with Tourism British Columbia in 1997 and continued this alliance with the province through the BC Ministry of Tourism and now Destination BC. The organizations mandate is further solidified through an agreement with the First Nations Leadership Council (FNLC), which is comprised of the political executives of the BC Assembly of First Nations, First Nations Summit, and the Union of BC Indian Chiefs. The FNLC works together to coordinate approaches to issues relevant to First Nations communities throughout the province. The group jointly develops approaches and policies on matters of importance to BC Indigenous nations and their people, like the BC COVID-19 Emergency Resource Site (www.fnlcemergency.ca).

[78] Source: Destination British Columbia. 2020.

10 SUMMARY OF FINDINGS

This research report identifies the context, challenges, and opportunities for enhancing Indigenous employment in British Columbia's growing Indigenous tourism sector. The findings produced offer much of the evidence-based foundation needed to inform and guide the eventual development of a province-wide Indigenous tourism labour market strategy.

Faced with unanticipated disruptions created by the COVID-19 pandemic arrival, the report's data collection methods were adjusted and modified (on-the-go) to ensure that the responses of an appropriate number and cross-section of stakeholders and information sources were explored. This involved using a complementary mix of on-line data searches and reviews of relevant secondary quantitative and qualitative labour market studies, two on-line employer surveys with Indigenous and other interested tourism business operators, multiple on-line and / or personal interviews with a cross-section of Indigenous tourism trainers, educators, and students, as well as four webinar-based provincial forums with leaders in Indigenous tourism. Overall, the perspectives of stakeholders through 697 touchpoints were solicited, gathered, and analyzed via these methods. While each approach offered their own mix of qualitative and quantitative insights, collectively they provided a triangulated and consensus-based understanding of current and future needs for labour in Indigenous tourism. While variations in responses occurred across job sectors and regions, some dominant and overriding trends in perspectives emerged.

Indigenous tourism in British Columbia is a growing and critically important part of the province's economic and cultural fabric. Not only has it grown substantially in terms of Indigenous businesses and jobs since the late 1990s, but it has also become an integral component of British Columbia's tourism positioning on the world's stage.

Despite the disruptive effects on business operations since COVID-19s arrival in 2020, confidence prevails that the industry will gradually bounce back to record setting 2019 employment levels, many stakeholders feel it will rebound relatively fast and continue with strong growth. Even with this optimism, experts recommend caution. Indigenous cultural tourism is a unique experience that appeals to educated and international visitors, rather than local markets. Hence, Indigenous tourism recovery is dependent on the reopening of the skies and borders to enable the return of international travellers. Although, resort destinations such as the Okanagan, Whistler, and the Tofino-Ucluelet are expected to recover much faster as they are in areas of high demand by domestic travellers, Indigenous tourism operators in these areas have an opportunity to accelerate recovery by pivoting to optimize their experiences to appeal to domestic travellers.

Anticipated growth and pre-2020 experience suggest that hiring personnel to deliver Indigenous tourism products and experiences will continue to be a barrier to achieving tourism's full potential. While there is a rapidly growing Indigenous demographic population that could potentially be available to meet the employment gap, there is need to ensure candidates are aware of tourism industry opportunities, and to optimize Indigenous tourism competitiveness due to intra and inter industry competition.

There are well documented barriers to employment for Indigenous people, some are similar to other employment seekers, though many are unique to Indigenous people. Overcoming these barriers will enable higher employment in the tourism sector in British Columbia and attract more Indigenous people to the industry.

10.1 Indigenous Communities and Population

Throughout British Columbia there are 203 First Nations, over 30 language families which include more than 90 dialects. Most of the communities are in rural settings and lack housing for their community members. While 97% of British Columbia First Nations have access to internet connectivity, the community may not be connected, the internet speed may be low, and the community and households may not be connected or able to afford the internet.

The Indigenous population in British Columbia is roughly 6% of the provincial population, and is young, has a high birth rate, experiences high levels of unemployment, low average income, and varying degrees of levels of education. In addition, the largest Indigenous population in British Columbia is in the Vancouver area where 67% of all British Columbia tourism related jobs are located.

There are a number of entrance points and paths to Indigenous participation in tourism.

- Employment – Indigenous people would enter the industry employees, such as their first job, or semi- or skilled worked with educational or technical requirements, or with cultural skills and local knowledge. Many tourism managers were trained on-the-job and promoted within the ranks to achieve management status.
- Self-employment – as an entrepreneur at various life stages.
- Other labour – as a seller of goods and services to tourism, such as gifts, arts, food products, and services such as teachers, story tellers, performers.

10.2 Attracting Indigenous Personnel

Although there is a demand for labour in tourism, Indigenous people are 'eyed' as the solution to labour shortages by other industries. These competitive industries can pay high wages with little requirements for education or work experience, thus requiring the tourism industry to be innovative in its outreach and promotion to Indigenous people to attract them to be part of the industry and must 'sell' themselves as the employer of choice to Indigenous people. An added challenge is the perception of unsafe working conditions due to the COVID-19 pandemic. The entire tourism industry must work together to innovate and develop creative solutions to outcompete other employment sectors given the reputation of uncompetitive wages and seasonal work.

Availability of Jobs

The Indigenous workforce has the perception there is a 'job shortage which is contradictory to the current and future labour shortages in the tourism industry (as well as other industries). Even after the COVID-19 pandemic has ended, the tourism labour shortage is expected to continue as people who were in the industry choose not the return and businesses start to recover. Subsequently, there is a need to ensure Indigenous people are aware of tourism employment and career opportunities. There is an opportunity to share information about the demand for tourism jobs in known by Indigenous communities, the workforce and post-secondary training institutions.

Workforce Interest

Indigenous people indicated that while wages were important in a job, there are other qualities they seek in an employer – such as receiving a living wage, opportunities for advancement, being treated respectfully and fairly in the workplace, engaging in cultural activities and opportunities, being valued for their culture and knowledge and having that recognized equally to other standard job requirements (i.e., education and work experience). Employers can entice Indigenous people through developing a positive reputation that is built upon demonstrating their values to Indigenous people and providing opportunities for promotion and skills development.

Other workplace benefits that Indigenous people request are community or employer supplied childcare, funding for education and training, teaching of culture and language for all its people in events like social and team building activities, and incentives to increase performance, attendance, and work quality. Also, people want to be able to participate in community cultural and ceremonial events.

Embedding Indigenous Culture

There is significant awareness that incorporating Indigenous cultural dimensions into the delivery of tourism products and experiences creates a competitive edge to tourism businesses. Hiring confident Indigenous personnel with a strong understanding of their Indigenous cultures and an understanding of how to appropriately communicate it to others benefits the business, customer, employee and broader Indigenous community and tourism region.

Employer Requirements

Depending on the employer, the business will need varying level of skilled workers who have a combination of educational and workplace experience. For Indigenous cultural tourism experience, cultural knowledge and skills have greater importance. Pre-employment criteria should not prevent hiring of persons who otherwise have the personality and traits for the position yet lack the 'educational' or work experience requirements. The Indigenous and Métis communities, particularly the employment services, are positioned to support Indigenous people with acquiring work credentials such as certification and educational.

Indigenous employment and training agencies ISETs) offer industry and institute developed programs, such as FirstHost, Food Safe, Commercial Transportation Licensing, Guiding, and support Indigenous people in their educational pursuit of professional skills training programs (e.g., professional cook, accounting, technology applications, etc.). They can also work with educational institutes and training agencies to tailor, design and package training and educational programs, workshops, and courses.

Recruitment Improvements

Recruiting strategies for attracting talented employees require improvements. For the most part, recruitment approaches focus on locally based and more immediate relationship-based strategies. Greater emphasis for recruitment programs should be placed on building partnerships with the Indigenous community and their network, such as ISETs and Friendship Centres, or more targeted groups like Youth Centres, and Women's groups.

Indigenous communities and agencies have strong connections with community members and other Indigenous people and can offer pre-employment training and assist individuals and groups with gaining certification and workplace required gear and equipment. They may also offer on-the-job supports, such as Job Coaches, who help Indigenous people with settling into the employment and act as a liaison between the employee and employer. ISETs also have services that assist employers with recruitment, and provide wage subsidies, including youth summer program funds.

Formal learning institutions can also provide a combination of interval workplace training, in-class exposure to industry mentors and workplace case studies, and on-going posting of industry positions and potential applicants, especially for positions such as Chef / Professional Cook, Human Resources Management, business operations, management, accounting, administration and apprenticeable trades.

Hiring and Application Process

Another area to improve is the hiring and application process. This process must become more flexible and welcoming. Unless the job requires strong written and grammatical skills, modify the application process to reflect the activities of the job, versus assessing whether the individual can complete a written application. For example, if the position is for an outdoor cultural interpreter, conduct the interview in the outdoors and have a conversation with the person about an Indigenous cultural lesson or teaching or experience in the outdoors, have the candidate tell a story.

Employee Retention

More effective strategies for retaining talented employees are needed to retain employees, such as:

- Providing engaging work environments that are competitive with other tourism business and industry sectors is increasingly essential.
- Addressing barriers of wage, transportation and housing access are significant challenges.
- Focusing on options that encourage partnerships and programs.
- Providing on-going career and skill development during employment.
- Creating a work environment that is comfortable with flexible work schedules so employees can maintain cultural and community activities.
- Providing on-site role mentoring.

Though at the forefront of the reasons people chose an employer, stayed, or left was the way the employee felt they were treated by management and their co-workers. In the workplace, Indigenous people want a workplace of mutual respect between management and staff (versus hierarchical or positional respect), with the opportunity to grow, share and succeed.

Collectively these and other findings in this report provide the foundation for the development of a system-wide and forward-looking Indigenous labour force strategy. One that provides an evidence-based platform for Indigenous employers, trainers, and operators for the next decade. While the advent and ongoing impacts of COVID-19 has created a significant pause in Indigenous tourism's immediate advancement, it ironically also provides an opportunity to reset and enhance its human resource capacities in ways that will make Indigenous tourism more resilient and competitive in the future.

10.3 Moving Forward

Challenges in the workplace include matters around racism, discrimination, bullying and social exclusion, recruitment difficulties, skills, education, technical requirements, job-related skills, professional qualifications, work experience, cultural differences including values, self-esteem, poverty and poor housing, lack of driver's licence, lack of transportation, availability of childcare, living in rural / remote areas, and business labour policy. Based on national studies, there is also the perception by Aboriginal that there is a shortage of jobs.

There are a multitude of approaches to mitigate labour shortages in tourism in Indigenous tourism and to provide supports to Indigenous peoples to inspire them to work and establish careers in the industry.

Need for Organizational Long-term Vision and Human Resources Planning

- Recognition that the path to Indigenous tourism development differs for tourism businesses and Indigenous communities / First Nation Bands. Bands need to work on long term HR strategies and planning. Policies need to be developed with vision and longevity in mind, including planning for long-term tourism career paths for Indigenous people.
- Further, First Nation Bands and tourism businesses need to develop strategies to hire into undesirable positions to fill all labour capacity. For these positions and after the local labour market has been exhausted, there is an opportunity to review the possibility of using foreign labour.
- Partnerships with Indigenous employment and training agencies (ISETs), education providers, industry sectors, and housing are required to combat employment barriers. Partnership could address actions that identify training needs, coordinate certificate programs (i.e., FOODSAFE, FirstHost / SuperHost, WHMIS, drivers licence, First Aid, etc.) that are of mutual interest to self-employed people and other industry employers, and advocate for the infrastructure (i.e., housing, childcare, internet) needed to support Indigenous people to build their skills, secure employment, move to where the jobs are, and ultimately, to enjoy a better quality of life.

Training and Capacity Development

- Indigenous youth training programs would benefit from instilling additional self-confidence and pride in culture through integrating culture and community and customizing the program for the Indigenous learner.
- There is a need to ensure enhancements are made in cultural and language training for Indigenous people, and that there is a place for Elders and Indigenous knowledge keepers to help with training in the workplace.
- Indigenous people should be the teller of their stories. There are opportunities to develop training to enhance cultural interpretation, such as how to develop the story, and storytelling skills.
- Training programs, courses, and workshops must be more culturally oriented and flexible in their delivery considering timing and delivery modes, where in-person training will occur, if virtual whether high speed internet is available, and whether meals will be provided.
- On-the-job training, mentoring, management, business, accounting, and tourism skills training are recommended by Indigenous and non-Indigenous tourism businesses as the most useful for developing tourism employees.
- There is need for investment in helping people understand a clear path for a long-term career for people interested in Indigenous tourism. There continues to be a lack of awareness of highly skilled jobs beyond entry-level positions, and the path to attain supervisory and management positions.

- A great number of tourism jobs require a driver's licence. ISETs must continue to provide training for Indigenous people to obtain drivers licences and provide support to remove barriers that prevent acquiring their licence.

Recruitment and Retention

- Indigenous tourism business leaders can provide a working environment that is desirable for Indigenous people by creating exceptional workplaces. This includes proudly sharing Indigenous culture, empowering Indigenous labour by raising their self-esteem by offering safe work environments, providing meaningful mentorship programs, ensuring they are paying living wages. Creating opportunities for Indigenous people to share and celebrate their culture through workplace team building activities and recognize that when teaching their cultural knowledge, they are experts and are recognized with pay as other experts are (i.e., not expected to volunteer their cultural knowledge or Indigenous presence).
- Employment benefits should enable Indigenous people to participate in traditional cultural and ceremonial activities and incentivize the employees to contribute and strengthen their skills and knowledge for the workplace.
- Employers should recognize significant days during the year that honor Indigenous people, such as National Indigenous Day (June 21) and Orange Shirt Day[79] (September 30).
- Indigenous and non-Indigenous tourism businesses see that raising the awareness of tourism careers is important in elementary and secondary school programs.
- Indigenous tourism businesses have recommended that a unique website for Indigenous tourism jobs would be helpful in their recruitment challenges.

Community and Infrastructure

Indigenous communities are primarily located in rural areas where community and institutional infrastructure may be undeveloped, requiring repairs and supports, or insufficient.

Internet Connectivity

COVID-19 underscored the importance of internet connectivity for Indigenous people, governments, and businesses.

- There is an ongoing need to ensure there is online connectivity within rural communities with affordable availability to families in their homes.
- There is need to ensure access to computers in Indigenous communities and homes. This will enable Indigenous people to easily participate in online training, learn job-readiness skills, apply for jobs, participate in webinars, and share and build their cultural knowledge and language.
- Accessible and affordable internet is needed for Indigenous tourism businesses to be able to online market their businesses, take reservations, connect with emergency services, sell gifts online, and provide internet services to their customers who want to stay connected, whether it is in a hotel or campsite.

---

[79] Orange Shirt Day creates awareness of the individual, family and community inter-generational impacts of Indian Residential Schools. Orange Shirt Day activities promote that "Every Child Matters", in recognition of the Indigenous children who went to Indian Residential Schools.

Education – Institutions and Accessibility

Providing the means for Indigenous people to access training whether it is certification or formal education in a manner that is comfortable and easily accessible can increase Indigenous people ability to enter and succeed in the industry.

- Build linkages to Indigenous cultural and languages agencies in Indigenous communities and provincial, i.e., the First Peoples Cultural Council, and First Voices, and establish partnerships with these key agencies.
- Partner with Indigenous educational institutes to develop and deliver post-secondary training for Indigenous cultural training, and ensure program design incorporates elements that are proven to help Indigenous people succeed in the classroom.
- Support post-secondary institutions with their ability to deliver in-person training in rural communities (e.g., Thompson Rivers University closing campuses in Clearwater and Barriere). Partner with local institutes to offer training to the communities at local campuses and through roving classrooms, like the NVIT-Industry Training Authority trades training trailers.
- Collaborate with post-secondary institutes on working with Indigenous communities and modify their program delivery to promote Indigenous student success.

Transportation

- Encourage public or employer provided transportation in rural communities, along with operating hours that align with work hours (i.e., early and late hours).
- Support drivers licence training in Indigenous communities through Indigenous agencies, and advocate for the removal of barriers that thwart Indigenous people from regaining their licence.

Housing

- Identify practices that communities and employers use to support housing development and attract Indigenous people to an area for work.
- Encourage housing construction housing so Indigenous people can return to their home community.
- Connect with the Indigenous housing agencies – Aboriginal Housing Management Association, the First Nations Housing and Infrastructure Council, and BC Housing to provide information on the housing needs for Indigenous people working in tourism.

10.3.1 Tourism Industry and Institution

Recovery and return to growth, demands additional actions that support Indigenous tourism. Indigenous Tourism BC is a leading force in Indigenous tourism in Canada and influential in the British Columbia tourism industry. Led by ITBC, there needs to be a group or organization that is adequately funded who will work to develop the Indigenous tourism labour force.

Partnerships

- There are opportunities to work with other Indigenous tourism businesses, and non-Indigenous businesses and agencies like go2HR and ISETs to reduce recruitment and retention challenges.
- Explore joint training and program promotional opportunities with go2HR to deliver training to Indigenous tourism employers.

- Work with ISETS on planning employee certification training and provide information on tourism and career paths.
- Assist and encourage Indigenous tourism businesses facing labour market challenges to work with and build relationships with tourism training programs and local students seeking employment.
- Connect with mainstream and Indigenous industry sectors to jointly devise plans for training, workshops, and seminars, and develop communications materials to inform Indigenous people of these opportunities.
- Work closer with regional tourism organizations to jointly promote tourism careers and opportunities.

Data / Insight Gaps

This research identified knowledge gaps in relation to the Indigenous tourism labour market on the following:

- Requires on-going knowledge on the impact of COVID-19 on Indigenous communities, tourism businesses and the workforce.
- Better understand the interest of First Nations to develop tourism and their relationship with educational institutes, public schools, and post-secondary, in promoting Indigenous culture and languages, and tourism and certification attainment.
- Ensure there is information available that evaluates current Indigenous employment programs and determine the status of current programs and demand for new programs.
- Investigate if data exists about participation rates and outcomes of Indigenous students who participate in post-secondary tourism programs in British Columbia.
- Align the training needs of Indigenous tourism businesses and Indigenous cultural tourism businesses with post-secondary education programs.
- Profile the difference between the needs of Indigenous cultural tourism businesses and the general tourism labour force.
- Capitalize on the opportunity to learn about Indigenous recruitment and retention strategies used by other economic sectors (e.g., mining, agriculture, trades, health care).
- Continue working relationships between ITBC with Destinations BC, Destination Canada, and ITAC to improve research and outcomes of consumer demand for Indigenous cultural experiences, including profiling detailed characteristics of visitors that enjoy Indigenous tourism experiences.
- Develop working relationships with go2HR, WorkSafeBC, and the First Nations Safety Council to better understand the Occupational Health and Safety status of Indigenous tourism businesses in British Columbia. These relationships will help address labour shortages and safety concerns of Indigenous tourism businesses.

This research had identified 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.
- 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 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. Another source is the Aboriginal Peoples Survey which gathers data of on-reserve Aboriginal people, conditions, activities and languages, and the participation of the Bands is voluntary.

- Moving forward, there are several opportunities to improve research related to the Indigenous tourism labour market. Tourism HR Canada and go2HR have identified the need to better measure the labour market in Canada and British Columbia. There is the prospect to engage with Tourism HR Canada (via go2HR) to ensure that Indigenous tourism labour force needs are incorporated into their work to better measure the labour force in British Columbia. Also, there is the opportunity to explore better measurement of the current and future labour supply (those currently in the workforce) rather than just in demand, and of Indigenous people who are not participating in the labour force.

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 term, 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 British Columbia-made modern-day treaty making process (www.bctreaty.ca). To date, there are eight constitutionally entrenched modern treaties in the province which includes the Nisga'a[80] treaty. First Nations still recognize their entire traditional territory, and their inherent

[80] Nisga'a initiated treaty negotiations in the early 70s under the former treaty negotiation process.

Aboriginal Rights and Title (AR&T) to govern all their traditional lands is more frequently being determined and recognized in the courts.

- 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.

LIST OF EXHIBITS

APPENDIX A: LIST OF PROVINCIAL ZOOM SESSION PANELISTS

Frank Antoine, Moccasin Trails

Brenda Baptiste, Indigenous Tourism BC

Krista Bax, go2HR

Jared Beaton, Tin Wis Best Western Resort

Jenna Bower, Nkmip Desert Cultural Centre

Janelle Brewer, Okanagan Indian Band

Paulette Flamond, Boreal Gardens

Chef Andrew George, NVIT Chef program

Sazid Hasan, BC Labour Market Information Office, Labour Market Insights, Evaluation, and Outreach Branch

Elijah Mack-Sterling, Kekuli Café Merritt

Heather Paul, Squamish Lil'wat Cultural Centre

Richard Porges, Destination BC

Arun Subramanian, go2HR

Kory Wilson, BCIT

Barry Zwueste, St. Eugene Mission Resort

APPENDIX B: INDIGENOUS TOURISM IN BC BY TOURISM REGIONS

This section includes a profile of the Indigenous tourism industry by tourism region. It summarizes the number and type of Indigenous tourism businesses for each region. The data is extracted from the provincial Indigenous tourism business list maintained by ITBC since 1997 and updated for this project (see Section 4.1). This list was also used to calculate industry sectors and changes within those regions. In addition, 2019 regional Indigenous tourism employment estimates by occupation are summarized here from research conducted by the consulting team in 2020 (see Section 8.3). Finally, the 2020 Indigenous tourism business survey results (see Section 4.3) were composed by region to produce the business profile, employee profile and skills and recruitment characteristics. Though it was necessary to combine business survey results for several regions due to small sample sizes – e.g., Northern BC with the Cariboo Chilcotin Coast, and Kootenay Rockies with the Thompson Okanagan region.

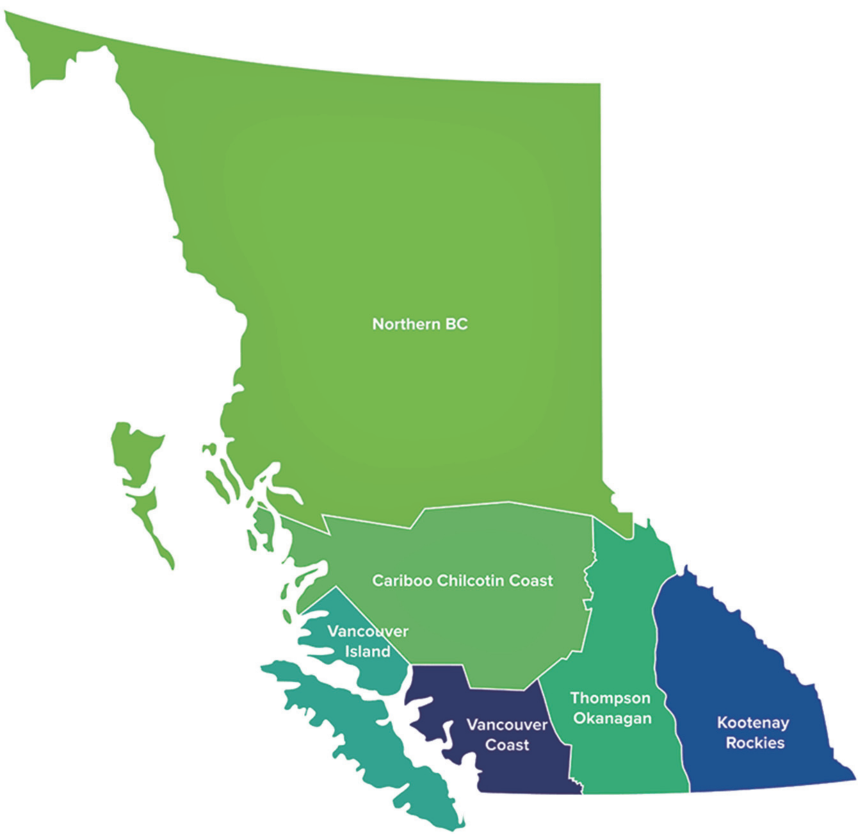


Exhibit 81: BC Regional Tourism Map

Northern BC

Exhibit 82: Northern BC – Indigenous Tourism Operators by Sector 2020

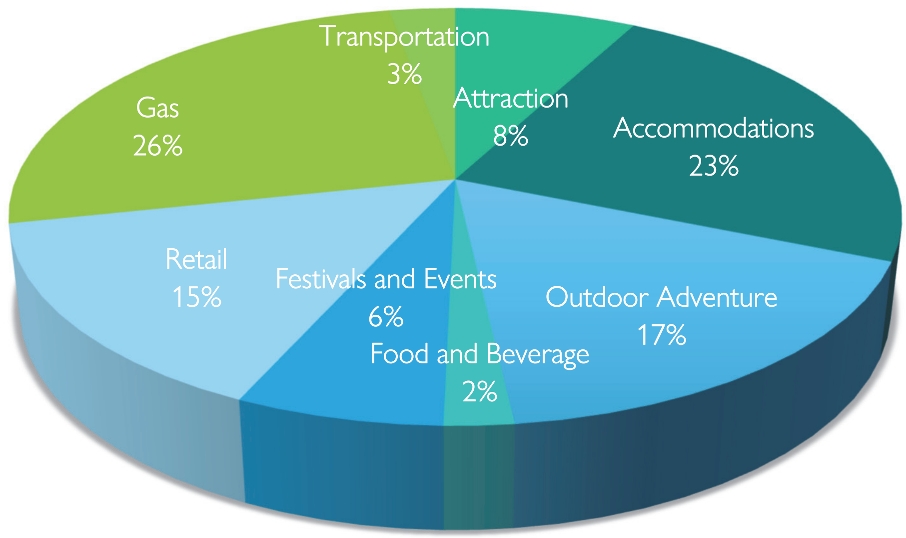


Exhibit 83: Northern BC – Indigenous Tourism Operators by Sector 2003 to 2020

Primary Tourism Sector	# 2020	% 2020	# 2017	% 2017	# 2003	% 2003	% Change since 2017	% Change since 2003
Attraction	11	8%	11	10%	5	16%	0%	120%
Accommodations	33	23%	13	12%	2	6%	154%	1550%
Outdoor Adventure	24	17%	18	17%	7	23%	33%	243%
Food and Beverage	3	2%	1	1%	0	0%	200%	100%
Festivals and Events	9	6%	8	8%	6	19%	13%	50%
Retail	21	15%	21	20%	10	32%	0%	110%
Gas	36	26%	31	30%	1	3%	16%	3500%
Transportation	4	3%	2	2%	0	0%	100%	100%
Total	141	100%	105	100%	31	100%	34%	355%

Exhibit 84: Northern BC – Change in Businesses Since 2017

	2020
Previous # of businesses operating	105
LESS: No longer operating	3
= Continued operating	102
ADD: New Indigenous businesses	39
= Current Indigenous businesses operating	141
NET Change # Businesses (Gain/-Loss) since 2017	36
% Change over previous period	34%

Exhibit 85: Northern BC – Percentage Ownership by Type

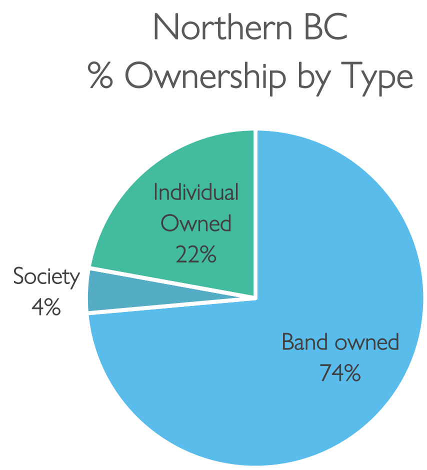


Exhibit 86: Northern BC – Employment by National Occupation Code (NOC)

Northern BC	Employed	% of Regional Total	% of Occupation Total FT	% FT	PT	% PT
Accommodation Service Managers	25	4%	25	100%	0	0%
Administrative Assistant	10	2%	10	100%	0	0%
Administrative Officers	3	0%	3	100%	0	0%
Artisans and Craftspersons	10	2%	0	0%	10	100%
Bartenders	5	1%	3	50%	3	50%
Bus Drivers, Subway Operators and Other Transit Operators	20	3%	18	88%	3	13%
Chefs	10	2%	10	100%	0	0%
Cooks	13	2%	8	60%	5	40%
Dancers	13	2%	0	0%	13	100%
Employment Coordinator	3	0%	0	0%	3	100%
Food and Beverage Servers	71	11%	40	57%	30	43%
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	20	3%	20	100%	0	0%
Hotel Front Desk Clerks	18	3%	15	86%	3	14%
Janitors, Caretakers and Building Superintendents	43	7%	13	29%	30	71%
Landscaping and Grounds Maintenance Labourers	3	0%	0	0%	3	100%
Lawyers and Quebec Notaries	3	0%	0	0%	3	100%
Library, Archive, Museum and Art Gallery Managers	5	1%	5	100%	0	0%
Light Duty Cleaners	28	4%	15	55%	13	45%
Other Customer and Information Services Representatives	3	0%	3	100%	0	0%
Outdoor Sport and Recreational Guides	38	6%	25	67%	13	33%
Restaurant and Food Service Managers	28	4%	28	100%	0	0%
Retail and Wholesale Trade Managers	51	8%	51	100%	0	0%
Retail Salesperson	43	7%	23	53%	20	47%
Service Station Attendants	66	10%	51	77%	15	23%
Social Workers	5	1%	3	50%	3	50%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	30	5%	25	83%	5	17%
Technical Occupations Related to Museums and Art Galleries	68	11%	5	7%	63	93%
Tour and Travel Guides	18	3%	10	57%	8	43%
All Occupations in NBC	650	100%	407	63%	243	37%

Cariboo Chilcotin Coast

Exhibit 87: Cariboo Chilcotin Coast – Indigenous Tourism Operators by Sector 2020

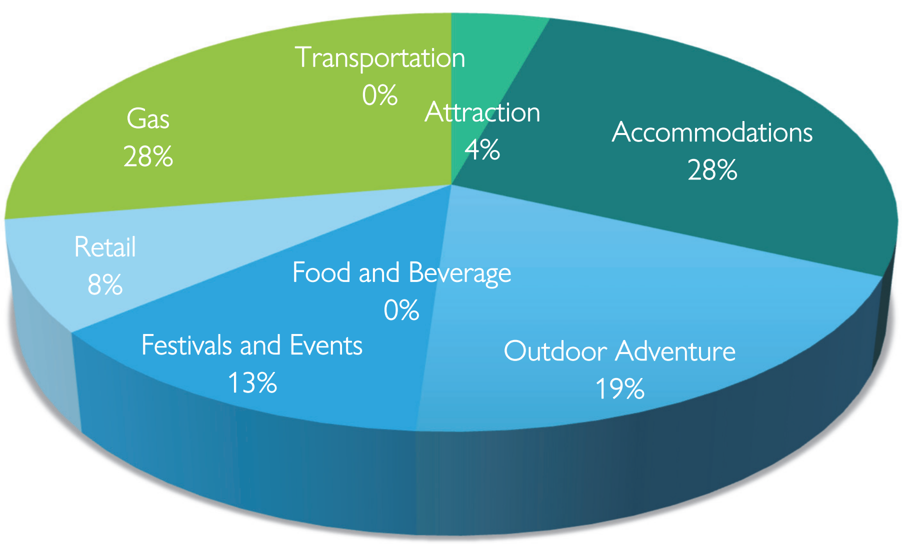


Exhibit 88: Cariboo Chilcotin Coast – Indigenous Tourism Operators by Sector 2003 to 2020

Primary Tourism Sector	# 2020	% 2020	# 2017	% 2017	# 2003	% 2003	% Change since 2017	% Change since 2003
Attraction	2	4%	4	10%	2	14%	100%	0%
Accommodations	13	28%	9	23%	7	50%	44%	86%
Outdoor Adventure	9	19%	9	23%	3	21%	0%	200%
Food and Beverage	0	0%	0	0%	0	0%	100%	0%
Festivals and Events	6	13%	1	3%	1	7%	500%	500%
Retail	4	9%	17	43%	1	7%	-76%	300%
Gas	13	28%	0	0%	0	0%	1000%	100%
Transportation	0	0%	0	0%	0	0%	100%	0%
Total	47	100%	40	100%	14	100%	18%	236%

Exhibit 89: Cariboo Chilcotin Coast – Change in Businesses Since 2017

	2020
Previous # of businesses operating	40
LESS: No longer operating	0
= Continued operating	40
ADD: New Indigenous businesses	7
= Current Indigenous businesses operating	47
NET Change # Businesses (Gain/-Loss) since 2017	7
% Change over previous period	18%

Exhibit 90: Cariboo Chilcotin Coast – Percentage Ownership by Type

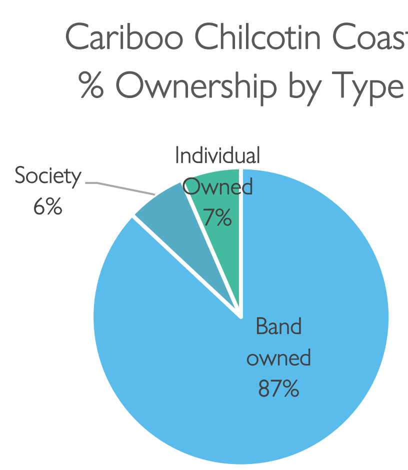


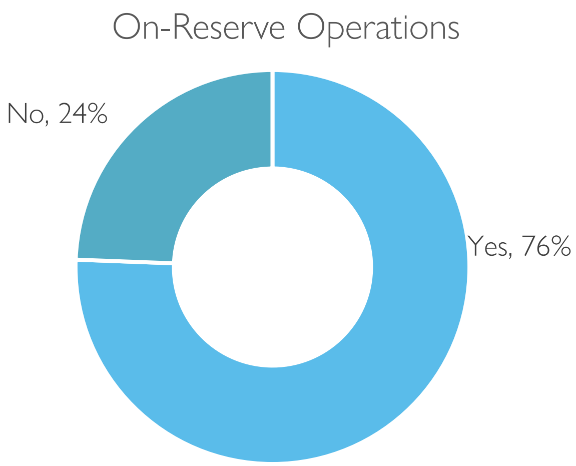
Exhibit 91: Cariboo Chilcotin Coast – Employment by National Occupation Code (NOC)

Cariboo Chilcotin Coast	Employed	% of Regional Total	% of Occupation Total			
			FT	% FT	PT	% PT
Outdoor Sport and Recreational Guides	124	25%	94	76%	30	24%
Tour and Travel Guides	104	21%	81	78%	23	22%
Service Station Attendants	40	8%	30	75%	10	25%
Light Duty Cleaners	33	7%	33	100%	0	0%
Retail and Wholesale Trade Managers	33	7%	33	100%	0	0%
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	28	6%	28	100%	0	0%
Retail Salesperson	23	5%	5	22%	18	78%
Accommodation Service Managers	20	4%	18	88%	3	13%
Cashiers	20	4%	10	50%	10	50%
Bus Drivers, Subway Operators and Other Transit Operators	18	4%	0	0%	18	100%
Janitors, Caretakers and Building Superintendents	10	2%	8	75%	3	25%
Administrative Assistant	5	1%	5	100%	0	0%
Chefs	5	1%	5	100%	0	0%
Cooks	5	1%	5	100%	0	0%
Executive Housekeepers	5	1%	5	100%	0	0%
Landscaping and Grounds Maintenance Labourers	5	1%	5	100%	0	0%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	5	1%	0	0%	5	100%
Accommodation, Travel, Tourism and Related Services Supervisors	3	1%	3	100%	0	0%
Financial Managers	3	1%	3	100%	0	0%
Hotel Front Desk Clerks	3	1%	3	100%	0	0%
Library, Archive, Museum and Art Gallery Managers	3	1%	0	0%	3	100%
All Occupations in CCC	493	100%	372	75%	121	25%

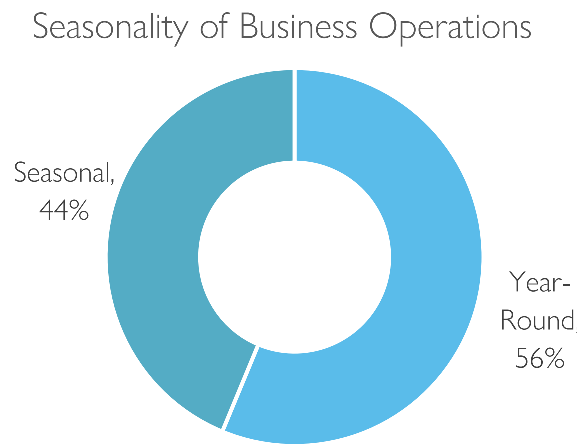
Northern BC and Cariboo Chilcotin Coast – Indigenous Tourism Business Survey Results

Business Profile

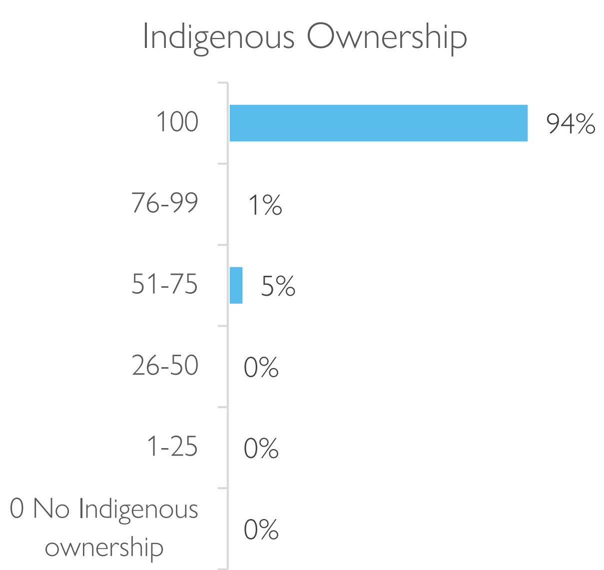
Exhibit 92: Northern BC and Cariboo Chilcotin Coast – Indigenous Tourism Business Profile



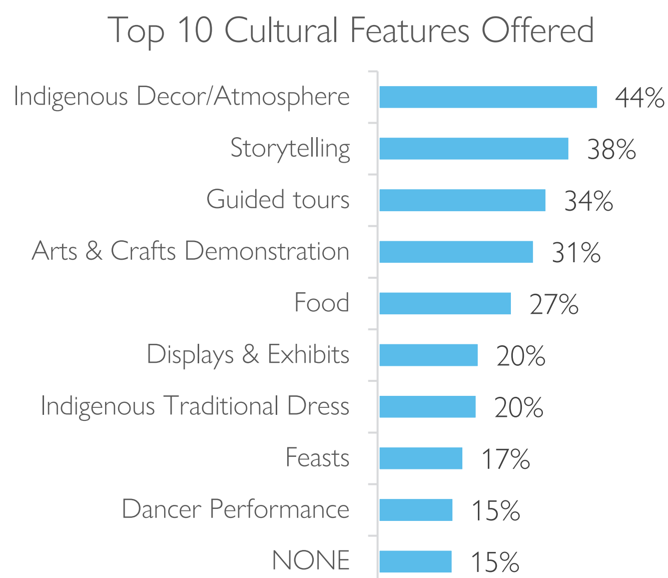
Does your business primarily operate on-reserve? n=58



What months of the year does your business primarily operator? n=57



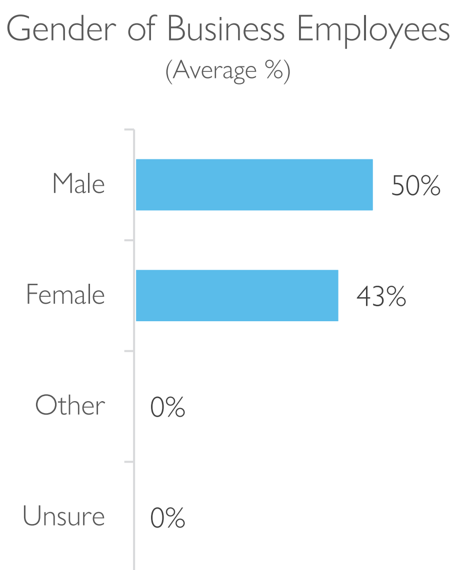
What percentage (%) of this tourism business is Indigenous owned? n=59



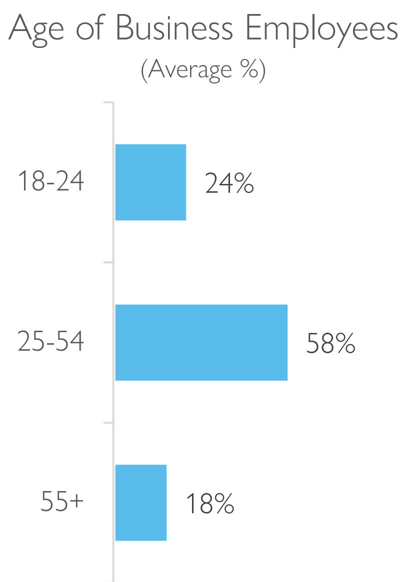
What Indigenous cultural features/activities characterize your tourism business? n=65. 65 businesses selected 243 cultural features.
Note: Businesses could select multiple months of operation therefore it is expected that percentages do not total 100%.

Employee Profile

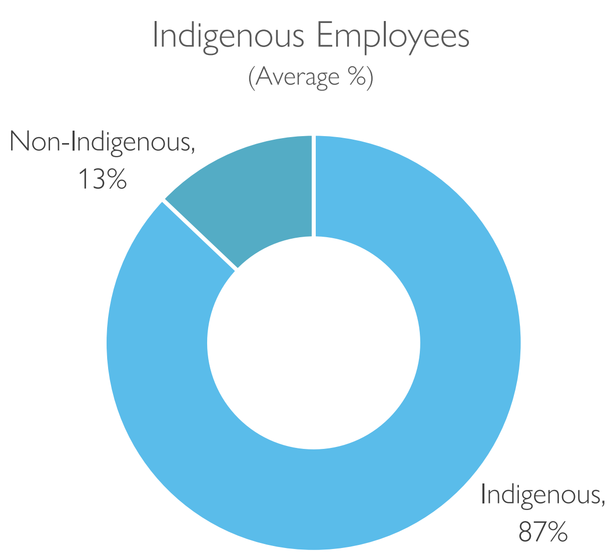
Exhibit 93: Northern BC and Cariboo Chilcotin Coast – Indigenous Tourism Business Employee Profile



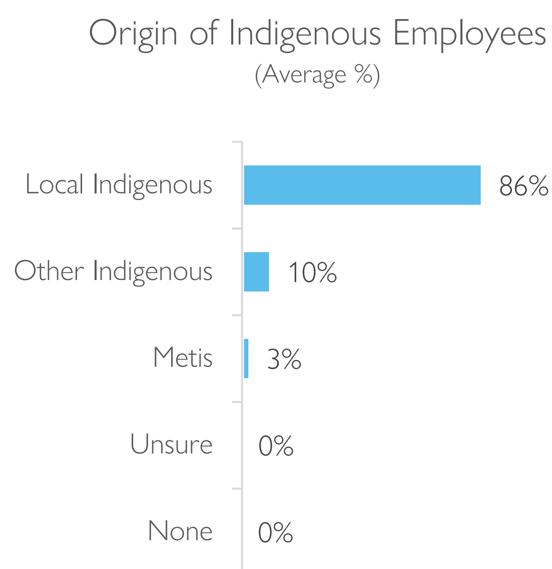
How many employees are typically male, female, other, unsure? n=32



Overall, how many employees fall in the each of the following age categories? n=32



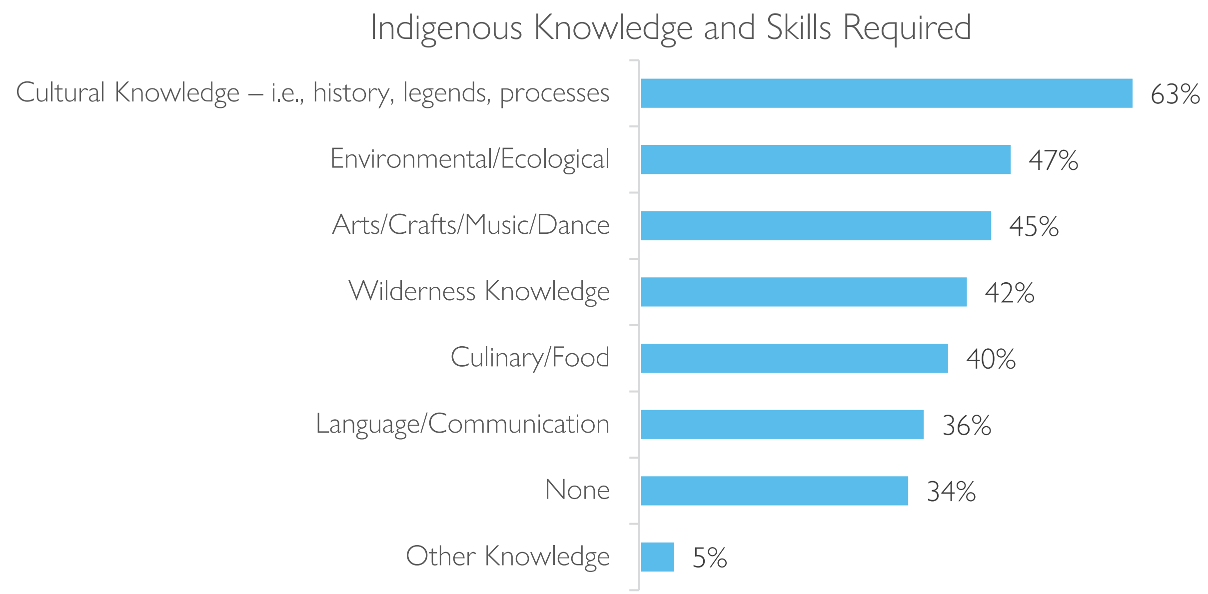
Overall, about how many or what percent of these employees were: n=54



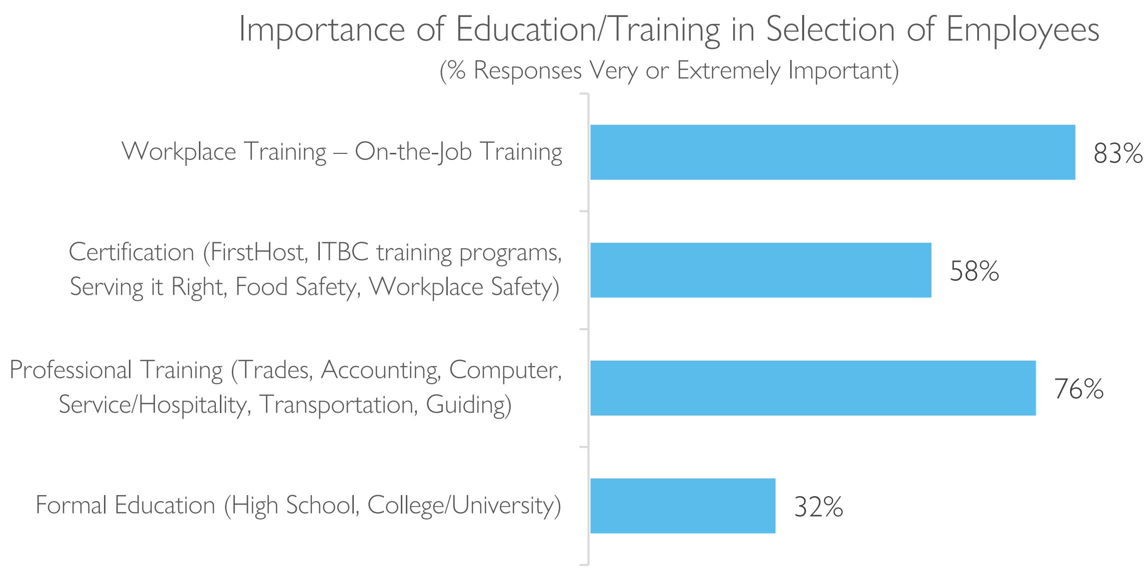
Overall, about how many or what % of the Indigenous personnel were? n=54

Skills and Recruitment

Exhibit 94: Northern BC and Cariboo Chilcotin Coast – Indigenous Tourism Business Skills and Recruitment Profile



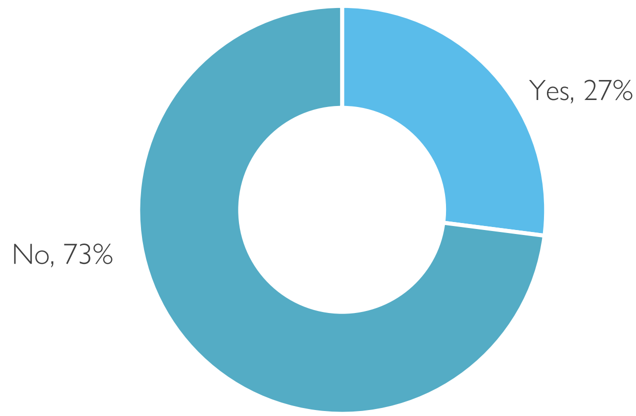
Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.
54 business responded with 168 responses.



How important were the presence of the following formal education/training qualifications in your typical selection of employees? n=34.

Recruitment Challenges

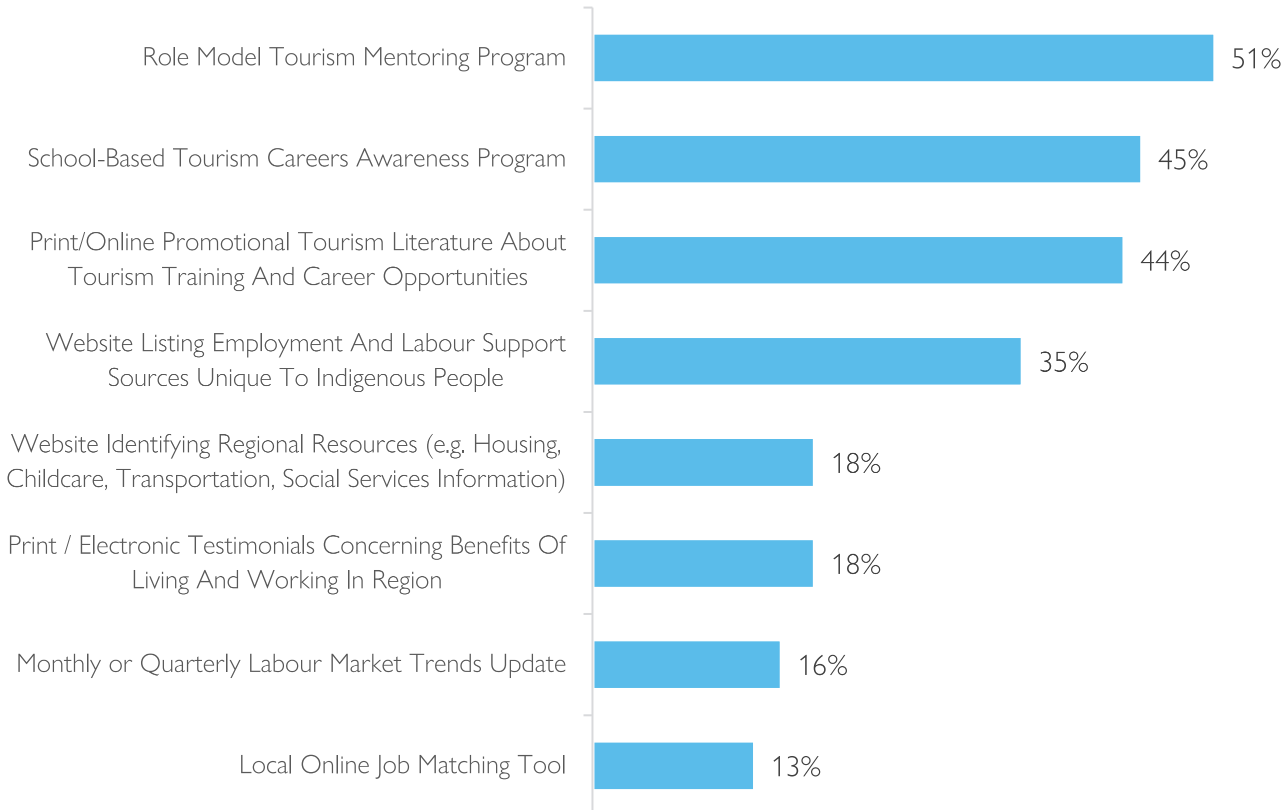
(% of Businesses)



Overall, did your tourism business have any challenges recruiting its required

Future Recruitment Tools to Attract Indigenous Employees

(% of Businesses Responding 'A Lot')



Over the next 5 years (2020/24, to what extend would the availability
of the following recruitment tools help your company attract Indigenous employees?
Not At All, Somewhat, A lot
n=32. Small sample sizes please use caution when interpreting.

Kootenay Rockies

Exhibit 95: Kootenay Rockies – Indigenous Tourism Operators by Sector 2020

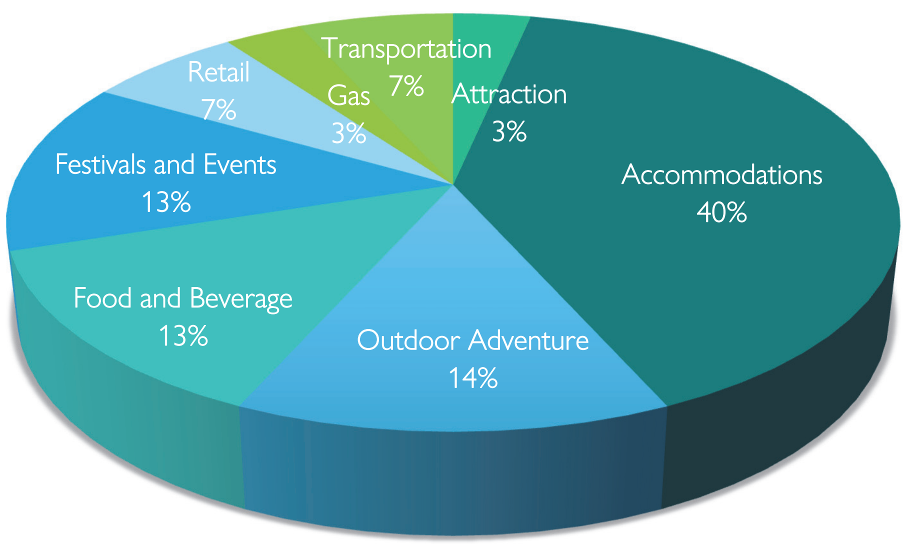


Exhibit 96: Kootenay Rockies – Indigenous Tourism Operators by Sector 2003 to 2020

Primary Tourism Sector	# 2020	% 2020	# 2017	% 2017	# 2003	% 2003	% Change since 2017	% Change since 2003
Attraction	1	3%	1	6%	3	20%	0%	-67%
Accommodations	12	40%	6	38%	3	20%	100%	300%
Outdoor Adventure	4	13%	5	31%	5	33%	-20%	-20%
Food and Beverage	4	13%	1	6%	0	0%	300%	100%
Festivals and Events	4	13%	1	6%	1	7%	300%	300%
Retail	2	7%	1	6%	1	7%	100%	100%
Gas	1	3%	0	0%	0	0%	100%	100%
Transportation	2	7%	1	6%	2	13%	100%	0%
Total	30	100%	16	100%	15	100%	88%	100%

Exhibit 97: Kootenay Rockies – Change in Businesses Since 2017

	2020
Previous # of businesses operating	16
LESS: No longer operating	1
= Continued operating	15
ADD: New Indigenous businesses	15
= Current Indigenous businesses operating	30
NET Change # Businesses (Gain/-Loss) since 2017	14
% Change over previous period	88%

Exhibit 98: Kootenay Rockies – Percentage Ownership by Type

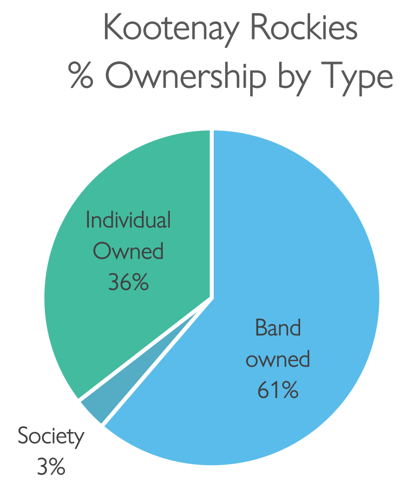


Exhibit 99: Kootenay Rockies – Employment by National Occupation Code (NOC)

Kootenay Rockies	Employed	% of Regional Total	% of Occupation Total FT	% FT	PT	% PT
Food and Beverage Servers	74	19%	19	25%	56	75%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	50	13%	9	18%	41	82%
Cooks	40	10%	27	67%	13	33%
Light Duty Cleaners	26	7%	9	35%	17	65%
Restaurant and Food Service Managers	24	6%	23	96%	1	4%
Landscaping and Grounds Maintenance Labourers	22	6%	5	23%	17	77%
Security Guards and Related Security Service Occupations	22	6%	12	52%	11	48%
Hotel Front Desk Clerks	20	5%	9	46%	11	54%
Service Station Attendants	18	5%	5	29%	13	71%
Accommodation Service Managers	14	4%	9	64%	5	36%
Other Managers	14	4%	14	100%	0	0%
Janitors, Caretakers and Building Superintendents	12	3%	3	25%	9	75%
Cashiers	9	2%	6	67%	3	33%
Chefs	8	2%	6	69%	3	31%
Other Customer and Information Services Representatives	6	2%	5	83%	1	17%
Bus Drivers, Subway Operators and Other Transit Operators	5	1%	1	20%	4	80%
Other Services Supervisors	5	1%	4	80%	1	20%
Accounting and Related Clerks	3	1%	2	67%	1	33%
Retail and Wholesale Trade Managers	3	1%	3	100%	0	0%
Tour and Travel Guides	3	1%	3	100%	0	0%
Accommodation, Travel, Tourism and Related Services Supervisors	2	1%	0	0%	2	100%
Accounting Technicians and Bookkeepers	2	1%	2	100%	0	0%
Executive Assistants	2	1%	2	100%	0	0%
Program Leaders and Instructors in Recreation, Sport and Fitness	2	1%	2	100%	0	0%
Administrative Officers	1	0%	1	100%	0	0%
Bartenders	1	0%	0	0%	1	100%
Conference and Event Planners	1	0%	1	100%	0	0%
Financial Managers	1	0%	1	100%	0	0%
Professional Occupations in Advertising, Marketing and Public Relations	1	0%	1	100%	0	0%
All Occupations in KR	389	100%	181	47%	208	53%

Thompson Okanagan

Exhibit 100: Thompson Okanagan – Indigenous Tourism Operators by Sector 2020

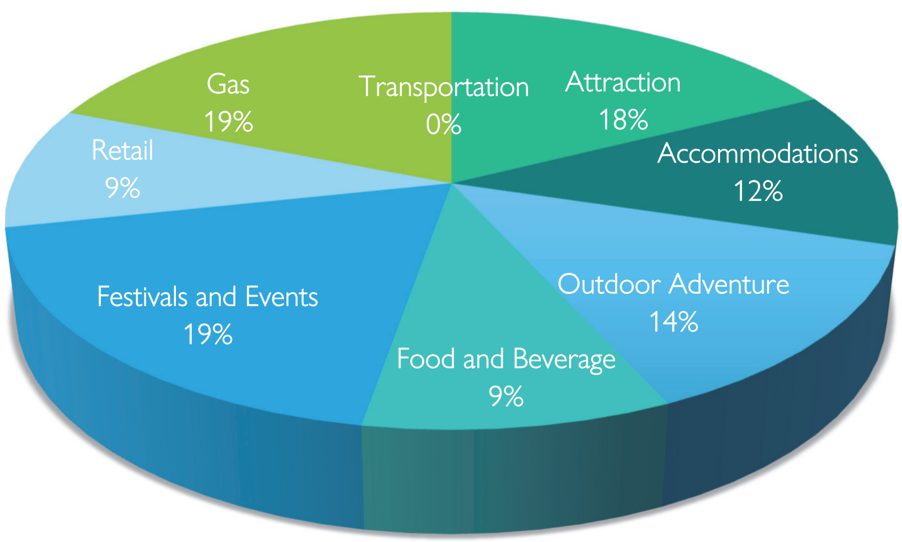


Exhibit 101: Thompson Okanagan – Indigenous Tourism Operators by Sector 2003 to 2020

Primary Tourism Sector	# 2020	% 2020	# 2017	% 2017	# 2003	% 2003	% Change since 2017	% Change since 2003
Attraction	13	18%	12	17%	6	25%	8%	117%
Accommodations	9	12%	8	11%	4	17%	13%	125%
Outdoor Adventure	10	14%	6	8%	1	4%	67%	900%
Food and Beverage	7	9%	7	10%	1	4%	0%	600%
Festivals and Events	14	19%	13	18%	6	25%	8%	133%
Retail	7	9%	12	17%	6	25%	-42%	17%
Gas	14	19%	14	19%	0	0%	0%	100%
Transportation	0	0%	0	0%	0	0%	100%	100%
Total	74	100%	72	100%	24	100%	3%	208%

Exhibit 102: Thompson Okanagan – Change in Businesses Since 2017

	2020
Previous # of businesses operating	72
LESS: No longer operating	1
= Continued operating	71
ADD: New Indigenous businesses	3
= Current Indigenous businesses operating	74
NET Change # Businesses (Gain/-Loss) since 2017	2
% Change over previous period	3%

Exhibit 103: Thompson Okanagan – Percentage Ownership by Type

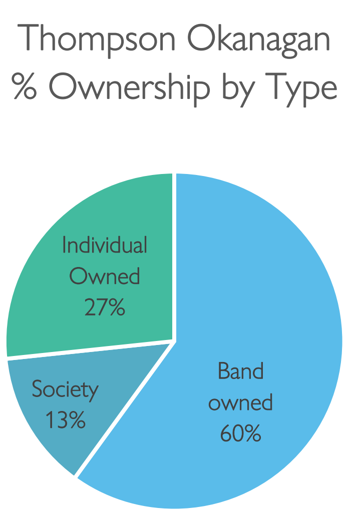


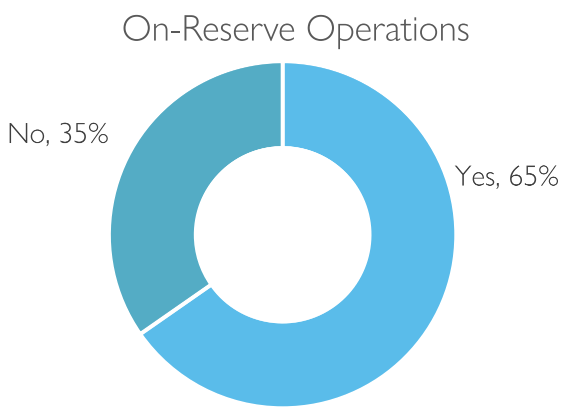
Exhibit 104: Thompson Okanagan – Employment by National Occupation Code (NOC)

Thompson Okanagan	Employed	% of Regional Total	% of Occupation Total FT	% FT	PT	% PT
Retail and Wholesale Trade Managers	86	17%	28	32%	58	68%
Service Station Attendants	86	17%	53	62%	33	38%
Cooks	73	14%	33	45%	40	55%
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	58	11%	33	57%	25	43%
Retail Salesperson	53	10%	35	67%	18	33%
Landscaping and Grounds Maintenance Labourers	40	8%	18	44%	23	56%
Tour and Travel Guides	28	5%	13	45%	15	55%
Administrative Assistant	13	2%	10	80%	3	20%
Janitors, Caretakers and Building Superintendents	13	2%	8	60%	5	40%
Harvesting Labourers	10	2%	0	0%	10	100%
Restaurant and Food Service Managers	10	2%	10	100%	0	0%
Artisans and Craftspersons	8	1%	5	67%	3	33%
Accounting Technicians and Bookkeepers	5	1%	3	50%	3	50%
Chefs	5	1%	0	0%	5	100%
Program Leaders and Instructors In Recreation, Sport and Fitness	5	1%	0	0%	5	100%
Technical Occupations Related to Museums and Art Galleries	5	1%	3	50%	3	50%
Accommodation Service Managers	3	0%	3	100%	0	0%
Administrative Officers	3	0%	0	0%	3	100%
Conference and Event Planners	3	0%	3	100%	0	0%
Hotel Front Desk Clerks	3	0%	3	100%	0	0%
Outdoor Sport and Recreational Guides	3	0%	0	0%	3	100%
Purchasing and Inventory Control Workers	3	0%	0	0%	3	100%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	3	0%	3	100%	0	0%
Accommodation, Travel, Tourism and Related Services Supervisors	0	0%	0		0	
All Occupations in TOTA	516	100%	260	50%	255	50%

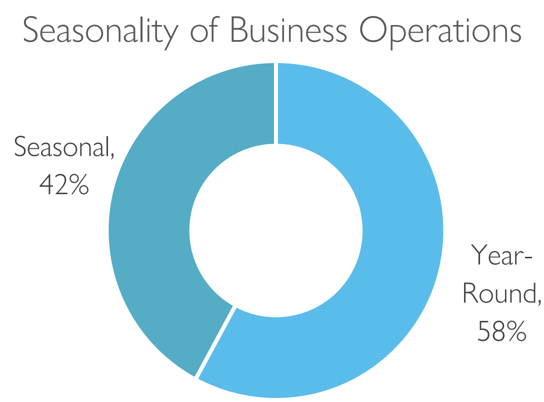
Kootenay Rockies and Thompson Okanagan – Indigenous Tourism Business Survey Results

Business Profile

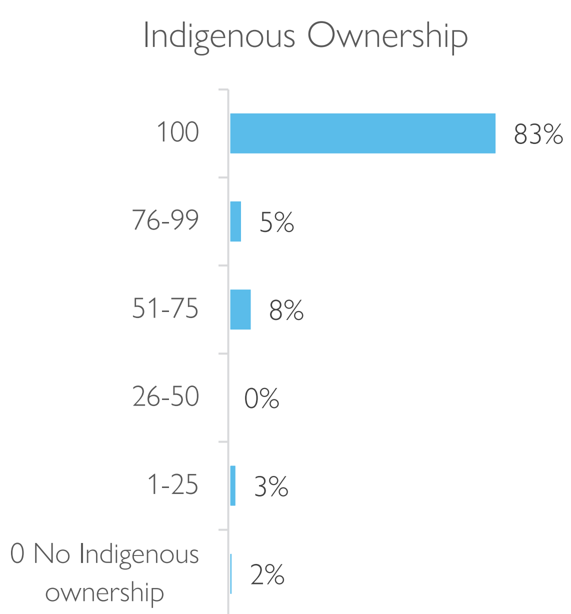
Exhibit 105: Kootenay Rockies and Thompson Okanagan – Indigenous Tourism Business Profile



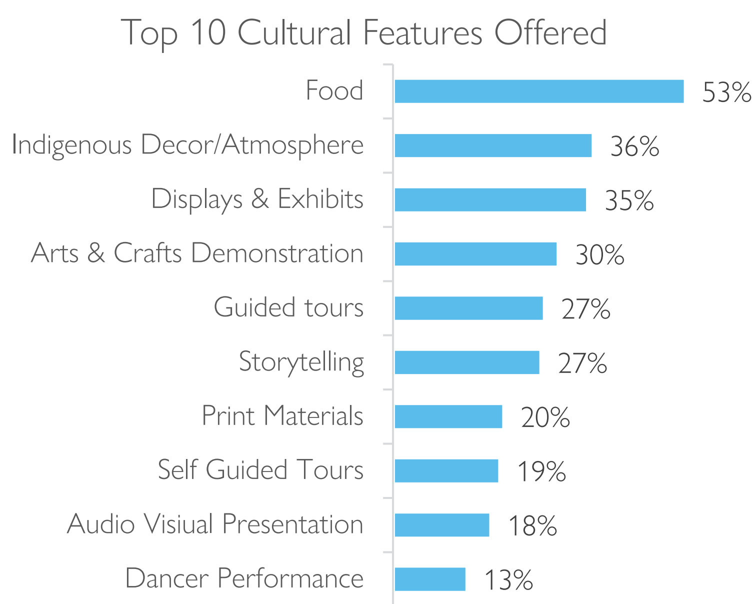
Does your business primarily operate on-reserve? n=39



What months of the year does your business primarily operator? n=38



What percentage (%) of this tourism business is Indigenous owned? n=39

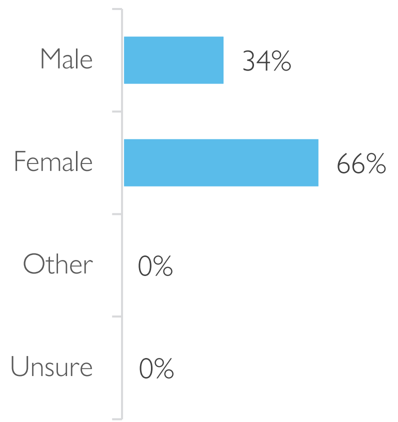


What Indigenous cultural features/activities characterize your tourism business? n=42.
42 businesses selected 158 cultural features.
Note: Businesses could select multiple months of operation therefore it is expected that percentages do not total 100%.

Employee Profile

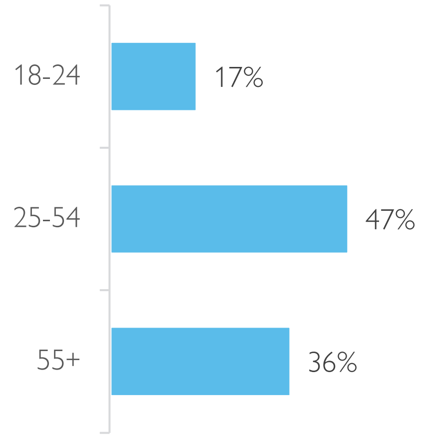
Exhibit 106: Kootenay Rockies and Thompson Okanagan – Indigenous Tourism Business Employee Profile

Gender of Business Employees
(Average %)



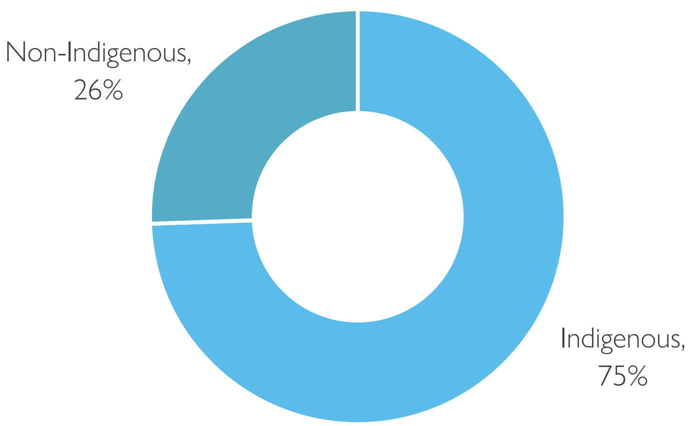
How many employees are typically male, female, other, unsure? n=20
Small sample sizes please use caution when interpreting.

Age of Business Employees
(Average %)



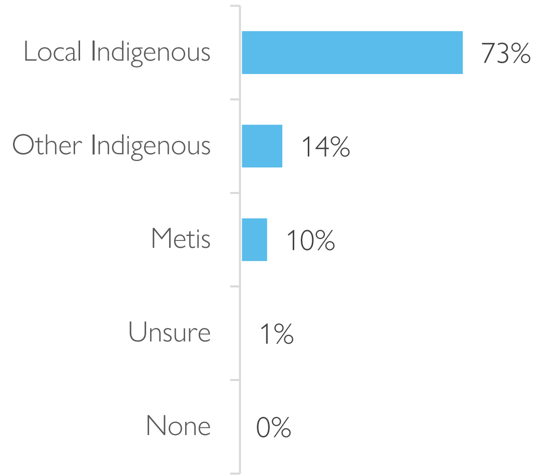
Overall, how many employees fall in the each of the following age categories? n=21
Small sample sizes please use caution when interpreting.

Indigenous Employees
(Average %)



Overall, about how many or what percent of these employees were: n=28
Small sample sizes please use caution when interpreting.

Origin of Indigenous Employees
(Average %)

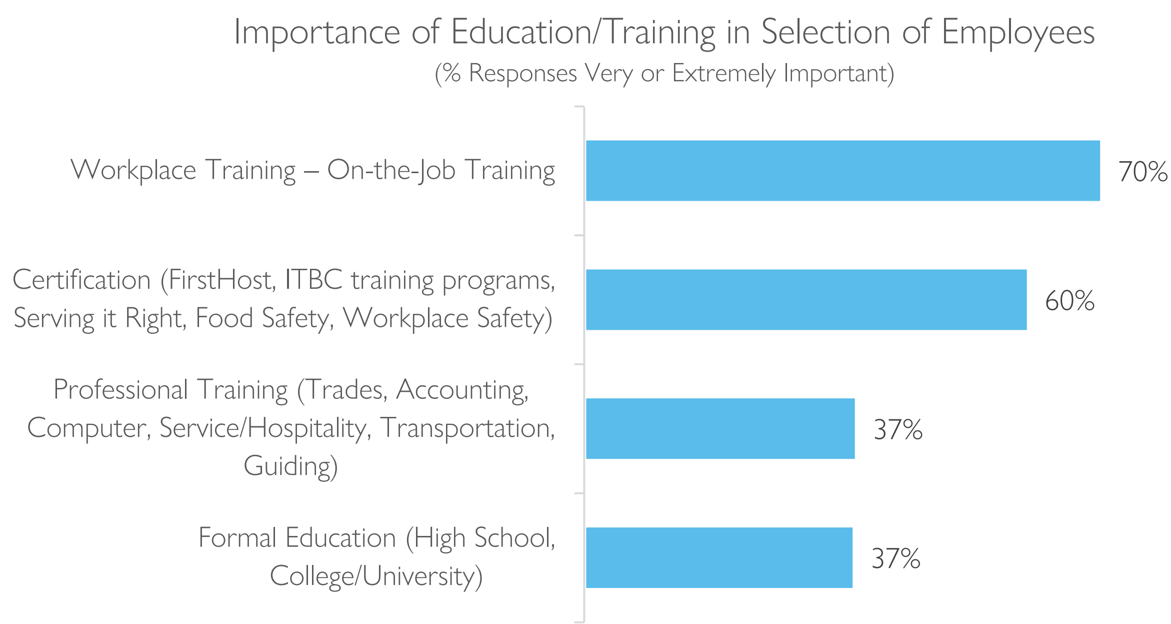


Overall, about how many or what % of the Indigenous personnel were? n=28
Small sample sizes please use caution when interpreting.

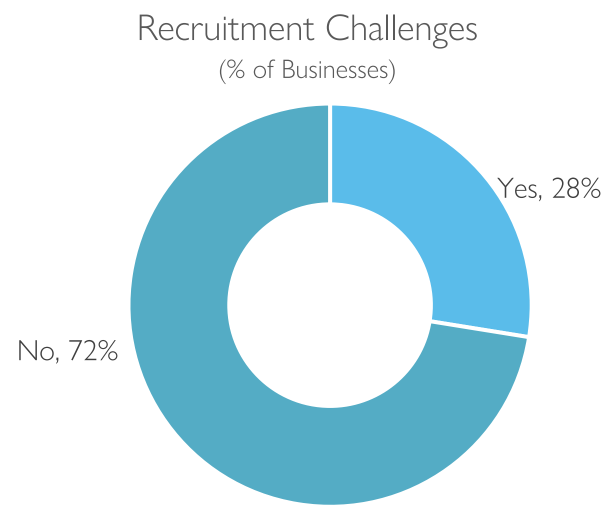
Skills and Recruitment

Exhibit 107: Kootenay Rockies and Thompson Okanagan – Indigenous Tourism Business Skills and Recruitment Profile

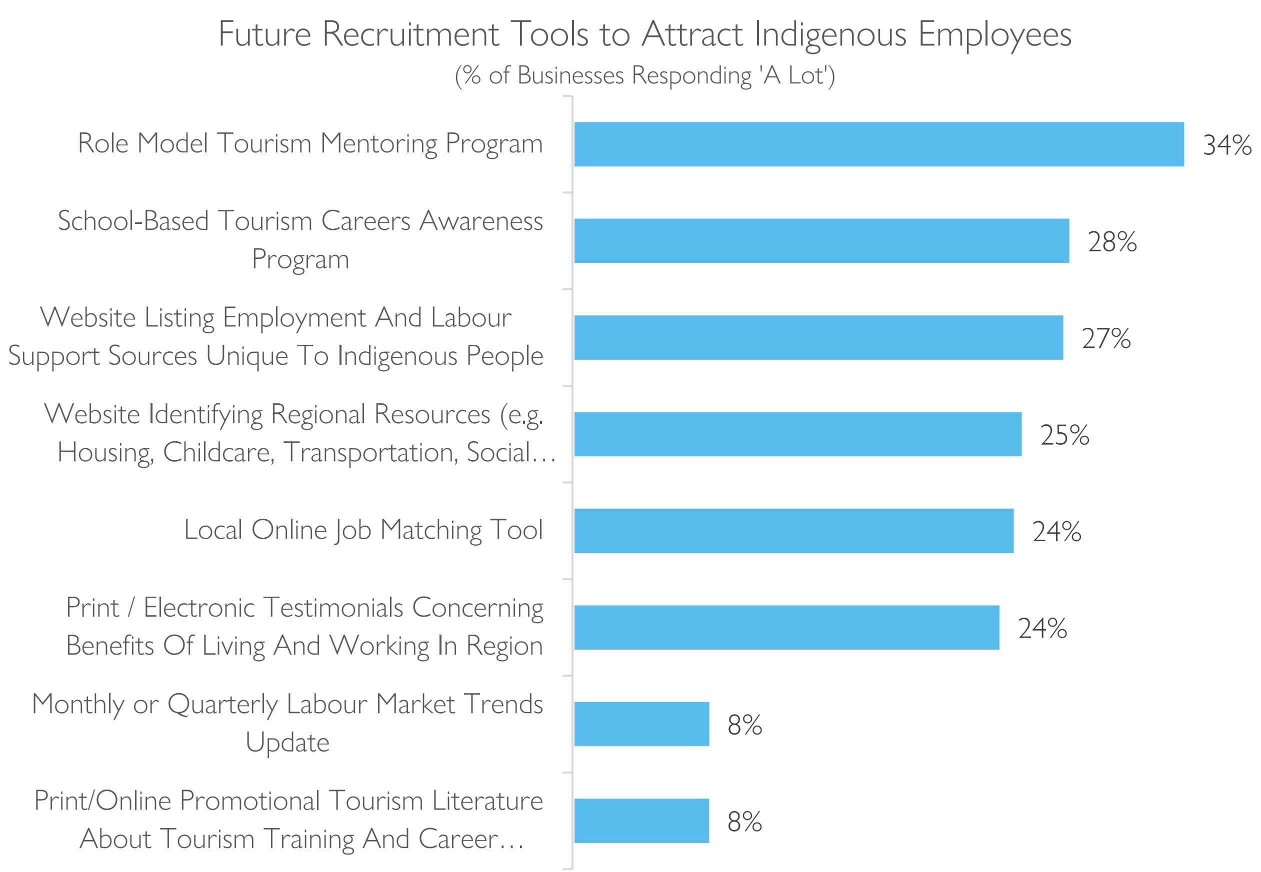
Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.
30 business responded with 87 responses.



How important were the presence of the following formal education/training qualifications in your typical selection of employees?
n=24. Small sample sizes please use caution when interpreting.



Overall, did your tourism business have any challenges recruiting its required employee complement in 2019, n=26.
Small sample sizes please use caution when interpreting.



Over the next 5 years (2020/24, to what extend would the availability of the following recruitment tools help your company attract Indigenous employees? Not At All, Somewhat, A lot
n=21. Small sample sizes please use caution when interpreting.

Vancouver Coast and Mountains

Exhibit 108: Vancouver Coast and Mountains – Indigenous Tourism Operators by Sector 2020

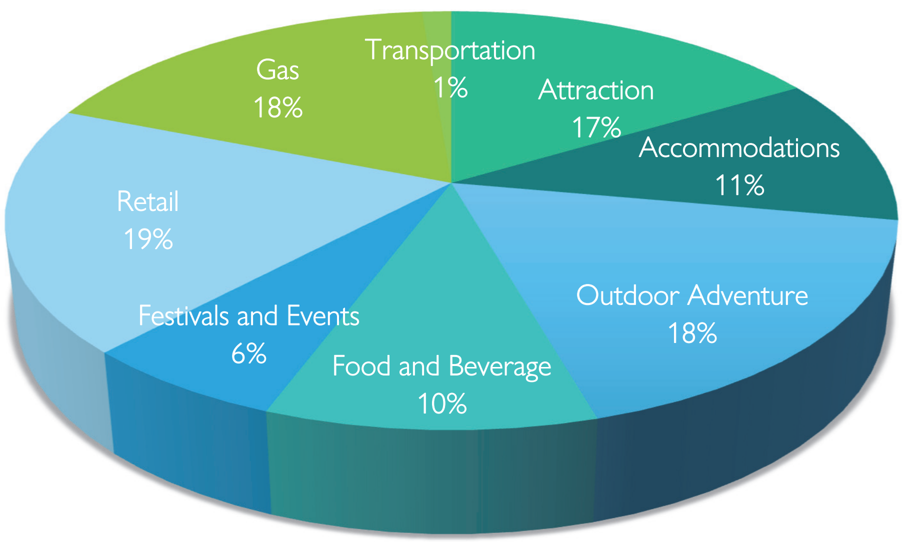


Exhibit 109: Vancouver Coast and Mountains – Indigenous Tourism Operators by Sector 2003 to 2020

Primary Tourism Sector	# 2020	% 2020	# 2017	% 2017	# 2003	% 2003	% Change since 2017	% Change since 2003
Attraction	12	13%	13	16%	9	21%	-8%	33%
Accommodations	18	19%	9	11%	2	5%	100%	800%
Outdoor Adventure	9	10%	14	18%	3	7%	-36%	200%
Food and Beverage	12	13%	8	10%	4	10%	50%	200%
Festivals and Events	9	10%	5	6%	13	31%	80%	-31%
Retail	15	16%	15	19%	9	21%	0%	67%
Gas	15	16%	14	18%	1	2%	7%	1400%
Transportation	4	4%	1	1%	1	2%	300%	300%
Total	94	100%	79	100%	42	100%	19%	124%

Exhibit 110: Vancouver Coast and Mountains – Change in Businesses Since 2017

	2020
Previous # of businesses operating	79
LESS: No longer operating	1
= Continued operating	78
ADD: New Indigenous businesses	16
= Current Indigenous businesses operating	94
NET Change # Businesses (Gain/-Loss) since 2017	15
% Change over previous period	19%

Exhibit 111: Vancouver Coast and Mountains – Percentage Ownership by Type

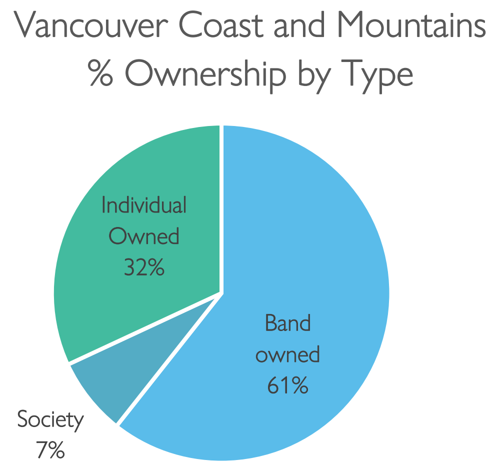


Exhibit 112: Vancouver, Coast and Mountains – Employment by National Occupation Code (NOC)

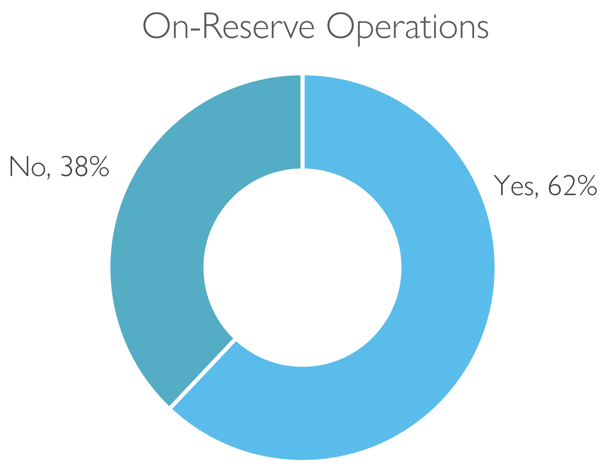
Vancouver, Coast and Mountains	Employed	% of Regional Total	% of Occupation Total			
			FT	% FT	PT	% PT
Restaurant and Food Service Managers	455	43%	144	32%	311	68%
Service Station Attendants	81	8%	76	94%	5	6%
Food and Beverage Servers	58	6%	43	74%	15	26%
Retail Salesperson	56	5%	38	68%	18	32%
Cooks	46	4%	35	78%	10	22%
Tour and Travel Guides	43	4%	20	47%	23	53%
Retail and Wholesale Trade Managers	40	4%	35	88%	5	13%
Outdoor Sport and Recreational Guides	38	4%	33	87%	5	13%
Accommodation Service Managers	33	3%	20	62%	13	38%
Public Works Maintenance Equipment Operators and Related Workers	20	2%	10	50%	10	50%
Chefs	18	2%	13	71%	5	29%
Bus Drivers, Subway Operators and Other Transit Operators	15	1%	10	67%	5	33%
Conference and Event Planners	15	1%	0	0%	15	100%
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	15	1%	8	50%	8	50%
Janitors, Caretakers and Building Superintendents	13	1%	5	40%	8	60%
Library, Archive, Museum and Art Gallery Managers	13	1%	13	100%	0	0%
Accounting Technicians and Bookkeepers	10	1%	3	25%	8	75%
Boat and Cable Ferry Operators and Related Occupations	8	1%	3	33%	5	67%
General Office Support Workers	8	1%	3	33%	5	67%
Operators and Attendants In Amusement, Recreation and Sport	8	1%	8	100%	0	0%
Other Services Supervisors	8	1%	3	33%	5	67%
Security Guards and Related Security Service Occupations	8	1%	5	67%	3	33%
Technical Occupations Related to Museums and Art Galleries	8	1%	8	100%	0	0%
Accommodation, Travel, Tourism and Related Services Supervisors	5	0%	5	100%	0	0%
Cashiers	5	0%	0	0%	5	100%
Harvesting Labourers	5	0%	0	0%	5	100%

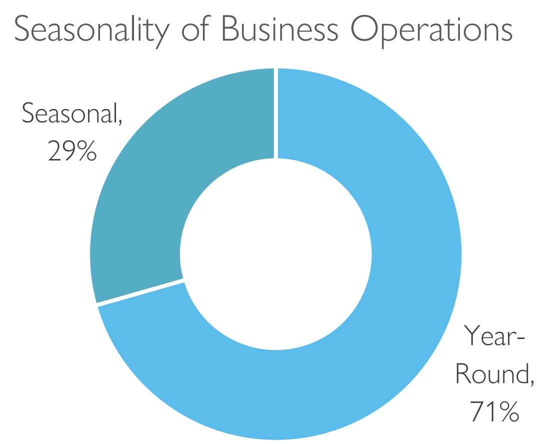
Vancouver, Coast and Mountains	Employed	% of Regional Total	% of Occupation Total			
			FT	% FT	PT	% PT
Other Customer and Information Services Representatives	5	0%	5	100%	0	0%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	5	0%	5	100%	0	0%
Administrative Assistant	3	0%	3	100%	0	0%
Artisans and Craftspersons	3	0%	0	0%	3	100%
Delivery and Courier Service Drivers	3	0%	0	0%	3	100%
Executive Assistants	3	0%	3	100%	0	0%
Hotel Front Desk Clerks	3	0%	3	100%	0	0%
Light Duty Cleaners	3	0%	0	0%	3	100%
Receptionists	3	0%	3	100%	0	0%
All Occupations in VCM	1,057	100%	559	53%	498	47%

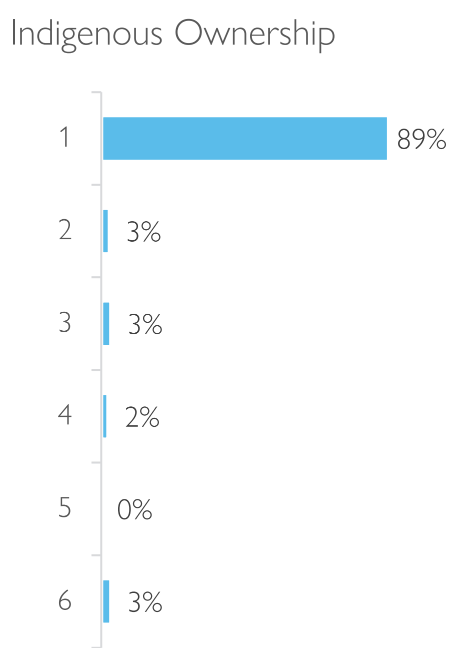
Vancouver Coast and Mountains – Indigenous Tourism Business Survey Results

Business Profile

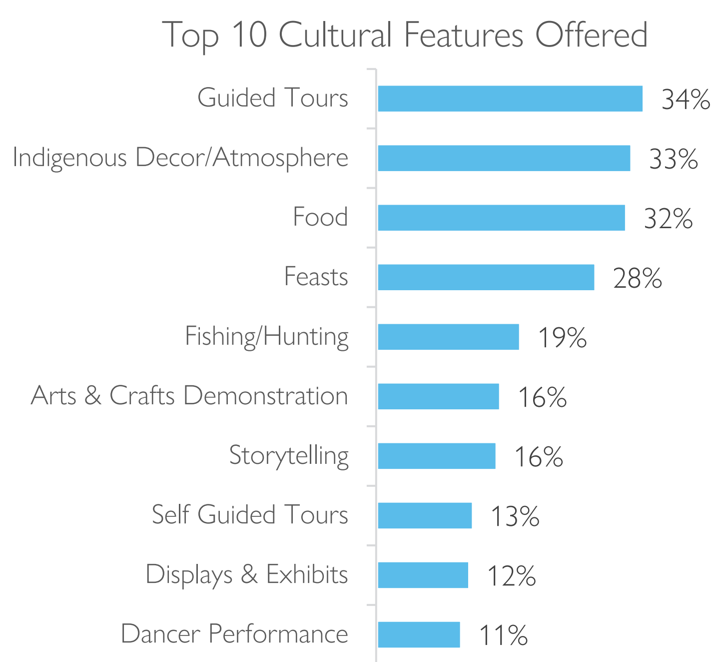
Exhibit 113: Vancouver Coast and Mountains – Indigenous Tourism Business Profile







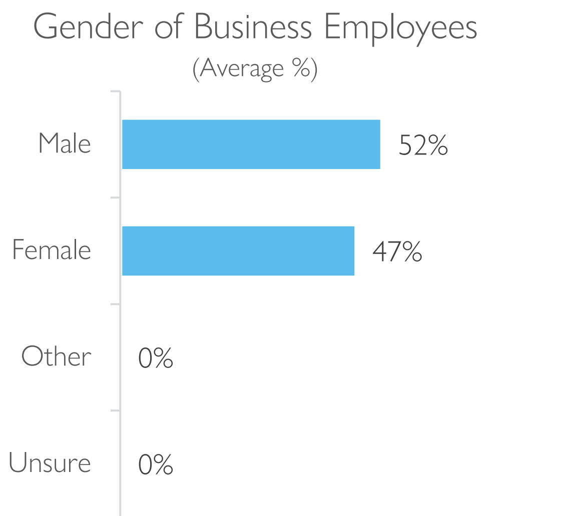
What percentage (%) of this tourism business is Indigenous owned? n=37



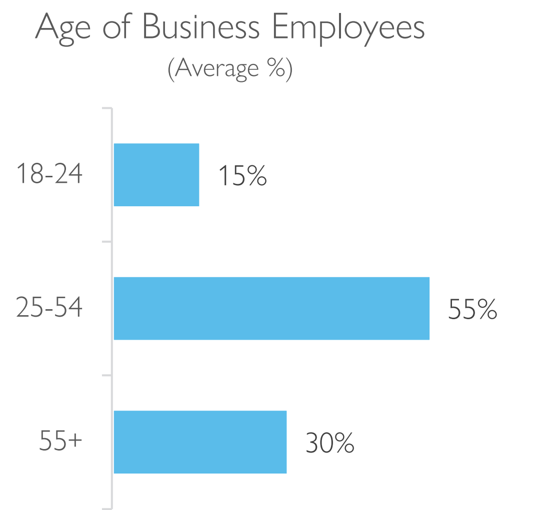
What Indigenous cultural features/activities characterize your tourism business?
40 Businesses selected 108 cutlural features.
Note: Businesses could select multiple cultural features therefore it is expected that percentages do not total 100%.

Employee Profile

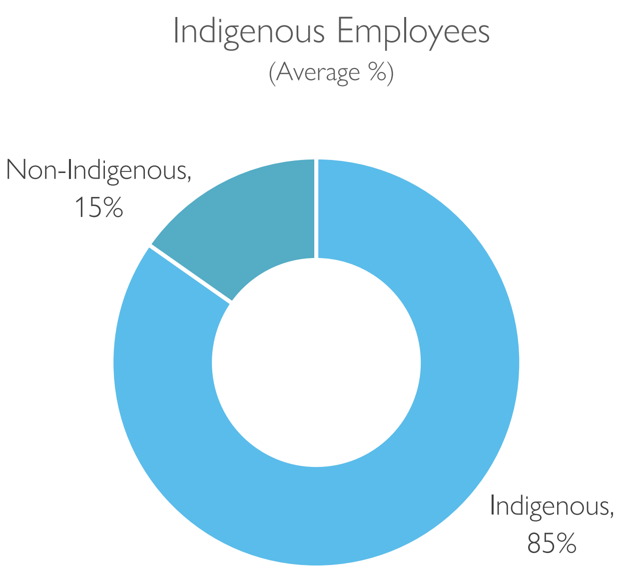
Exhibit 114: Vancouver Coast and Mountains – Indigenous Tourism Business Employee Profile



How many employees are typically male, female, other, unsure? n=24
Small sample sizes please use caution when interpreting.



Overall, how many employees fall in the each of the following age categories? n=24
Small sample sizes please use caution when interpreting.



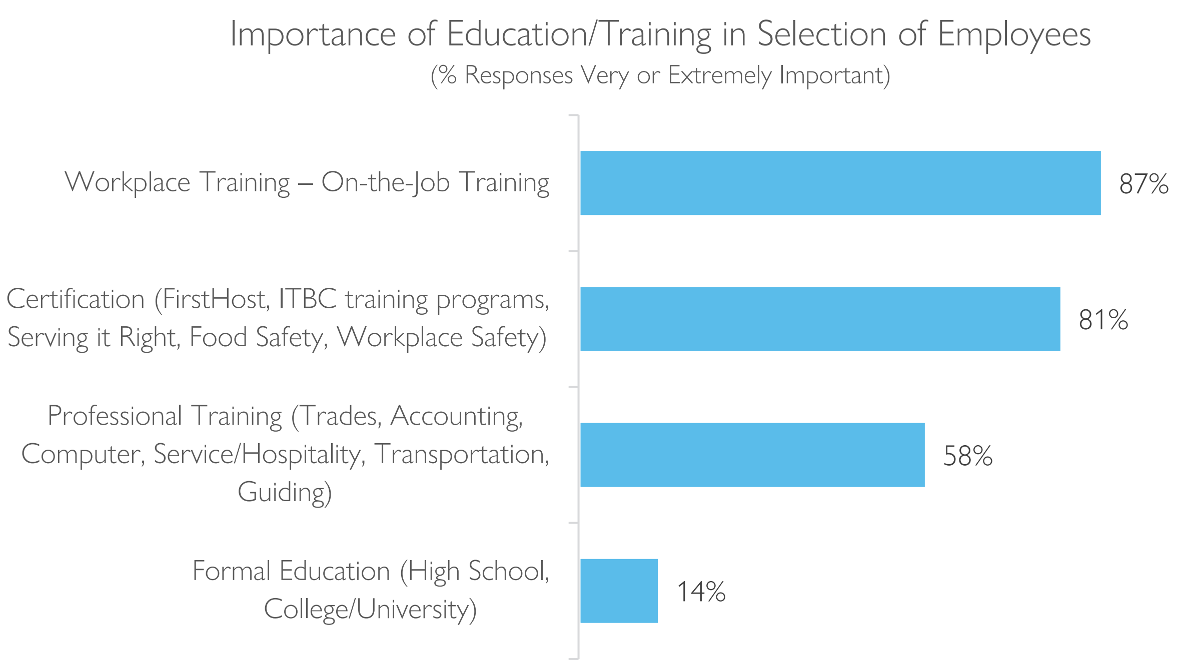
Overall, about how many or what percent of these employees were: n=33

Overall, about how many or what % of the Indigenous personell were? n=33

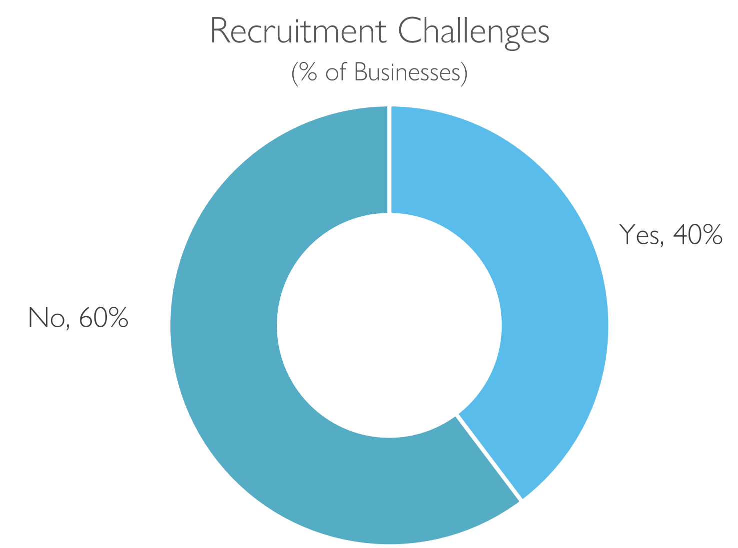
Skills and Recruitment

Exhibit 115: Vancouver Coast and Mountains – Indigenous Tourism Business Skills and Recruitment Profile

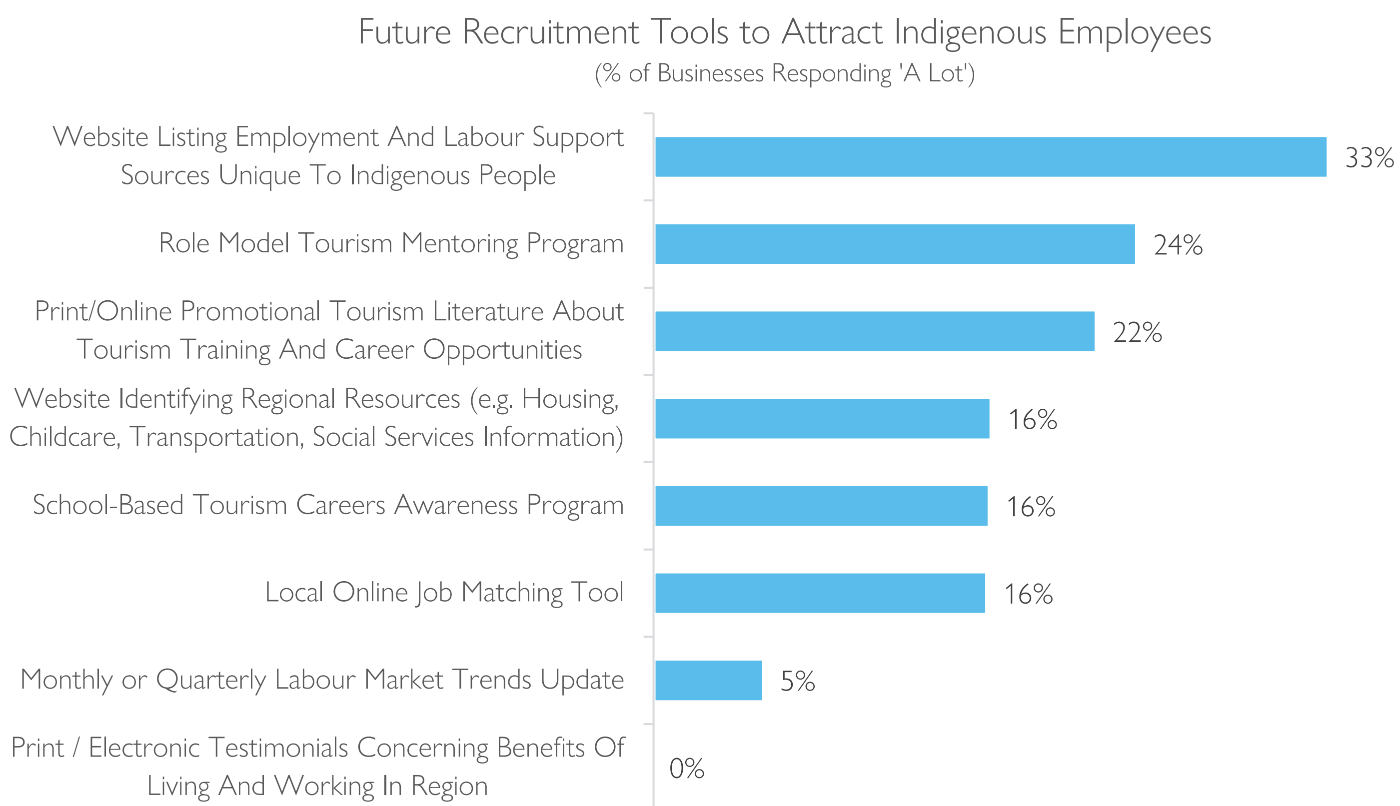
Overall, what uniquely Indignenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.



How important were the presence of the following formal education/training qualifications in yoru typical selection of employees?
n=24. Small sample sizes please use caution when interpreting.



Overall, did your tourism business have any challenges recruiting its required employee complement in 2019, n=24.
Small sample sizes please use caution when interpreting.



Over the next 5 years (2020/24, to what extend would the availability of the following recruitment tools help your company attract Indigenous employees?
Not At All, Somewhat, A lot
n=20. Small sample sizes please use caution when interpretiing.

Vancouver Island

Exhibit 116: Vancouver Island – Indigenous Tourism Operators by Sector 2020

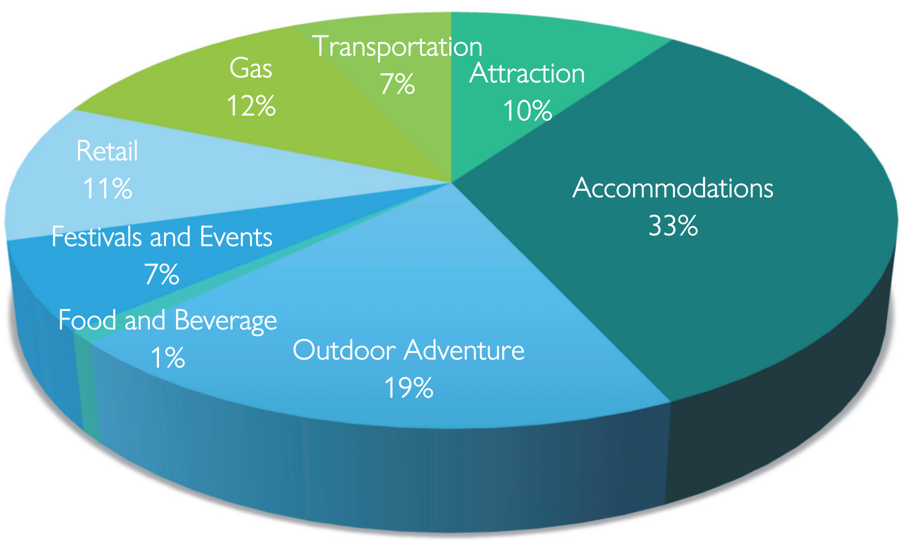


Exhibit 117: Vancouver Island – Indigenous Tourism Operators by Sector 2003 to 2020

Primary Tourism Sector	# 2020	% 2020	# 2017	% 2017	# 2003	% 2003	% Change since 2017	% Change since 2003
Attraction	10	10%	9	10%	8	15%	11%	25%
Accommodations	34	33%	25	28%	11	20%	36%	209%
Outdoor Adventure	20	20%	25	28%	17	31%	-20%	18%
Food and Beverage	1	1%	4	4%	0	0%	-75%	100%
Festivals and Events	7	7%	2	2%	3	5%	250%	133%
Retail	11	11%	9	10%	10	18%	22%	10%
Gas	12	12%	11	12%	1	2%	9%	1100%
Transportation	7	7%	4	4%	5	9%	75%	40%
Total	102	100%	89	100%	55	100%	15%	85%

Exhibit 118: Vancouver Island – Change in Businesses Since 2017

	2020
Previous # of businesses operating	89
LESS: No longer operating	0
= Continued operating	89
ADD: New Indigenous businesses	13
= Current Indigenous businesses operating	102
NET Change # Businesses (Gain/-Loss) since 2017	13
% Change over previous period	15%

Exhibit 119: Vancouver Island – Percentage Ownership by Type

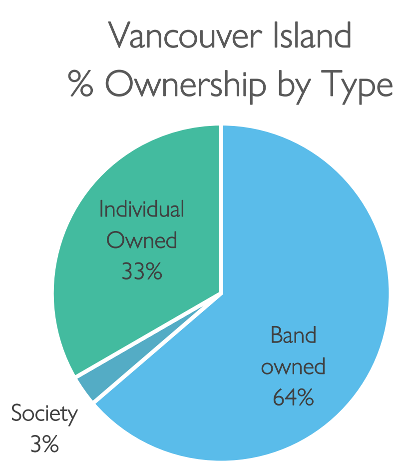


Exhibit 120: Vancouver Island– Employment by National Occupation Code (NOC)

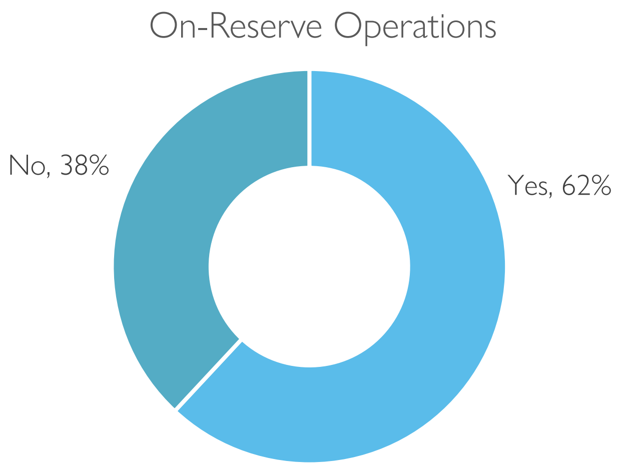
Vancouver Island	Employed	% of Regional Total	% of Occupation Total			
			FT	% FT	PT	% PT
Tour and Travel Guides	137	12%	73	54%	63	46%
Service Station Attendants	119	10%	83	70%	35	30%
Light Duty Cleaners	111	10%	53	48%	58	52%
Hotel Front Desk Clerks	109	10%	53	49%	56	51%
Accommodation Service Managers	91	8%	86	94%	5	6%
Retail Salesperson	68	6%	40	59%	28	41%
Retail and Wholesale Trade Managers	66	6%	63	96%	3	4%
Food Counter Attendants, Kitchen Helpers and Related Support Occupations	63	6%	18	28%	46	72%
Food and Beverage Servers	58	5%	46	78%	13	22%
Support Occupations in Accommodation, Travel and Facilities Set-Up Services	46	4%	46	100%	0	0%
Outdoor Sport and Recreational Guides	43	4%	28	65%	15	35%
Boat and Cable Ferry Operators and Related Occupations	28	2%	15	55%	13	45%
Cashiers	28	2%	18	64%	10	36%
Landscaping and Grounds Maintenance Labourers	28	2%	18	64%	10	36%
Janitors, Caretakers and Building Superintendents	25	2%	8	30%	18	70%
Cooks	23	2%	18	78%	5	22%
Transport Truck Drivers	15	1%	5	33%	10	67%
Accommodation, Travel, Tourism and Related Services Supervisors	10	1%	8	75%	3	25%
Chefs	10	1%	10	100%	0	0%
Operators and Attendants in Amusement, Recreation and Sport	10	1%	10	100%	0	0%
Bus Drivers, Subway Operators and Other Transit Operators	8	1%	3	33%	5	67%
Other Customer and Information Services Representatives	8	1%	5	67%	3	33%
Professional Occupations in Advertising, Marketing and Public Relations	8	1%	3	33%	5	67%
Technical Occupations Related to Museums and Art Galleries	8	1%	0	0%	8	100%
Accounting and Related Clerks	5	0%	5	100%	0	0%
Receptionists	5	0%	5	100%	0	0%

Vancouver Island	Employed	% of Regional Total	% of Occupation Total			
			FT	% FT	PT	% PT
Artisans and Craftspersons	3	0%	0	0%	3	100%
Bartenders	3	0%	3	100%	0	0%
Library, Archive, Museum and Art Gallery Managers	3	0%	0	0%	3	100%
Massage Therapists	3	0%	3	100%	0	0%
Restaurant and Food Service Managers	3	0%	3	100%	0	0%
Security Guards and Related Security Service Occupations	3	0%	0	0%	3	100%
All Occupations in VI	1,143	100%	726	63%	417	37%

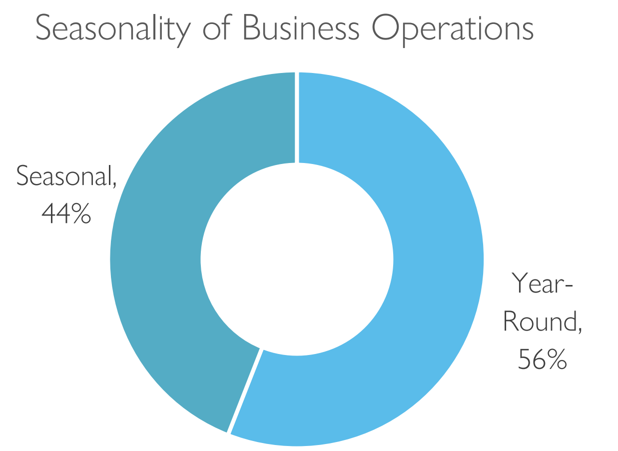
Vancouver Island – Indigenous Tourism Business Survey Results

Business Profile

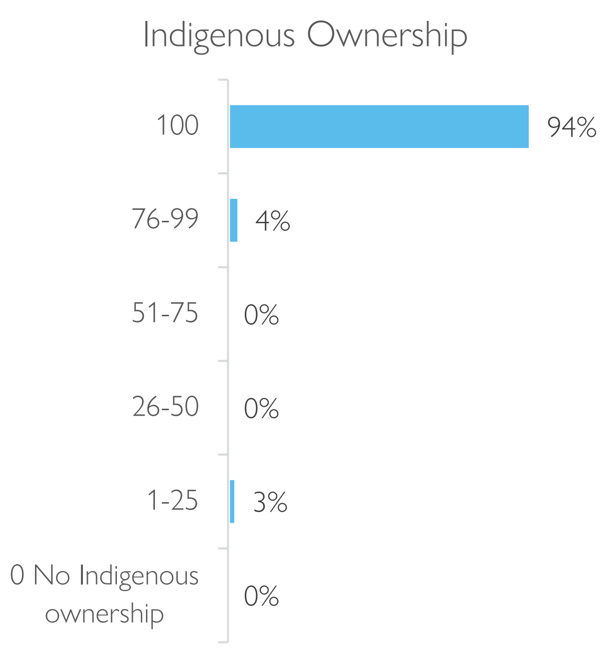
Exhibit 121: Vancouver Island – Indigenous Tourism Business Profile



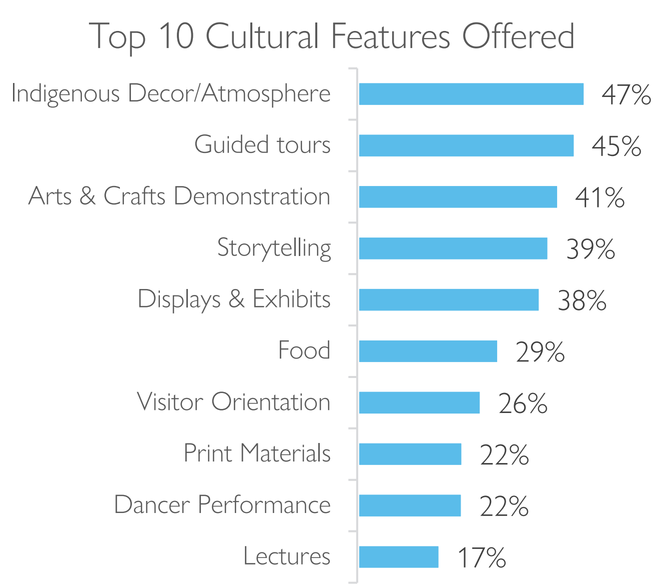
Does your business primarily operate on-reserve? n=44



What months of the year does your business primarily operate? n=46



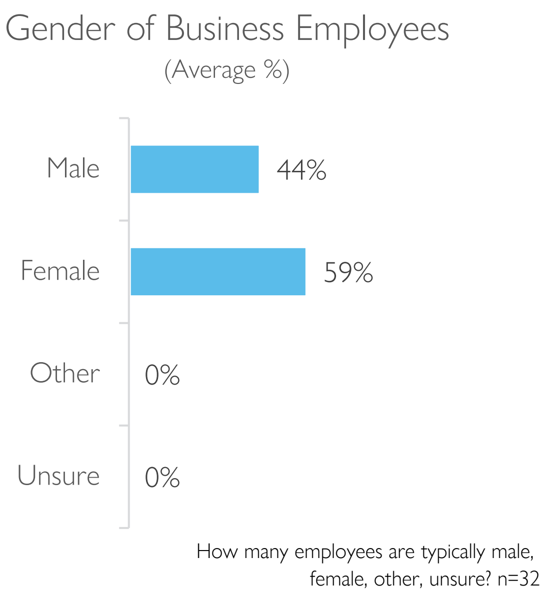
What percentage (%) of this tourism business is Indigenous owned? n=43

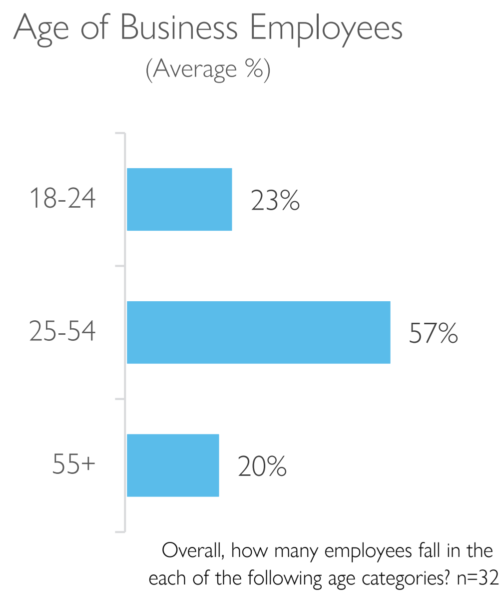


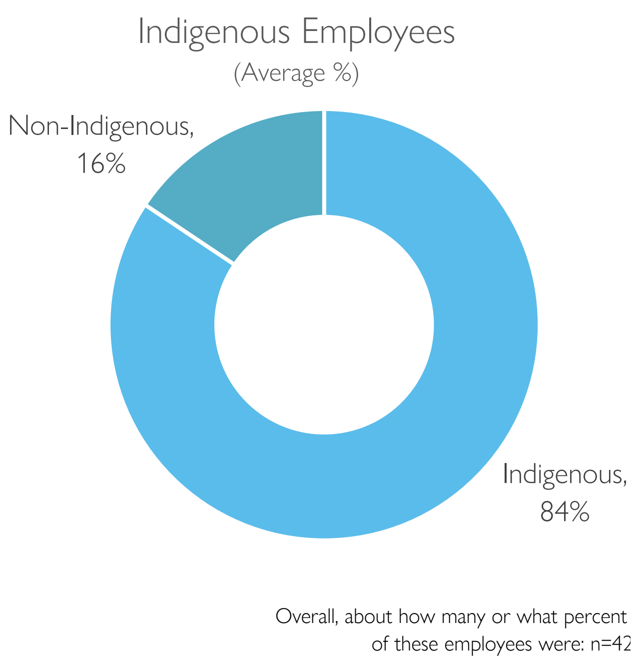
What Indigenous cultural features/activities characterize your tourism business? n=46.
46 Businesses selected 193 cutlural features.
Note: Businesses could select multiple cultural features therefore it is expected that percentages do not total 100%.

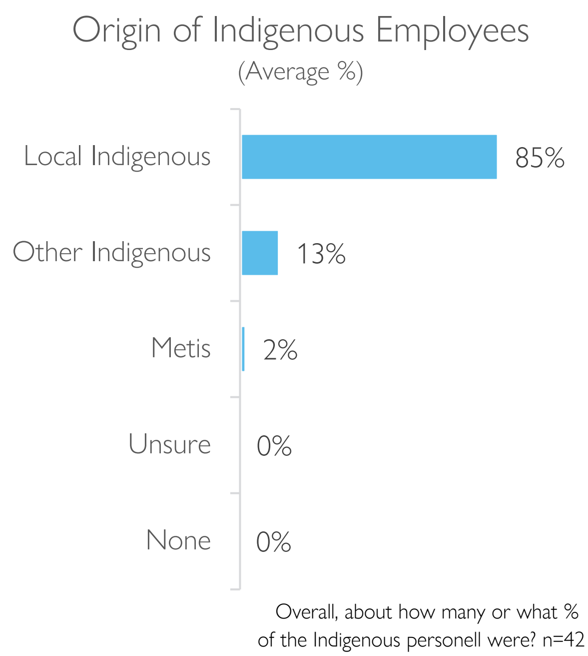
Employee Profile

Exhibit 122: Vancouver Island – Indigenous Tourism Business Employee Profile



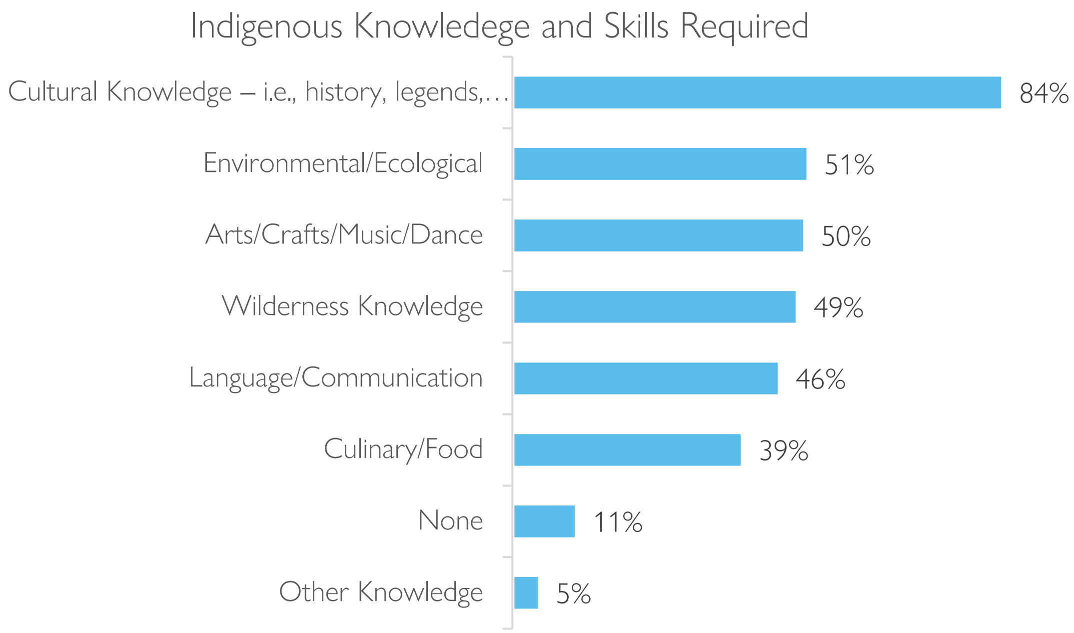


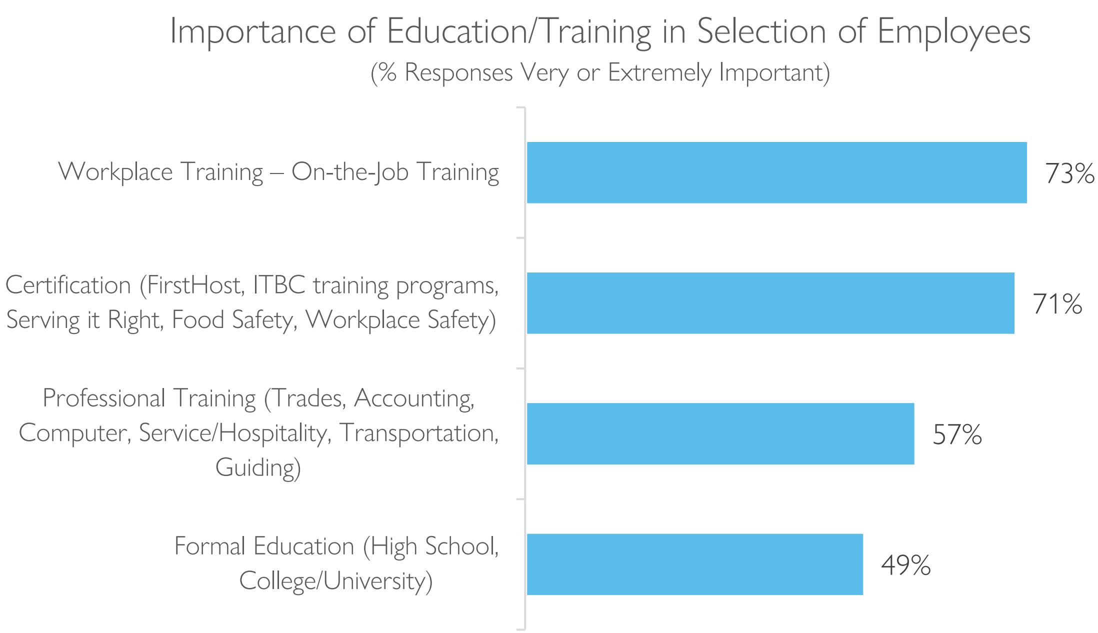




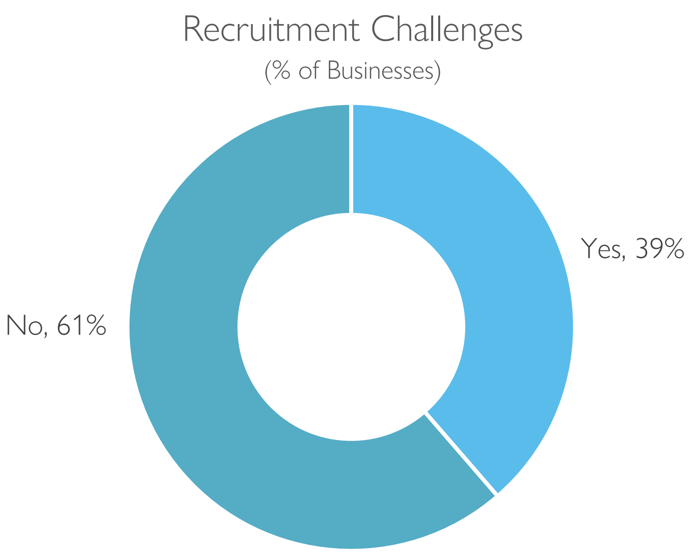
Skills and Recruitment

Exhibit 123: Vancouver Island – Indigenous Tourism Business Skills and Recruitment Profile

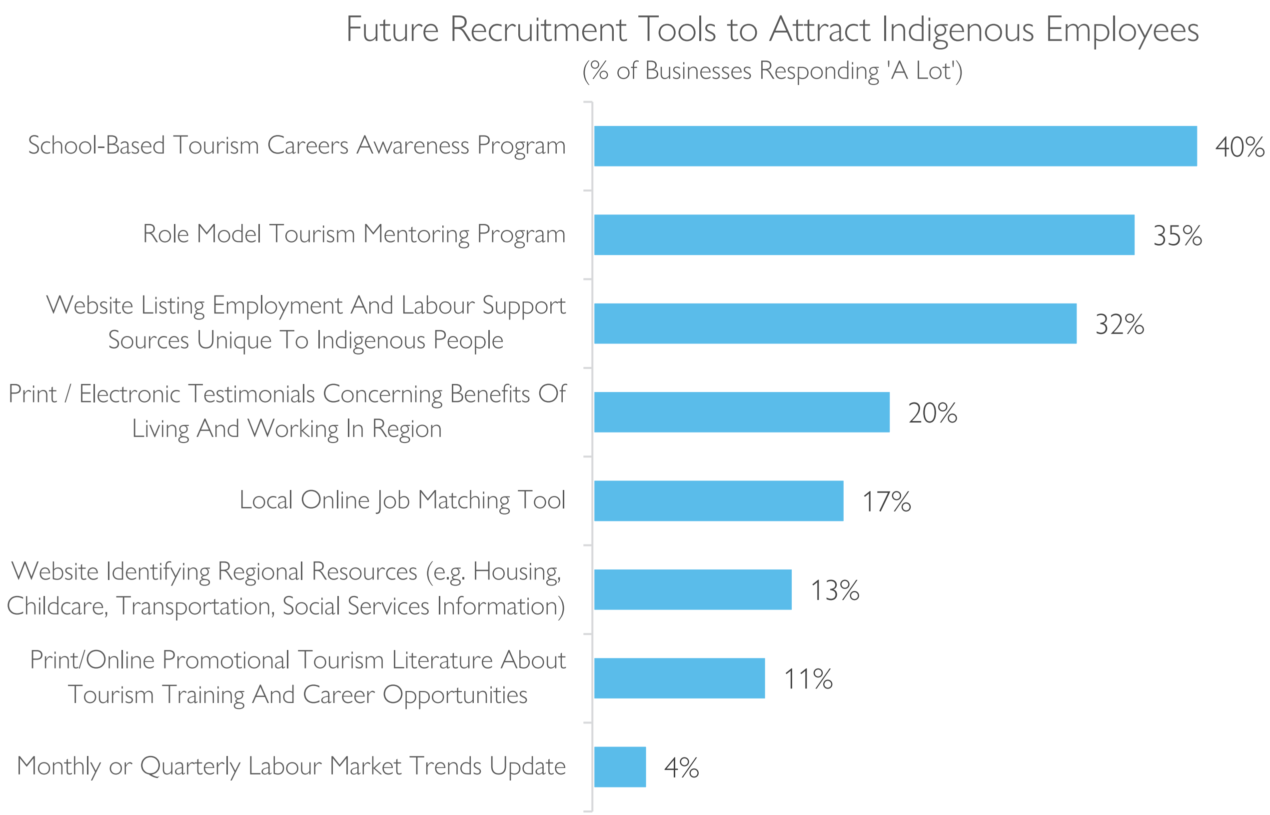




How important were the presence of the following formal education/training qualifications in yoru typical selection of employess?



Overall, did your tourism business have any challenges recruiting its required employee coplement in 2019, n=33



Over the next 5 years (2020/24, to what extend would the availability of the following recruitment tools help your company attract Indigenous employees?
Not At All, Somewhat, A lot
n=33. Small sample sizes please use caution when interpretiing.

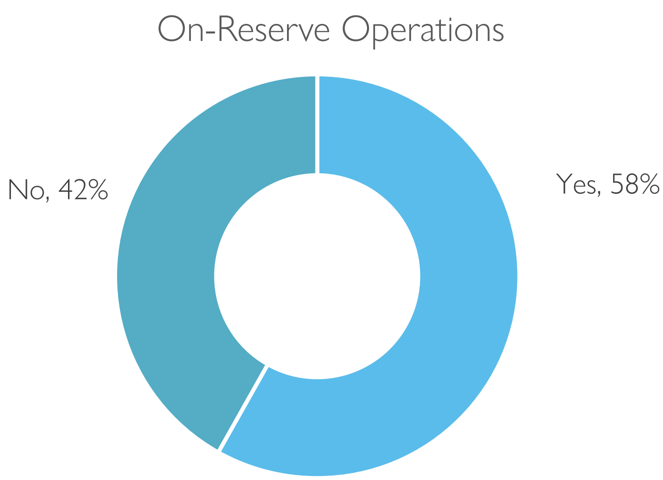
APPENDIX C: INDIGENOUS TOURISM BUSINESS SURVEY RESULTS BY TOURISM SECTOR

**The following sector profiles are survey results for sectors where sufficient responses were received to generate profiles. Sectors not presented did not have enough information to produce a summary.*

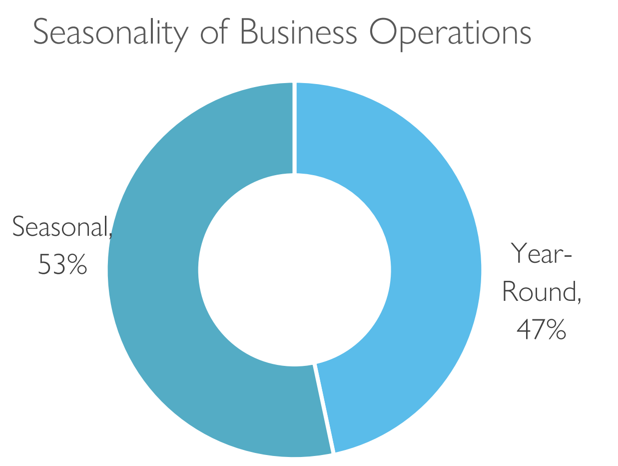
Accommodations

Business Profile

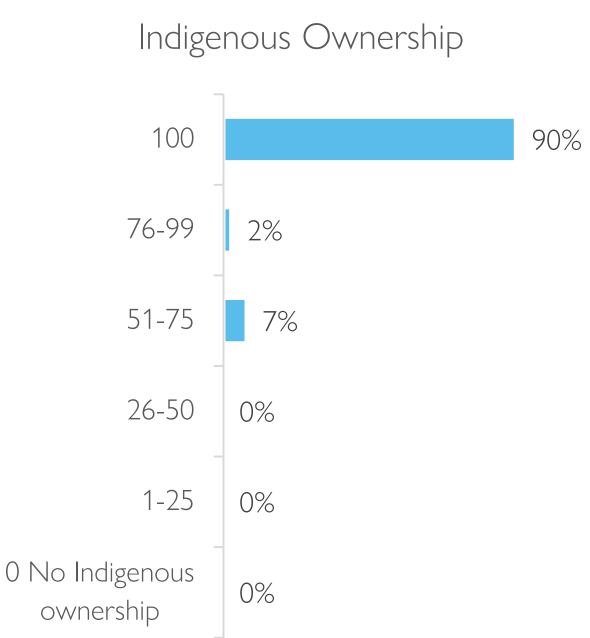
Exhibit 124: Accommodations – Indigenous Tourism Business Profile



Does your business primarily operate on-reserve? n=43



What months of the year does your business primarily operate? n=45

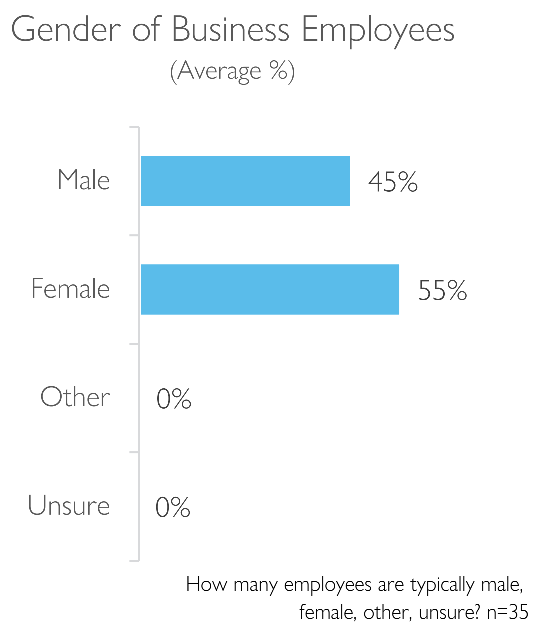


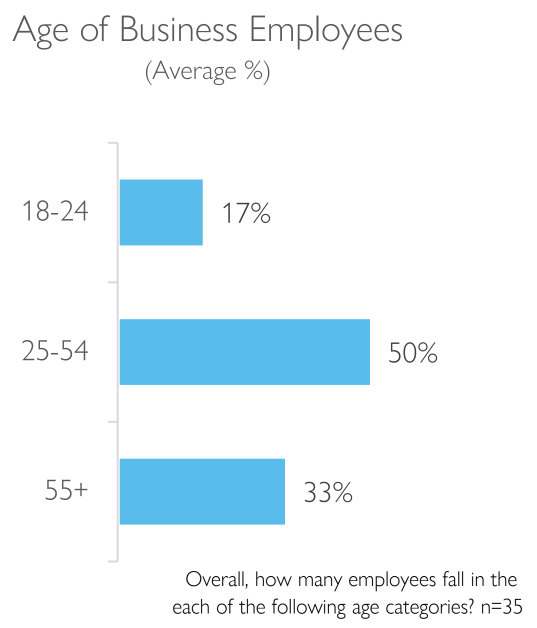
What percentage (%) of this tourism business is Indigenous owned? n=42

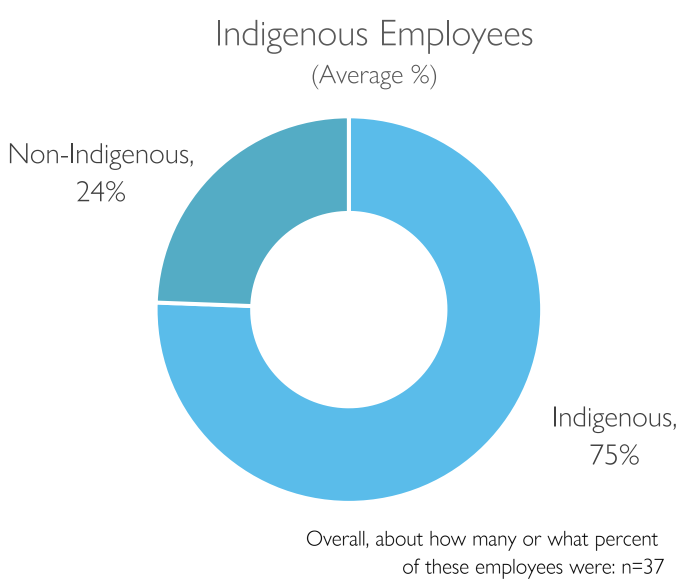
What Indigenous cultural features/activities characterize your tourism business? n=46
46 businesses selected 212 cultural features.
Note: Businesses could select multiple months of operation therefore it is expected that percentages do not total 100%.

Employee Profile

Exhibit 125: Accommodations – Indigenous Tourism Business Employee Profile

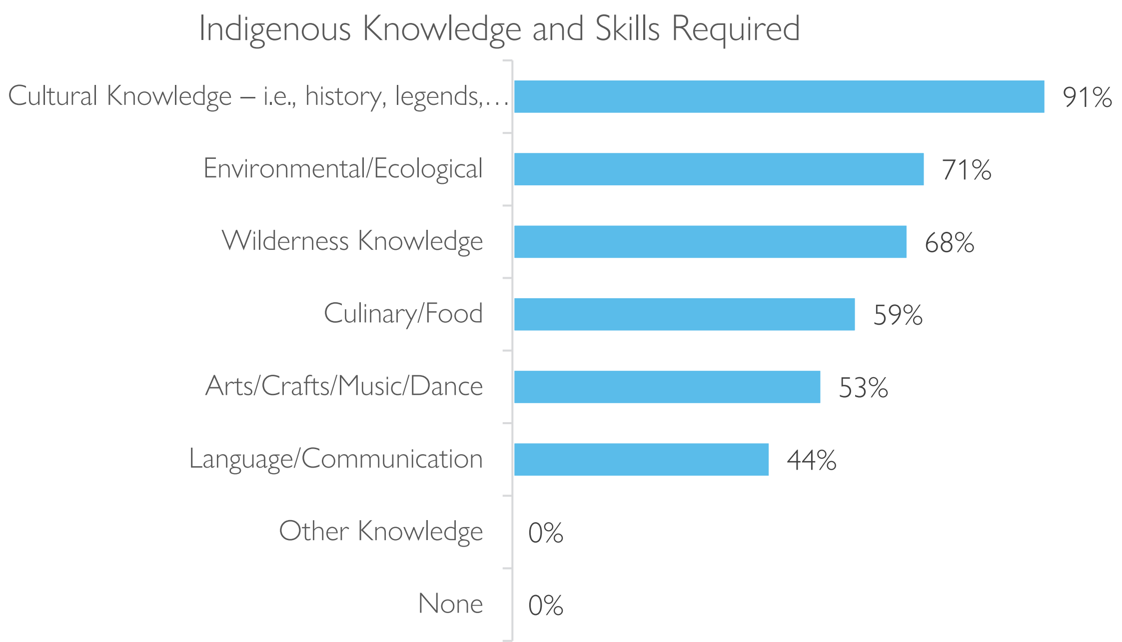




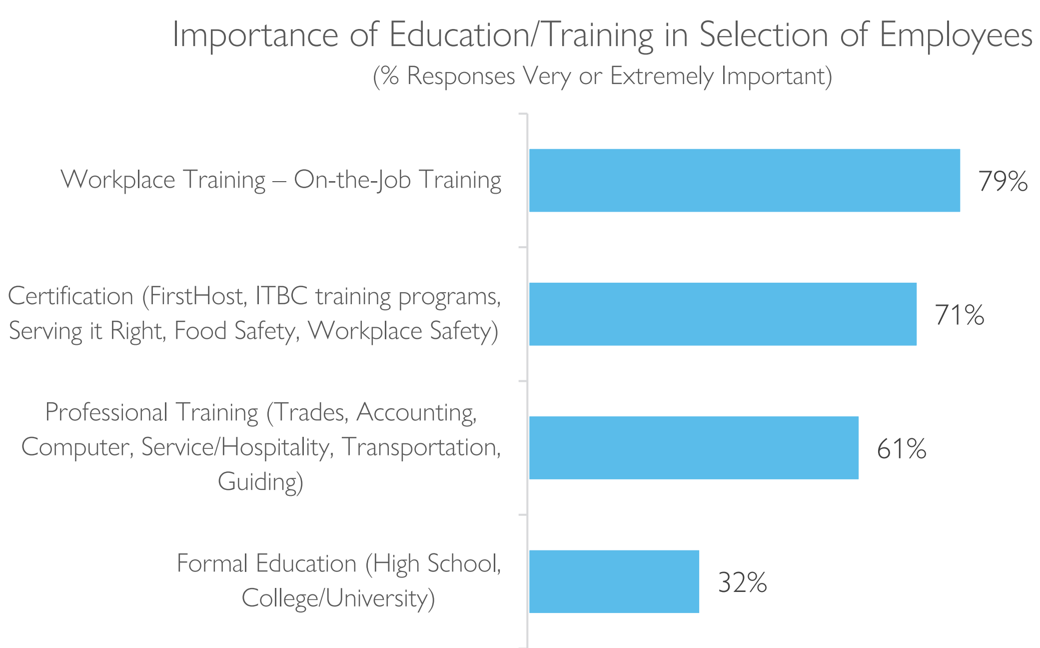


Skills and Recruitment

Exhibit 126: Accommodations – Indigenous Tourism Business Skills and Recruitment Profile



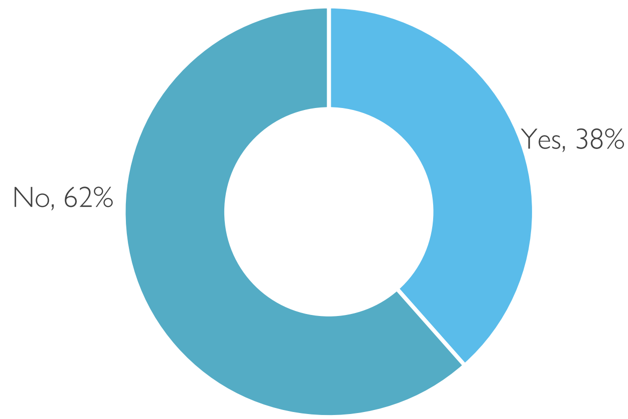
Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.
34 business responded with 131 responses.



How important were the presence of the following formal education/training qualifications in your typical selection of employees?
n=38

Recruitment Challenges

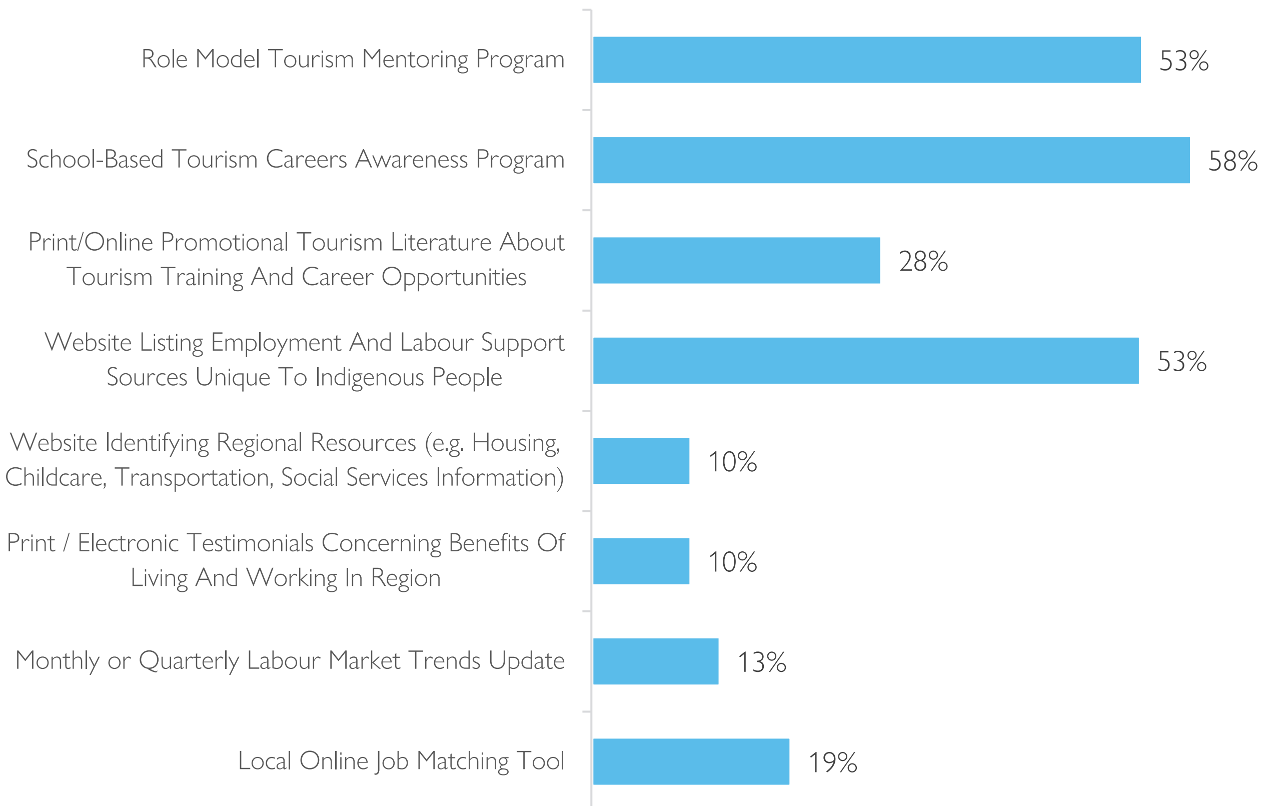
(% of Businesses)



Overall, did your tourism business have any challenges recruiting its required employee complement in 2019, n=39

Future Recruitment Tools to Attract Indigenous Employees

(% of Businesses Responding 'A Lot')

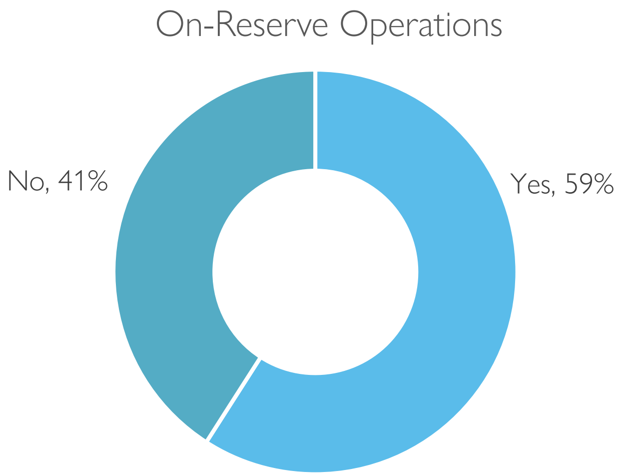


Over the next 5 years (2020/24, to what extend would the availability of the following recruitment tools help your company attract Indigenous employees? Not At All, Somewhat, A lot
n=31.

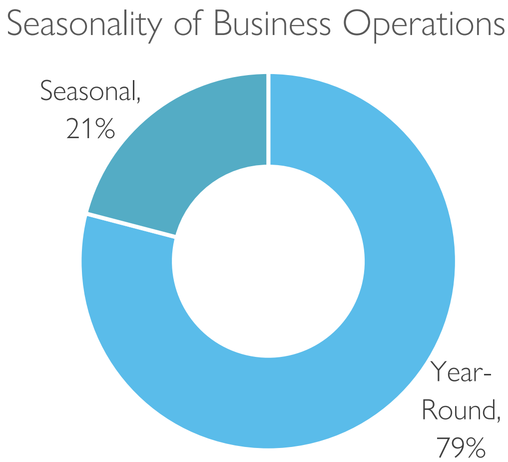
Retail and Food and Beverage

Business Profile

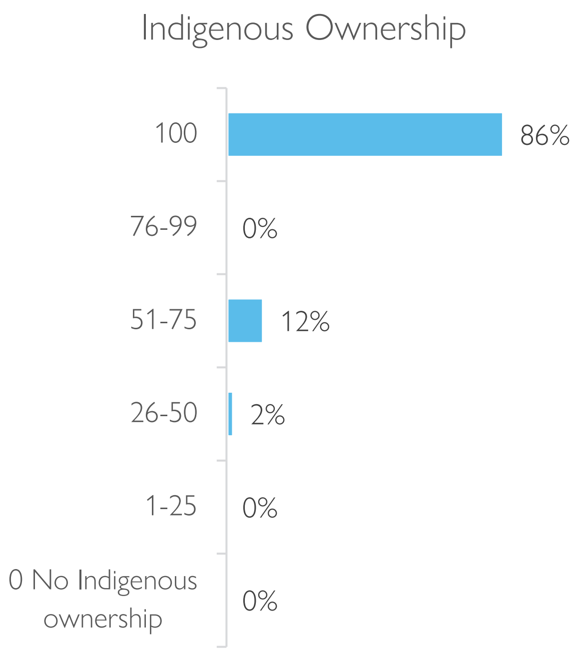
Exhibit 127: Retail and Food and Beverage – Indigenous Tourism Business Profile



Does your business primarily operate on-reserve? n=44



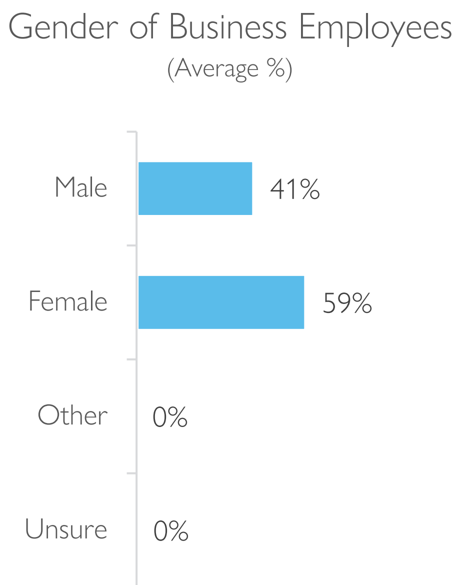
What months of the year does your business primarily operate? n=43



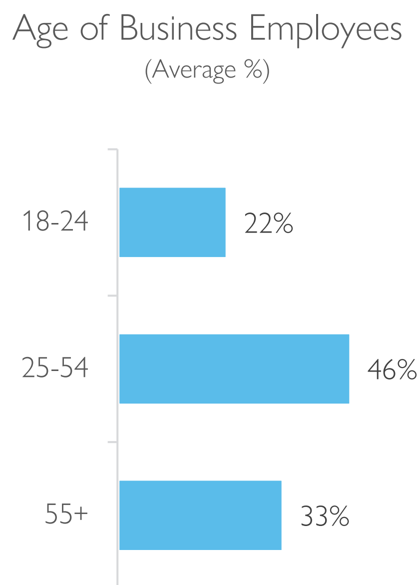
What percentage (%) of this tourism business is Indigenous owned? n=43

Employee Profile

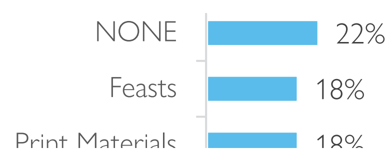
Exhibit 128: Retail and Food and Beverage – Indigenous Tourism Business Employee Profile

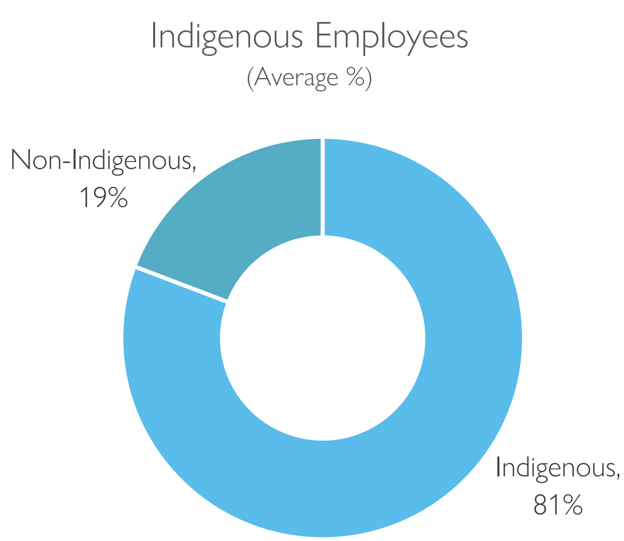


How many employees are typically male, female, other, unsure? n=36

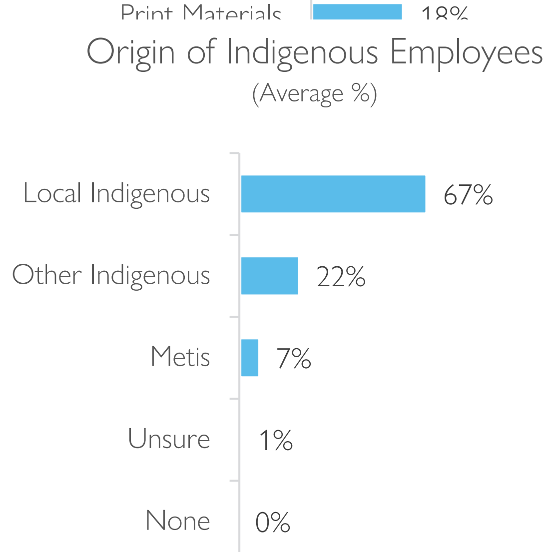


Overall, how many employees fall in the each of the following age categories? n=37





Overall, about how many or what percent of these employees were: n=34

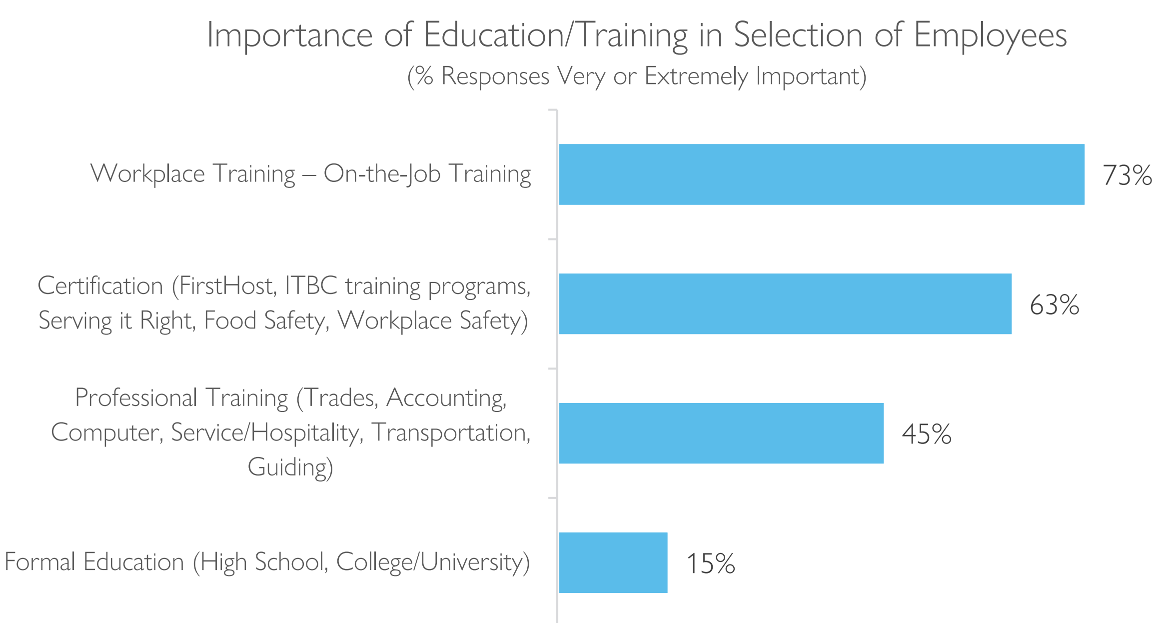


Overall, about how many or what % of the Indigenous personnel were? n=34

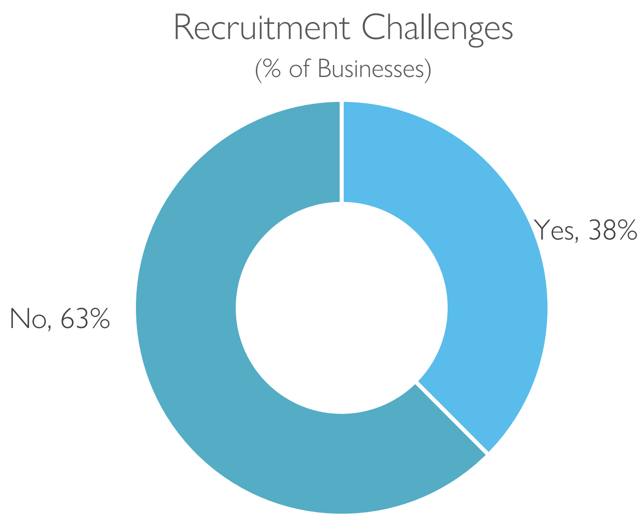
Skills and Recruitment

Exhibit 129: Retail and Food and Beverage – Indigenous Tourism Business Skills and Recruitment Profile

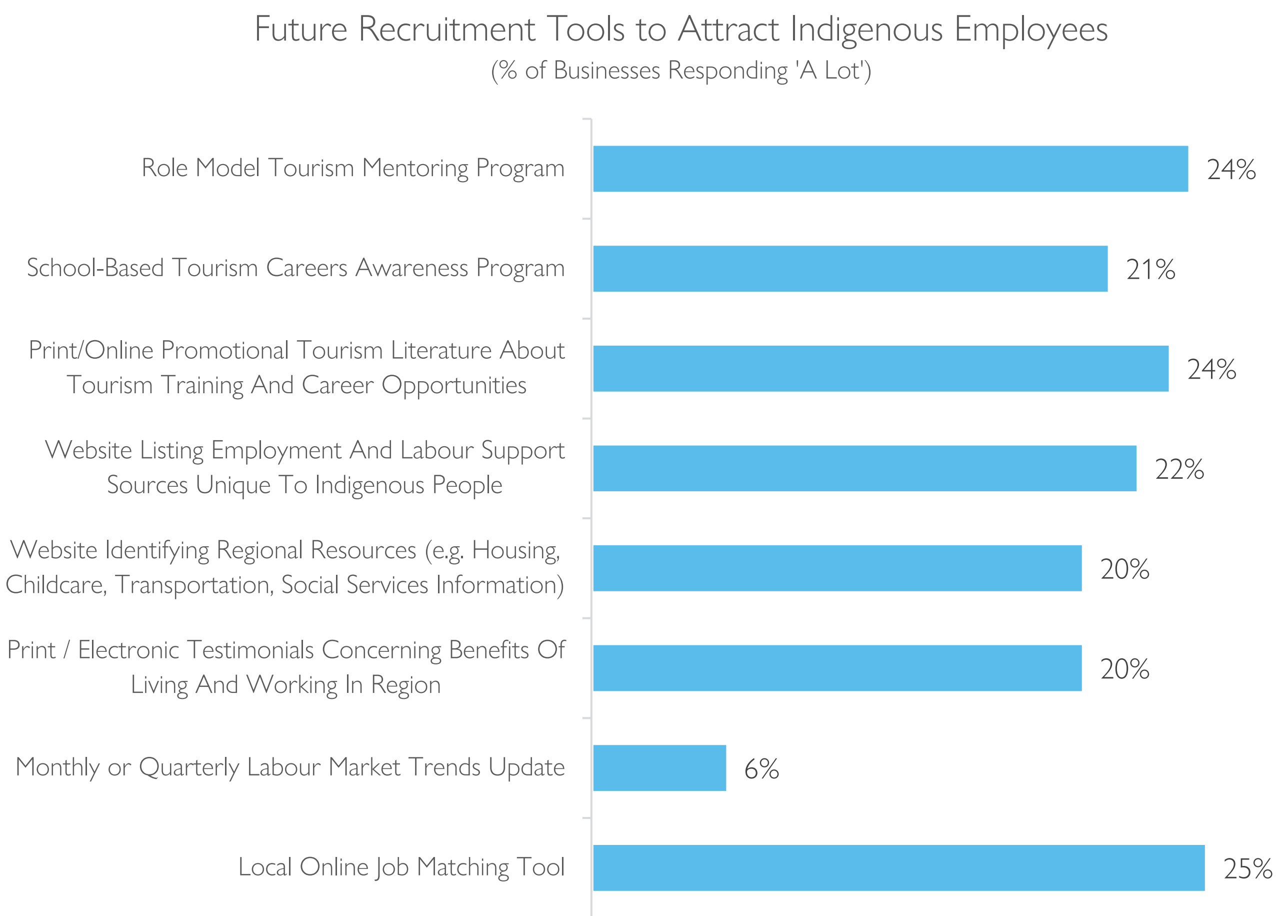
Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.
38 business responded with 114 responses.



How important were the presence of the following formal education/training qualifications in your typical selection of employees?
n=39



Overall, did your tourism business have any challenges recruiting its required employee complement in 2019, n=40

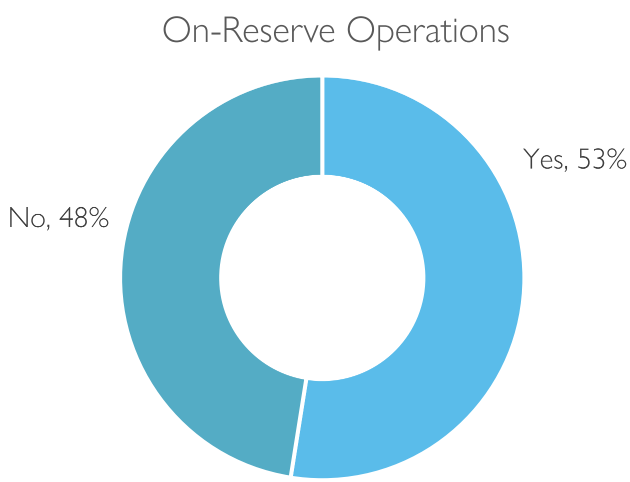


Over the next 5 years (2020/24, to what extend would the availability of the following recruitment tools help your company attract Indigenous employees? Not At All, Somewhat, A lot
n=36.

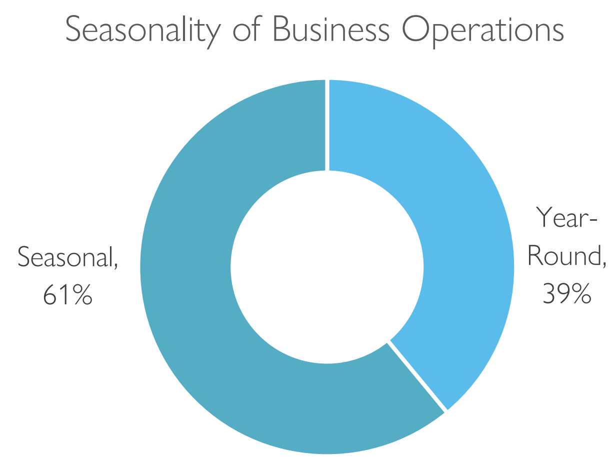
Outdoor Adventure and Attractions

Business Profile

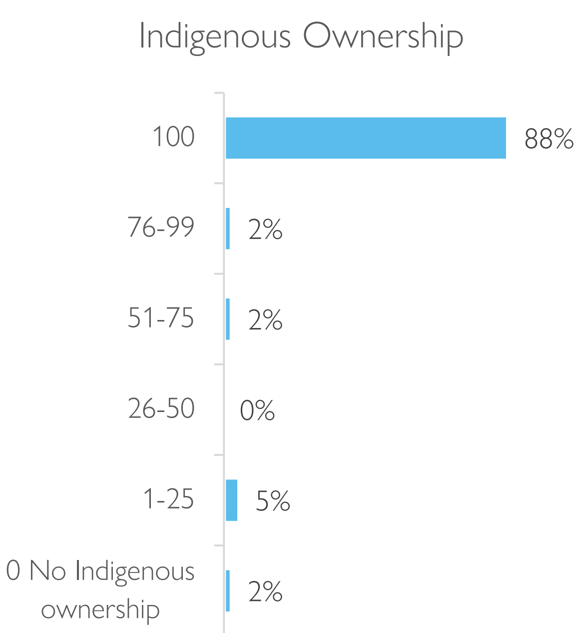
Exhibit 130: Outdoor Adventure and Attractions – Indigenous Tourism Business Profile



Does your business primarily operate on-reserve? n=40



What months of the year does your business primarily operate? n=41

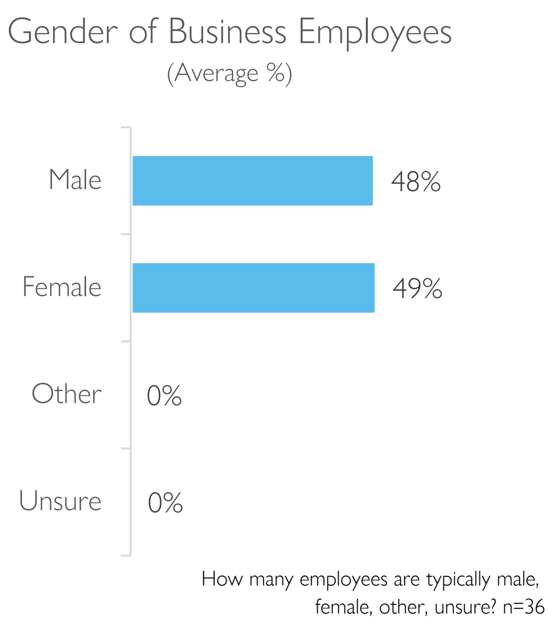


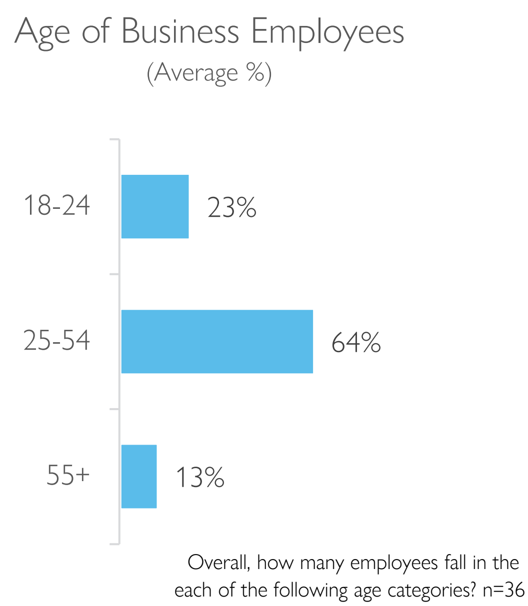
What percentage (%) of this tourism business is Indigenous owned? n=42

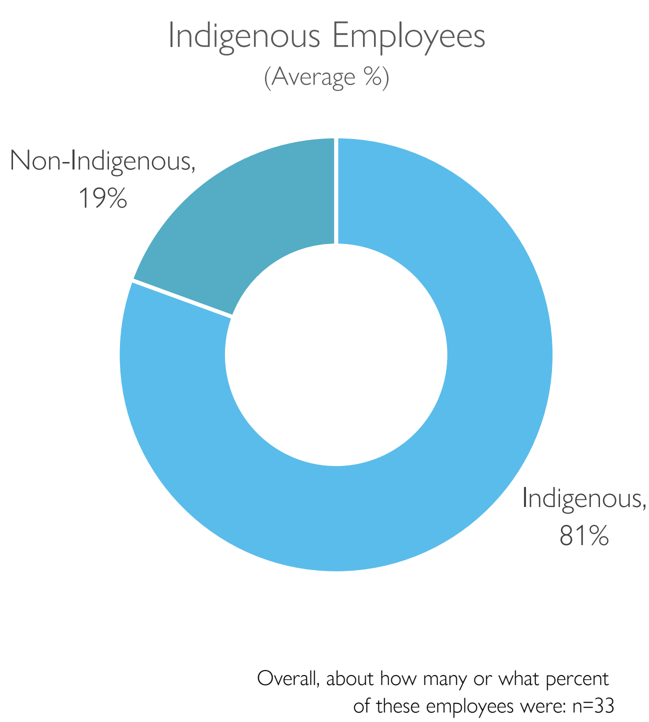
What Indigenous cultural features/activities characterize your tourism business? 46 businesses selected 199 cultural features.
Note: Businesses could select multiple months of operation therefore it is expected that percentages do not total 100%.

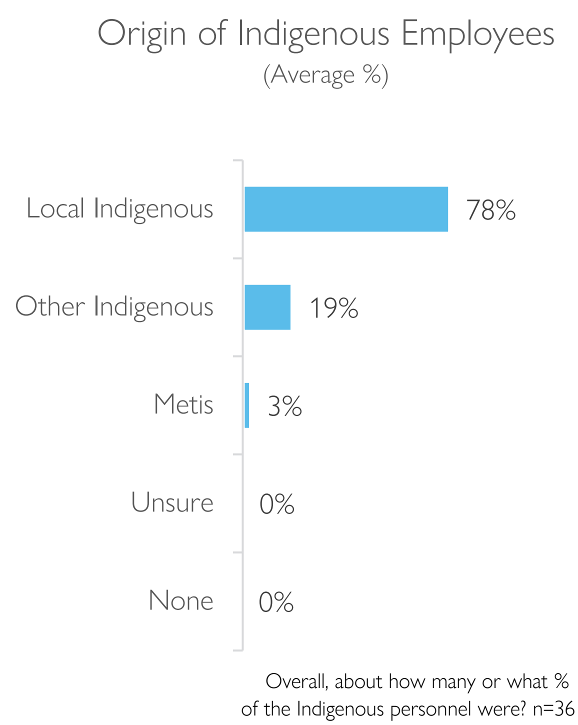
Employee Profile

Exhibit 131: Outdoor Adventure and Attractions – Indigenous Tourism Business Employee Profile



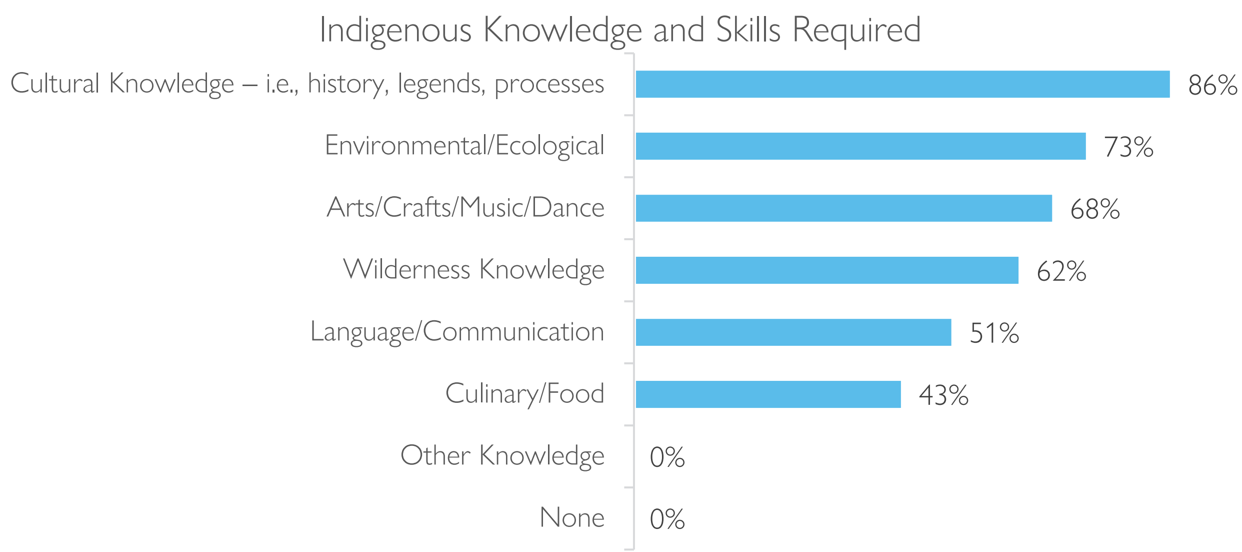




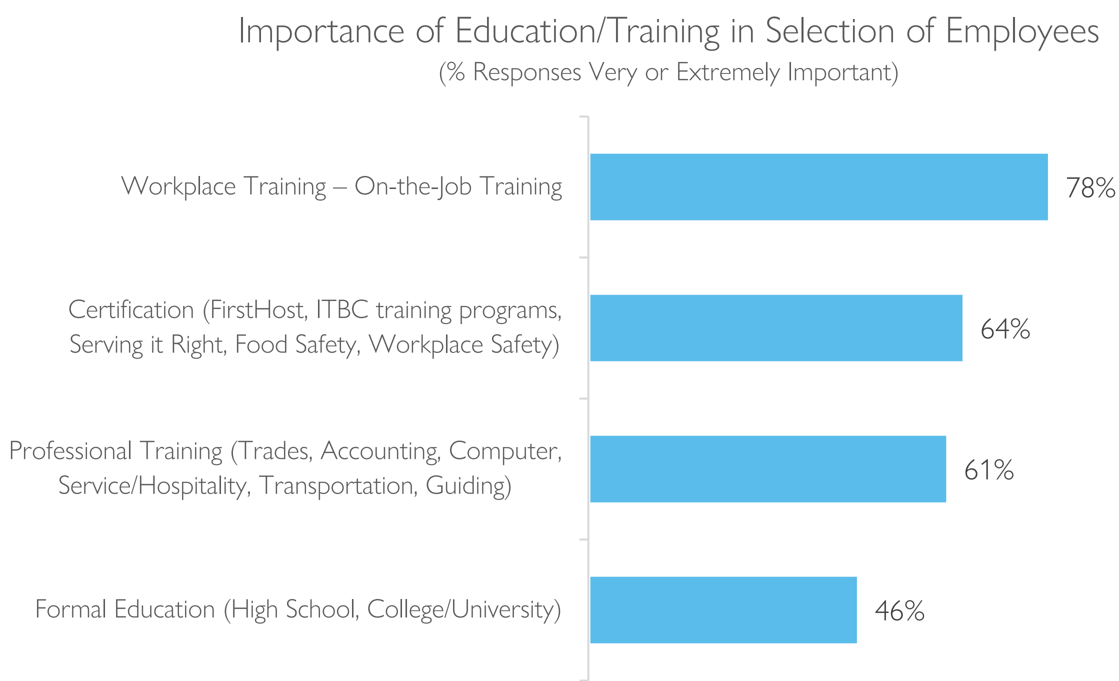


Skills and Recruitment

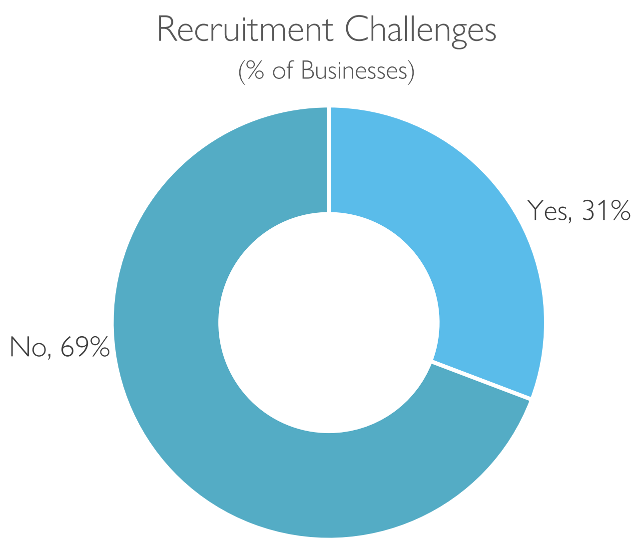
Exhibit 132: Outdoor Adventure and Attractions – Indigenous Tourism Business Skills and Recruitment Profile



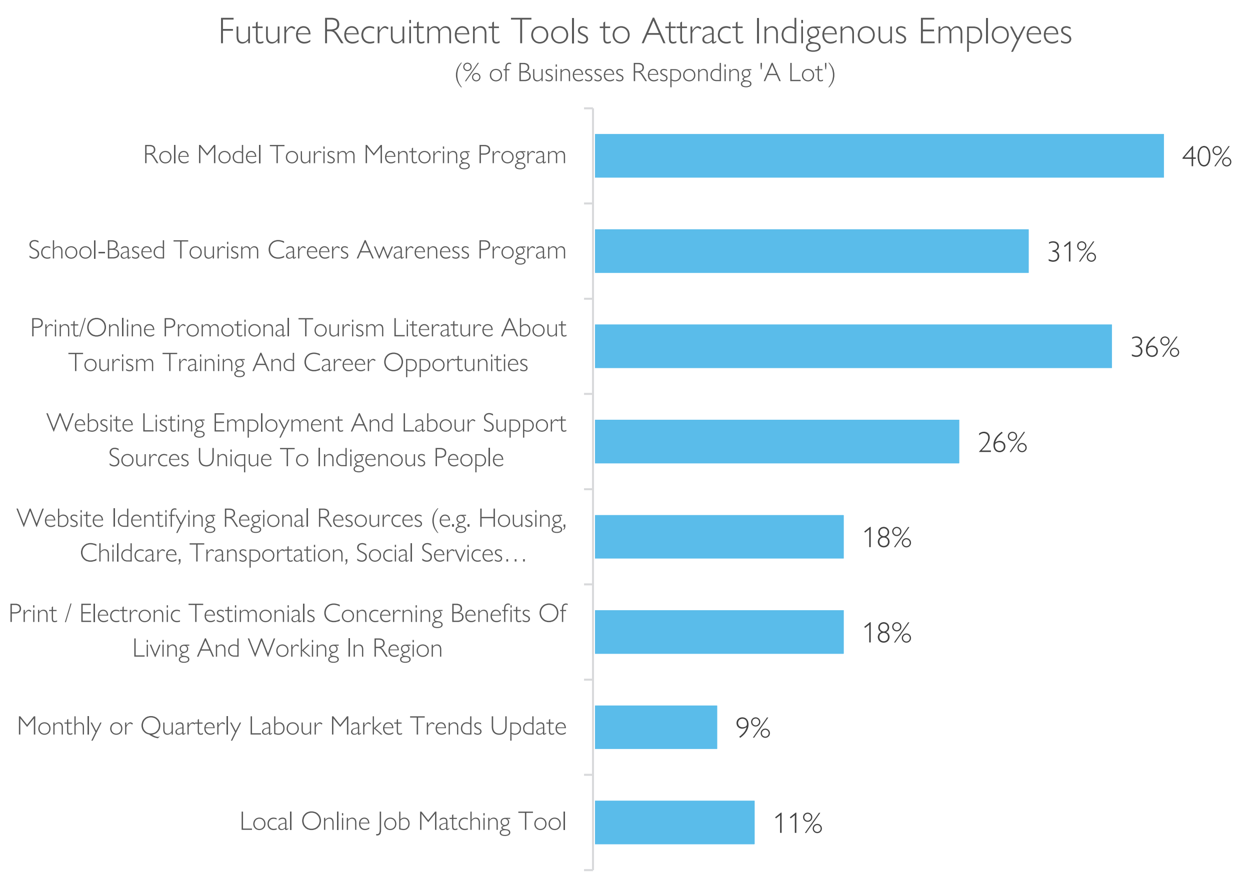
Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.
37 business responded with 142 responses.



How important were the presence of the following formal education/training qualifications in your typical selection of employees?
n=37



Overall, did your tourism business have any challenges recruiting its required employee complement in 2019, n=39



Over the next 5 years (2020/24, to what extend would the availability of the following recruitment tools help your company attract Indigenous employees? Not At All, Somewhat, A lot n=35.

APPENDIX D: SURVEY QUESTIONNAIRES

Indigenous Tourism Operator Employer Survey

Kla'how-ya,
Indigenous Tourism BC is conducting research that will help guide the development of the BC Indigenous Tourism Labour Force Strategy after the COVID-19 state of emergency. As the operator of an Indigenous tourism related business in BC, we invite you to share your ideas and expertise on this topic.

You can help us by taking about 25 minutes to complete the following survey on employment related opportunities and challenges. Most of the questions are multiple choice and require you simply check the appropriate box.

Your responses will be kept strictly confidential, and will only be reported in aggregate with those provided by many other tourism operators. Your answers will be solely used to help shape and promote future Indigenous employment opportunities in tourism and devise strategies to support Indigenous tourism post-COVID-19. (See the end of the survey for more detail on our commitment to protecting your confidentiality.)

More information on this project is available at https://www.Indigenousbc.com/corporate/ or email the project consultant.

This survey is an important part of a larger Indigenous Tourism BC (ITBC) labour force project funded by the BC Ministry of Advanced Education, Skills and Training. The project is conducted by Beverley O'Neil (Ktunaxa citizen) of O'Neil Marketing & Consulting along with her team.

<u>About Your Business</u>
This portion of the survey is about your primary tourism business. If you have more than one independently operated tourism business, please complete a separate survey for each of the others. Please answer all questions to the best of your knowledge. If you are unable to answer a specific question, please skip to the next.

What percentage (%) of this tourism business is Indigenous owned?

1. 100
2. 76-99
3. 51-75
4. 26-50
5. 1-25
6. 0 No Indigenous ownership

Does your business primarily operate on-reserve?

1. Yes
2. No

What are the location(s) of your business operation(s)?

	Town/City	Postal code
Primary location		
Location 2		
Location 3		
Location 4		
Location 5		

In which tourism business sector(s) do you primarily operate? (Please check appropriate business types)

- o Hotel or motel
- o Resort
- o Fishing lodge
- o Guest House / B&B
- o RV Park or campground
- o Indigenous traditional housing – i.e., teepee, kekuli, iskut
- o Other accommodations
- o Restaurant or café
- o Fine dining establishment
- o Fast food outlet
- o Other food & beverage
- o Guided tours (e.g., bus, charter)
- o Travel agencies – leisure
- o Travel agency – corporate
- o Tour operator / tour packager
- o Wildlife viewing
- o Guide / outfitter
- o Trail rides & horseback excursions
- o Boat tour
- o Fishing charter
- o Golf course/driving range
- o Other outdoor
- o Cultural or interpretive centre / site
- o Museum
- o Art gallery
- o Theatre
- o Fish hatchery tour
- o Other attraction
- o Airline
- o Marina
- o Water taxi
- o Other transportation
- o Indigenous tourism association
- o Information centre
- o Arts & crafts retail store
- o Other retail
- o Pow-wow
- o Cultural celebration
- o Feast
- o Conference & trade shows
- o Canoe races
- o Performances
- o Rodeos
- o Traditional games / competitions
- o Motor races
- o Other festival & event
- o Other / Not Listed: ___________

Which months of the year does your business primarily operate? (check all that apply)

1. Year-Round
2. January
3. February
4. March
5. April
6. May
7. June
8. July
9. August
10. September
11. October
12. November
13. December

What Indigenous cultural features / activities characterize your tourism business? (Check all that apply)

1. Guided tours
2. Self-guided tours
3. Story telling
4. Fishing / hunting
5. Pow-wow
6. Feasts
7. Food
8. Pre-recorded Indigenous cultural music
9. Print materials on the local culture
10. Arts & crafts demonstrations
11. Audio-visual presentations
12. Special programs for children
13. Displays & exhibits
14. Performances by: Dancers
15. Musicians
16. Lectures
17. Visitor orientation
18. Indigenous traditional dress
19. Indigenous décor / atmosphere
20. None
21. Other ___________
22. NA

<u>About Your Current Business Employment Patterns - best estimate for the last / 2019 season</u>

Please list the title and # of jobs provided by your business in 2019

	Job Title	# Employees	# Full-time (30+ hrs/wk)	# Part-time (
Position 1				
Position 2				
Position 3				
Position 4				
Position 5				
Position 6				
Position 7				
Position 8				
Position 9				
Position 10				

How many employees are typically:

	# of People
Male	
Female	
Other	
Unsure	

Overall, how many employees are typically in each the following age categories?

	# of people
up to 18 yrs	
18-24 yrs	
25-34 yrs	
35-44 yrs	
45-54 yrs	
55-64 yrs	
65+ yrs	
Unknown	

Overall, about how many or what % of these employees were:

	# of persons	or % of persons
Indigenous / Métis		
Non-Indigenous		
Unsure		

Overall, about how many or what % of the Indigenous personnel were:

	# of persons	or % Percent of persons
Local Indigenous (citizens of local First nations)		
Other Indigenous (not from local First Nations, status & non-status)		
Métis communities		
Unsure		
None		

Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions? (Check all that apply):

1. Cultural knowledge – i.e., history, legends, processes
2. Language / Communication
3. Environmental / ecological knowledge
4. Wilderness knowledge
5. Arts / Crafts / Music / Dance
6. Culinary / Foods knowledge
7. Other ___________

About Your Business Labour Management Patterns

Overall, did your tourism business have any challenges recruiting its required employee complement in 2019?

1. Yes
2. No

If you did have recruitment challenges in 2019, how many job positions were you unable to fill due to recruitment challenges? (enter whole number only, no letters)

If recruiting employees was challenging, what were the three most difficult positions to fill?

2nd Most Challenging
3rd Most Challenging

Overall, for the most challenging jobs to fill, what factors made recruiting appropriate personnel most difficult?

	Minimal	Somewhat	Very Challenging	N/A
Creating job awareness				
Having sufficient appropriate employee housing in the area				
Overcoming limited awareness of Indigenous cultural				
Having transportation available to / from the job				
Overcoming negative perception of tourism jobs/careers				
Establishing connections with labour sources (e.g. local First Nations Bands)				
Accessible local training / education				

Competing with other tourism employers				
Competing with other non-tourism employers				
Providing competitive job wages / salaries				
Finding employees with high school completion				
Finding employees with post-secondary completion				
Finding employees with cultural knowledge and/or language				

How important were the presence of following formal education / training qualifications in your typical selection of employees?

	Not important	Somewhat important	Very important	Extremely important
Formal Education – some high school, high school completion, some college / university, college / university completion				
Professional training – trades, accounting, computer, service / hospitality, transportation, guiding, etc.				
Workplace training – on-the-job training				
Certification – FirstHost, ITBC training programs, Serving it Right, Food Safety, Workplace Safety, others				

Please describe any on-the-job training your business offers.

To what extent do you use each of the following communication tools to recruit employees?

	Not At All	Somewhat Regularly	Regularly
On-line services – Indeed, Workopolis, LinkedIn, Charity Village, etc.			
Professional Assoc., Websites			
Social Media – Facebook, Twitter, other			
Family & friends			
Personal business connections & referrals			
Internal business connections – employees, colleagues, friends			
Indigenous Nation / Band - services, newsletter, website, education or employer officer			
Indigenous employment services agency (i.e., ISET)			
External recruitment organizations / agencies			
Print Media Advertising – newspapers, magazines			
Direct approaches by potential employees			
Non-Indigenous Government Employment Agency programs (e.g., BC or Canada, or specialized)			

Your Labour Requirements

In terms of # of positions, how much has your employee complement changed over the past 5 years, and expect it to change over the next 5 years? (If decreased place a "-" minus symbol in front. If there was no change over the previous year, enter "0" or leave blank.)

	2015
Full-time employees (30+ hrs/week)	
Part-time employees (	
Indigenous / Métis employees	
Foreign employees	

In terms of # of positions, how much has your employee complement changed over the past 5 years, and expect it to change over the next 5 years? (If decreased place a "-" minus symbol in front. If there was no change over the previous year, enter "0" or leave blank.)

	2017
Full-time employees (30+ hrs/week)	
Part-time employees (	
Indigenous / Métis employees	
Foreign employees	

In terms of # of positions, how much has your employee complement changed over the past 5 years, and expect it to change over the next 5 years? (If decreased place a "-" minus symbol in front. If there was no change over the previous year, enter "0" or leave blank.)

	2019
Full-time employees (30+ hrs/week)	
Part-time employees (	
Indigenous / Métis employees	
Foreign employees	

In terms of # of positions, how much has your employee complement changed over the past 5 years, and expect it to change over the next 5 years? (If decreased place a "-" minus symbol in front. If there was no change over the previous year, enter "0" or leave blank.)

	2020 / Current Covid
Full-time employees (30+ hrs/week)	
Part-time employees (	
Indigenous / Métis employees	
Foreign employees	

In terms of # of positions, how much has your employee complement changed over the past 5 years, and expect it to change over the next 5 years? (If decreased place a "-" minus symbol in front. If there was no change over the previous year, enter "0" or leave blank.)

	2022
Full-time employees (30+ hrs/week)	
Part-time employees (	

Indigenous / Métis employees	
Foreign employees	

In terms of # of positions, how much has your employee complement changed over the past 5 years, and expect it to change over the next 5 years? (If decreased place a "-" minus symbol in front. If there was no change over the previous year, enter "0" or leave blank.)

	2024
Full-time employees (30+ hrs/week)	
Part-time employees (	
Indigenous / Métis employees	
Foreign employees	

Do you expect to be able to reopen your business after COVID-19 state of emergency lock down has been lifted?

1. Yes - this year if in fall
2. Yes - but next year
3. No - am closing business
4. Unknown at this time

Over the next 5 years (2020-2024), to what extent do you anticipate the demand for the following types of employee positions in your business to change? Indicate the number of jobs per category and year.

	2020 / Covid	2022	2024
Management / Supervisory			
Professional / Technical			
Administrative Support			
Skilled / Semi-skilled Trades / Apprenticeable Trades			
Labour / Unskilled - front-line customer service, other			
Indigenous Culture – knowledge, skills, language			

Over the next 5 years (2020-2024), to what extent would the availability of the following recruitment tools help your company attract Indigenous employees.

	Not at all	Somewhat	A lot
Local online job matching tool			
School-based tourism careers awareness program			
Role model tourism mentoring program			
Monthly or quarterly labour market trends update			
Website listing employment and labour support sources unique to Indigenous people			
Website identifying regional resources (e.g., housing, childcare, transportation, social services information for potential employees)			
Print / electronic testimonials concerning benefits of living and working in region			

Print / on-line promotional tourism literature about tourism training and career opportunities			

Considering the effects of the COVID-19 on your tourism business, what types of supports do you require to be able to keep operations going or re-open -- i.e., financial for operations or staffing, marketing, human resources, and training, labour support, other?

Foreign / International Workers

Over the past 5 years (2015-2019), how many job positions has your tourism business used the Temporary Foreign Workers program to fill?

If your business has not used the Temporary Foreign Workers Program in the past to help meet its employment needs, please suggest why?

What is the main reason you support or oppose the Temporary Foreign Worker Program?

What international recruitment program has your business used? (check all that apply)

1. Working Holiday Visa
2. Provincial Nominee program
3. Work Permit for International Student
4. Canadian Experience Class
5. Federal Skills Worker program
6. Federal Skilled Trades program
7. None
8. Other program – please specify what program

Thank You, Comments

Any other comments or Ideas to help recruit or retain Indigenous and other employees?

Indigenous Festivals and Events Survey

Kla'how-ya,
Indigenous Tourism BC is conducting research that will help guide the development of the BC Indigenous Tourism Labour Force Strategy after the COVID-19 state of emergency. This is the second Indigenous operators survey in the series of understanding the current situation and needs. This survey focuses on Festivals and Events.

You can help us by taking about 5-8 minutes to complete the following survey on employment related opportunities and challenges.

Your responses will be kept strictly confidential, and will only be reported in aggregate with those provided by many other tourism operators. Your answers will be solely used to help shape and promote future Indigenous employment opportunities in tourism and devise strategies to support Indigenous tourism experiences post-COVID-19. (See the end of the survey for more detail on our commitment to protecting your confidentiality.)

More information on this project is available at https://www.Indigenousbc.com/corporate/ or email the project consultant.

This survey is an important part of a larger Indigenous Tourism BC (ITBC) labour force project funded by the BC Ministry of Advanced Education, Skills and Training. The project is conducted by Beverley O'Neil (Ktunaxa citizen) of O'Neil Marketing & Consulting along with her team.

<u>About Your Event(s)</u>
Organization Name or Contact

Event Name(s) and Public Status

	Event Name	When typically held	# days	Public Status Public, Private, Unknown	Location	Postal Code	On-Reserve yes/no/unsure
Event 1							
Event 2							
Event 3							

What percentage (%) of this festival & event / tourism business is Indigenous controlled/organized/owned?

1. 100
2. 76-99
3. 51-75
4. 26-50
5. 1-25
6. 0 No Indigenous ownership

In which tourism business sector(s) do you primarily operate? (Please check appropriate business types)

- Hotel or motel
- Resort
- Fishing lodge
- Guest House / B&B
- RV Park or campground
- Indigenous traditional housing – i.e., teepee, kekuli, iskut
- Other accommodations
- Restaurant or café
- Fine dining establishment
- Fast food outlet
- Other food & beverage
- Guided tours (e.g., bus, charter)
- Travel agencies – leisure
- Travel agency – corporate
- Tour operator / tour packager
- Wildlife viewing
- Guide / outfitter
- Trail rides & horseback excursions
- Boat tour
- Fishing charter
- Golf course/driving range
- Other outdoor
- Cultural or interpretive centre / site
- Museum
- Art gallery
- Theatre
- Fish hatchery tour
- Other attraction
- Airline
- Marina
- Water taxi
- Other transportation
- Indigenous tourism association
- Information centre
- Arts & crafts retail store
- Other retail
- Pow-wow
- Cultural celebration
- Feast
- Conference & trade shows
- Canoe races
- Performances
- Rodeos
- Traditional games / competitions
- Motor races
- Other festival & event
- Other / Not Listed: ___________

Which months are your event(s) typically held? / Which months of the year does your business primarily operate? (check all that apply)

1. Year-Round
2. January
3. February
4. March
5. April
6. May
7. June
8. July
9. August
10. September
11. October
12. November
13. December

What does the event typically offer (i.e., food and craft/retail sales)? (What Indigenous cultural features / activities characterize your tourism business?) Check all that apply

1. Guided tours
2. Self-guided tours
3. Story telling
4. Fishing / hunting
5. Pow-wow
6. Feasts
7. Food (Indigenous cultural)
8. Pre-recorded Indigenous cultural music
9. Print materials on the local culture
10. Arts & crafts demonstrations
11. Audio-visual presentations
12. Special programs for children
13. Displays & exhibits
14. Performances by: Dancers
15. Musicians
16. Lectures
17. Visitor orientation
18. Indigenous traditional dress
19. Indigenous décor / atmosphere
20. None
21. Other ___________
22. NA

About Your Current Business Employment Patterns - best estimate for the last / 2019 season

Please list the title and # of jobs and volunteers provided by your event typically in recent years (i.e., coordination, planning, security, tickets, Elders for prayers, performers/entertainers). If the position is part of a Band or other organizations full-time employee job, then this is a part-time paid employee.

	Job Title	PRIOR EVENT - # Paid Full-time (30+ hrs/wk)	PRIOR EVENT - # Months working full-time	PRIOR EVENT - # Paid Part-time (	PRIOR EVENT - # Months working part-time	PRIOR EVENT - # Unpaid / Volunteer	DURING EVENT - # Paid	DURING EVENT - # Unpaid / Volunteer
Position 1								
Position 2								
Position 3								
Position 4								
Position 5								
Position 6								
Position 7								
Position 8								
Position 9								
Position 10								

Overall, about how many or what % of these employees were:

	# of persons	or % of persons
Indigenous / Métis		
Non-Indigenous		
Unsure		

Overall, about how many or what % of the Indigenous personnel were:

	# of persons	or % Percent of persons
Local Indigenous (citizens of local First Nations)		
Other Indigenous (not from local First Nations, status & non-status)		
Métis communities		
Unsure		
None		

Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions? (Check all that apply):

1. Cultural knowledge – i.e., history, legends, processes
2. Language / Communication
3. Environmental / ecological knowledge
4. Wilderness knowledge
5. Arts / Crafts / Music / Dance
6. Culinary / Foods knowledge
7. Other ___________

Do you expect you will be able to host your event again? (Do you expect you will be able to reopen your business after COVID-19 state of emergency lock down has been lifted?)

1. Yes - this year if in fall
2. Yes - but next year
3. No - am closing business
4. Unknown at this time

Thank You, Comments

Any other comments - temp foreign worker, challenges, how do you recruit, expansion ideas, how can ITBC help? COVID-19 supports needed? -- i.e., financial for operations or staffing, marketing, human resources, and training, labour support, other?

Indigenous Gas Stations Survey

Kla'how-ya,
Indigenous Tourism BC is conducting research that will help guide the development of the BC Indigenous Tourism Labour Force Strategy after the COVID-19 state of emergency. This is the second Indigenous operators survey in the series of understanding the current situation and needs. This survey focuses on Indigenous owned GAS STATIONS.

You can help us by taking about 5-8 minutes to complete the following survey on employment related opportunities and challenges.

Your responses will be kept strictly confidential, and will only be reported in aggregate with those provided by many other tourism operators. Your answers will be solely used to help shape and promote future Indigenous employment opportunities in tourism and devise strategies to support Indigenous tourism experiences post-COVID-19. (See the end of the survey for more detail on our commitment to protecting your confidentiality.)

More information on this project is available at https://www.Indigenousbc.com/corporate/ or email the project consultant.

This survey is an important part of a larger Indigenous Tourism BC (ITBC) labour force project funded by the BC Ministry of Advanced Education, Skills and Training. The project is conducted by Beverley O'Neil (Ktunaxa citizen) of O'Neil Marketing & Consulting along with her team.

About Your Business

Business Name

What percentage (%) of this gas station is Indigenous controlled/organized/owned?

1. 100
2. 76-99
3. 51-75
4. 26-50
5. 1-25
6. 0 No Indigenous ownership

Where is this business location(s)?

	Town/City	Postal code
Primary location		
Location 2		
Location 3		
Location 4		
Location 5		

Is your / are these business(es) primarily located on-reserve?

1. Yes
2. No

In which tourism business sector(s) do you primarily operate? (Please check appropriate business types)

1. Hotel or motel
2. Resort
3. Fishing lodge
4. Guest House / B&B
5. RV Park or campground
6. Indigenous traditional housing – i.e., teepee, kekuli, iskut
7. Other accommodations
8. Restaurant or café
9. Fine dining establishment
10. Fast food outlet
11. Other food & beverage
12. Guided tours (e.g., bus, charter)
13. Travel agencies – leisure
14. Travel agency – corporate
15. Tour operator / tour packager
16. Wildlife viewing
17. Guide / outfitter
18. Trail rides & horseback excursions
19. Boat tour
20. Fishing charter
21. Golf course/driving range
22. Other outdoor
23. Cultural or interpretive centre / site
24. Museum
25. Art gallery
26. Theatre
27. Fish hatchery tour
28. Other attraction
29. Airline
30. Marina
31. Water taxi
32. Other transportation
33. Indigenous tourism association
34. Information centre
35. Gas Station
36. Convenience Store
37. Arts & crafts retail store
38. Other retail
39. Pow-wow
40. Cultural celebration
41. Feast
42. Conference & trade shows
43. Canoe races
44. Performances
45. Rodeos
46. Traditional games / competitions
47. Motor races
48. Other festival & event
49. Other / Not Listed: ___________

How many pumps does your gas station have?

Which months of the year does your business typically operate (when not in Covid)? Check all that apply

1. Year-Round
2. January
3. February
4. March
5. April
6. May
7. June
8. July
9. August
10. September
11. October
12. November
13. December

Please list the title and # of jobs for Year-Round and Seasonal Workers

	Job Title	YR ROUND - # Full-time (30+ hrs/wk)	YR ROUND - # Part-time (<30 hrs/wk)	SEASONAL - # Full-time (30+ hrs/wk)	SEASONAL - # Part-time (<30 hrs/wk)	SEASONAL - # Months
Position 1						
Position 2						
Position 3						
Position 4						
Position 5						
Position 6						
Position 7						
Position 8						
Position 9						
Position 10						

Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions? (Check all that apply):

1. Cultural knowledge – i.e., history, legends, processes
2. Language / Communication
3. Environmental / ecological knowledge
4. Wilderness knowledge
5. Arts / Crafts / Music / Dance
6. Culinary / Foods knowledge
7. Other ___________
8. None

Overall, about how many or what % of these employees were:

	# of persons	or % of persons
Indigenous / Métis		
Non-Indigenous		
Unsure		

Overall, about how many or what % of the Indigenous personnel were:

	# of persons	or % Percent of persons
Local Indigenous (citizens of local First Nations)		
Other Indigenous (not from local First Nations, status & non-status)		
Métis communities		
Unsure		
None		

Cultural Experiences Offered

What Indigenous cultural related experience has your gas station included in its operation? Check all that apply.

1. Guided tours
2. Self-guided tours
3. Story telling
4. Fishing / hunting
5. Pow-wow
6. Feasts
7. Food (Indigenous cultural)
8. Pre-recorded Indigenous cultural music
9. Print materials on the local culture
10. Arts & crafts demonstrations
11. Audio-visual presentations
12. Special programs for children
13. Displays & exhibits
14. Performances by: Dancers
15. Musicians
16. Lectures
17. Visitor orientation
18. Indigenous traditional dress
19. Indigenous décor / atmosphere
20. None
21. Other ___________

What was the impact of COVID-19 on your business operations?

	Increased	Same / No Change	Reduced	Temporary Closed / Laid off	Closed/ All Dismissed
Operating hours [Text]					
Staffing [Text]					

Thank You, Comments

Any other comments - temp foreign worker, challenges, how do you recruit, expansion ideas, how can ITBC help? COVID-19 supports needed? -- i.e., financial for operations or staffing, marketing, human resources, and training, labour support, other?

Non-Indigenous Tourism Operator Survey

Kla'how-ya,

Indigenous Tourism BC is conducting research that will help guide the development of an important Indigenous Tourism Labour Force Strategy for British Columbia during and post-COVID-19 19.

*We are seeking the ideas and expertise of operators of non-Indigenous tourism related businesses in BC on how best to prepare, recruit and retain Indigenous employees for your region's tourism operations over the next five years. Please help by taking about 10 minutes to complete the following survey on Indigenous employment opportunities and challenges. Most of the survey questions require simply checking the boxes that best match with your answers. A few ask for your viewpoint on other employment factors that you may wish to share your perspectives.

Your responses will be kept strictly confidential, and will only be reported in aggregate with those provided by many other tourism operators. The information you and other respondents provide will be solely used to help increase Indigenous employment opportunities in BC's tourism businesses. See the end of the survey for more detail on our commitment to protecting your confidentiality.

This survey is an important part of a larger Indigenous Tourism BC (ITBC) labour force project funded by the BC Ministry of Advanced Education, Skills and Training. This project is an Indigenous Tourism BC (ITBC) project funded by the BC Ministry of Advanced Education, Skills and Training.

About Your Business

Q1. What is the primary location of your business operation?

	Town/City	Postal Code
Primary location		

Q2. In which tourism business sector do you primarily operate? Please check one - the most appropriate business type *Primary business type is the sector that your business generates its greatest business and is best known for. For example a museum with gift shop would be a museum.

1. Hotel or motel
2. Resort
3. Fishing lodge
4. Guest House / B&B
5. RV Park or campground
6. Indigenous traditional housing – i.e., teepee, kekuli, iskut
7. Other accommodations
8. Restaurant or café
9. Fine dining establishment
10. Fast food outlet
11. Other food & beverage
12. Guided tours (e.g., bus, charter)
13. Travel agencies – leisure
14. Travel agency – corporate
15. Tour operator / tour packager
16. Wildlife viewing
17. Guide / outfitter
18. Trail rides & horseback excursions
19. Boat tour
20. Fishing charter
21. Golf course/driving range
22. Other outdoor
23. Cultural or interpretive centre / site
24. Museum
25. Art gallery
26. Theatre
27. Fish hatchery tour
28. Other attraction
29. Airline
30. Marina
31. Water taxi
32. Other transportation
33. Indigenous tourism association
34. Information centre
35. Arts & crafts retail store
36. Other retail
37. Pow-wow
38. Cultural celebration
39. Feast
40. Conference & trade shows
41. Canoe races
42. Performances
43. Rodeos
44. Traditional games / competitions
45. Motor races
46. Other festival & event
47. Other / Not Listed: ___________

Q3. What percentage (%) of this tourism business is Indigenous owned?

1. 100
2. 76-99
3. 51-75
4. 26-50
5. 1-25
6. 0 No Indigenous ownership

Q4. Does your business primarily operate on an Indian reserve?

1. Yes
2. No

Q5. During the 2020 COVID-19 lock down (starting March 18, 2020 to now), to what level of full employment capacity has your tourism business operated? (Select the percentage range)

1. 100%
2. 75-99%
3. 50-74%
4. 25-49%
5. 1-28%
6. Not at all

Q6. During the past five years and prior to COVID-19, had your tourism business hired any Indigenous (status, non-status, Métis) employees? (Check appropriate box)

1. Yes
2. No (skip to Q7)
3. Unknown (skip to Q7)

If Yes, in what positions did your business employ them? (Check all that apply).

1. Jobs that highlight Indigenous culture
2. Management / Supervisory
3. Professional / Technical
4. Administrative Support
5. Skilled / Semi-skilled Trades / Apprentice Trades
6. Labour / Unskilled - front-line customer service, other

Q7. To what extent is your business likely to employ Indigenous workers - new or existing hires - over the next 5 years (2021-2025)? (check one)

1. Very likely
2. Somewhat likely
3. Not likely
4. N/A

If somewhat or very likely to hire, Indigenous employees, in what positions would you anticipate them working? (Check all that apply)

1. Jobs that highlight Indigenous culture
2. Management / Supervisory
3. Professional / Technical
4. Administrative Support
5. Skilled / Semi-skilled Trades / Apprentice Trades
6. Labour / Unskilled - front-line customer service, other
7. Not likely

Q8. If your business is somewhat or very likely to recruit Indigenous employees at some point over the next five years, what would be the three most significant challenges to doing so?

2nd Most Challenging

3rd Most Challenging

Q9. What are the main reasons your tourism business is somewhat / very likely or not likely to hire Indigenous employees over the next 5 years? (Please provide your reasons in the space provided below)

Q10. What factors make recruiting personnel most difficult? AND indicate if the factor is uniquely Indigenous/Métis employee related.

	Level of Challenge	Level of Challenge	Level of Challenge
Creating job awareness			
Having sufficient appropriate employee housing in the area			
Overcoming limited awareness of Indigenous culture			
Having transportation available to/from the job			
Overcoming negative perception of tourism jobs/careers			
Establishing connections with labour sources (e.g. local First Nations Bands)			
Accessible local training/education			
Competing with other tourism employers			
Competing with other non-tourism employers			
Providing competitive job wages/salaries			
Finding employees with high school completion			
Finding employees with post-secondary completion			
Finding employees with cultural knowledge and/or language			

Q10. What factors make recruiting personnel most difficult? AND indicate if the factor is uniquely Indigenous/Métis employee related.

	Uniquely Indigenous/Métis	Uniquely Indigenous/Métis	Uniquely Indigenous/Métis
Creating job awareness			
Having sufficient appropriate employee housing in the area			
Overcoming limited awareness of Indigenous culture			
Having transportation available to/from the job			
Overcoming negative perception of tourism jobs/careers			
Establishing connections with labour sources (e.g. local First Nations Bands)			
Accessible local training/education			
Competing with other tourism employers			
Competing with other non-tourism employers			
Providing competitive job wages/salaries			
Finding employees with high school completion			

	Uniquely Indigenous/Métis	Uniquely Indigenous/Métis	Uniquely Indigenous/Métis
Finding employees with post-secondary completion			
Finding employees with cultural knowledge and/or language			

Q11. How important were the presence of the following formal education / training qualifications in your typical selection of employees?

	Not important	Somewhat important	Very important	Extremely important
Formal Education – some high school, high school completion, some college / university, college / university completion				
Professional training – trades, accounting, computer, service / hospitality, transportation, guiding, etc.				
Workplace training – on-the-job training				
Certification – SuperHost/FirstHost, industry training programs, Serving it Right, Food Safety, Workplace Safety, WHMIS, others				

Q12. Which of the following tools would be helpful in addressing any of these recruitment challenges? (Check only the most helpful tools)

1. On-line job search services (e.g., Indeed, Workopolis, LinkedIn, Charity Village, etc.) with current local content
2. School–based tourism careers awareness and mentoring program for Indigenous and non-Indigenous students
3. Workplace tourism skills and career development mentoring program
4. Indigenous employment services agency (i.e., ISET)
5. Employment and labor support website unique to Indigenous people
6. Website identifying regional support resources (e.g., housing, childcare, transportation, social services) for tourism employees.
7. On-the-job certification programs – SuperHost/FirstHost, ITBC training programs, Serving it Right, Food Safety, WHMIS, Workplace Safety
8. Print/On-line promotional information on COVID-19 safety procedures used to protect employees and visitors
9. On-line professional development training programs – trades, accounting, computer, service/ hospitality, transportation, guiding, etc.

Q13. What international worker recruitment program has your business used? (check all that apply)

1. Temporary Foreign Workers Program
2. Working Holiday Visa
3. Provincial Nominee program
4. Work Permit for International Student
5. Canadian Experience Class
6. Federal Skills Worker program
7. Federal Skilled Trades program
8. None - skip to final comments
9. Other program – please specify what program ___________

If you have used any, would you consider hiring Indigenous people for these positions? Please explain reasons.

Thank You, Comments

Q14. What other strategies can you share for recruiting tourism employees in general, and Indigenous employee hiring issues in particular? (Please provide your suggestions in the space provided below)

APPENDIX E: PROVINCIAL FORUMS QUESTIONNAIRE AND POLLING

Zoom Sessions – Post-Event Questionnaire

Thank you for attending the Indigenous Tourism BC Labour Research Project - Provincial Zoom Sessions held on November 25, 26 and December 1, 2.

Following up from these sessions, please provide your ideas on a few themes covered in the discussions. These comments will inform the research report and Smart Practices Guide, as well as the strategic plan.

Which ITBC Labour Research Zoom sessions did you attend? (check all that apply)

- ❑ #1-Nov 25-Overcoming Challenges
- ❑ #2-Nov 26-Current State
- ❑ #3-Dec 1-Smart Practices
- ❑ #4-Dec 2-Future of Labour

1) What jobs are needed in the future?
2) What skills are needed in the future?
3) How can one build capacity and train employees?
4) Share recommendations on supports and methods for recruitment and retention of Indigenous employees.
5) How can Indigenous culture be included in the workplace – i.e., in training, recruitment, employment?
6) Any smart practices you'd like to share for the Smart Practices Guide?

Other Comments and Ideas

Provincial Forum Zoom Sessions – Event Polling Questions

During each of the four provincial zoom sessions, there were close-ended polling questions. Participants were invited to respond immediately, then after each question polling closed, responses were immediately displayed.

Session #1 – Nov 25 - Overcoming Indigenous Tourism Labour Challenges and Advancing Indigenous People

What tourism region do you live in or represent? (select one)

Response	#	%
Cariboo Chilcotin Coast	5	19%
Kootenay Rockies	1	4%
Northern BC	4	15%
Thompson Okanagan	0	0%
Vancouver Coast and Mountains	5	19%
Vancouver Island	10	37%
BC	2	7%
Don't know	0	0%
Total	27	100%

Which of these identified challenges do you feel are the top 2 barriers to attracting and retaining Indigenous labour? (Check 2)

Response	#	%
Adequate resources for training or education	10	29%
Physical / location barriers	8	24%
Lack of training program	4	12%
Lack of transportation	0	0%
Lack of Childcare	3	9%
Inability to offer competitive wages	4	12%
Lack of housing	5	15%
Poor tourism industry reputation	2	6%
Total	34	100%

Which positions are the hardest to fill with Indigenous labour? (pick 3)

Response	#	%
Outdoor Sport and Recreational Guides	14	17%
Cooks	4	5%
Musicians and Singers	1	1%
Bus Drivers, Subway Operators and Other Transit Operators	6	7%
Light Duty Cleaners / housekeeping	6	7%
Hotel Front Desk Clerks / Retail Salesperson	8	10%
Chefs	9	11%
Food and Beverage Servers	4	5%
Management	21	26%
Other	8	10%
Total	81	100%

Session #2 – Nov 26 – Culture and Indigenous People and Nations in Tourism

Do you feel you will be working in tourism in 2021?

Response	#	%
Yes	21	91%
No	0	0%
Not presently working directly in tourism	2	9%
Don't know	0	0%
Total	23	100%

By 2024, do you feel you will be back at or stronger than you were in 2019?

Response	#	%
Stronger	25	96%
Same	0	0%
Weaker	0	0%
May not be open	1	4%
Unknown	0	0%
Total	26	100%

By the end of 2021, how do you feel Indigenous tourism businesses will fare in comparison to non-Indigenous tourism operators?

Response	#	%
Much Better	10	38%
Better	15	58%
Same	2	8%
Not as good	0	0%
No idea	1	4%
Total	28	108%

Session #3 – Dec 1 – Indigenous & Tourism Labour Smart Practices

How important is a human resources strategy in your organization?

Response	#	%
Very important	25	68%
Somewhat important	5	14%
Important	7	19%
Somewhat unimportant	0	0%
Very unimportant	0	0%
Don't have one	0	0%
Total	37	100%

What are the top 3 employer challenges you'd like to learn smart practices for?

Response	#	%
Setting competitive job wages / salaries	12	12%
Solving the housing shortage	10	10%
Providing transportation to/from work	8	8%
Supporting acquiring Driver's licence	9	9%
Finding Employees with post-secondary completion	3	3%
Getting Indigenous people into management	23	22%
Setting the right Band commitment to hiring membership	5	5%
Facilitating access to local training / education	14	13%
Preparing employees with cultural knowledge and/or language	15	14%
Creating employment in off-season	5	5%
Total	104	100%

What practices do you use to invest in your people? Select all that apply.

Response	#	%
Individual training plans	15	15%
Annual performance reviews	16	16%
Employee incentive programs	15	15%
Offer Indigenous cultural activities	14	14%
Regular On-the-job training	20	19%
Employee Orienting/Onboarding new employees	19	18%
Other	4	4%
Total	103	100%

Session #4 – Dec 2 – Future of Labour in Indigenous Tourism

What level of skills and education is important to you in selecting candidates? (pick all that apply)

Response	#	%
Cultural knowledge	18	21%
Driver licence	11	13%
Experience from workplace training (on-the-job training)	23	26%
First Aid training	8	9%
High school	3	3%
Host Certification – FirstHost, Serving it Right	9	10%
Post-secondary	6	7%
Professional training – trades, accounting, transportation	9	10%
Total	87	100%

Which year do you feel is the most realistic to return to 2019 labour/employee levels by the end of? (select one)

Response	#	%
2021	2	7%
2022	5	17%
2023	11	37%
2024	11	37%
2025	1	3%
None	0	0%
Total	30	100%

By 2024, do you feel you will be back at or stronger than you were in 2019?

Response	#	%
Stronger	19	66%
Same	6	21%
Weaker	0	0%
May not be open	0	0%
Unknown	4	14%
Total	29	100%

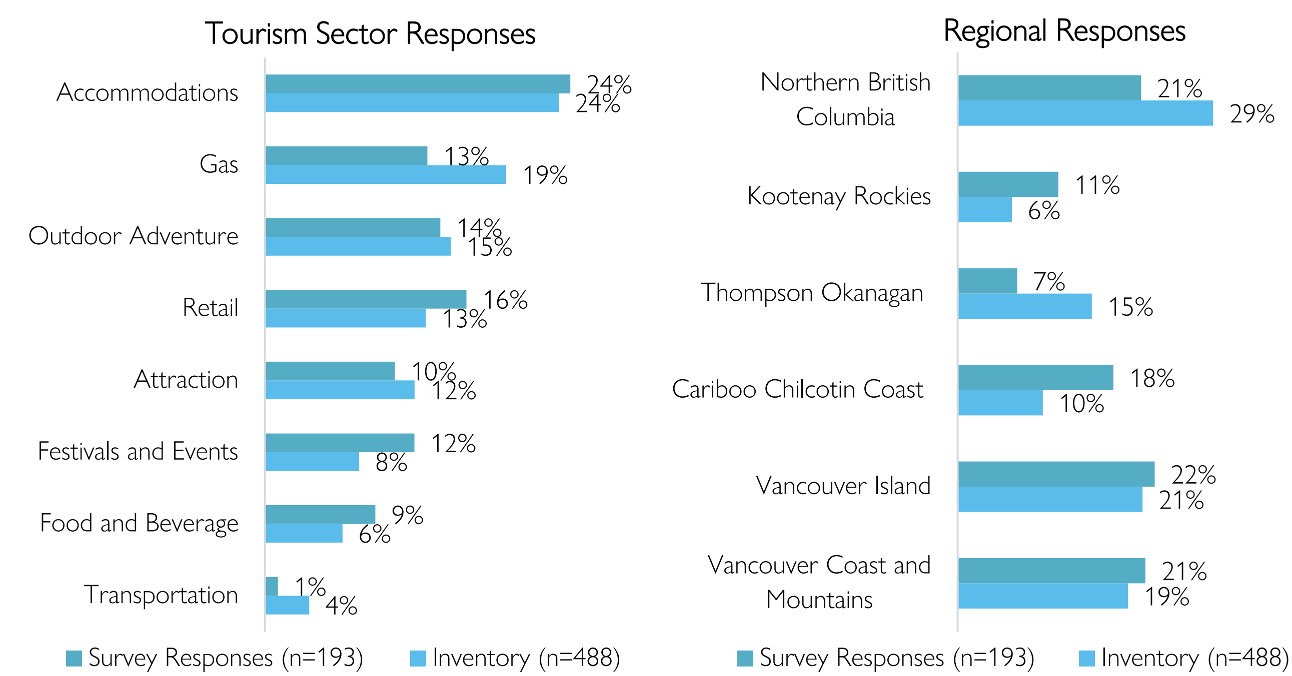
APPENDIX F: INDIGENOUS TOURISM BUSINESS SURVEY ANALYSIS, EMPLOYMENT ESTIMATE METHODOLOGY AND PROJECTIONS, AND ECONOMIC IMPACT ASSESSMENT

Indigenous Tourism Business Survey Analysis

Indigenous tourism businesses were sent an online survey via email between mid-April to May 2020. Multiple email and telephone call reminders along with an incentive were used to encourage survey responses. It was complemented by a similar but shortened telephone interview during late August and September from known Indigenous gas stations and festivals and events businesses across the province.

Data from the online business survey and telephone calls were merged into one database for analysis. With a few exceptions, overall responses were representative of Indigenous tourism businesses throughout the province (Exhibit 133). Survey responses were slightly less than the overall population for gas stations and transportation businesses and in the in Thompson Okanagan and Northern BC tourism regions (Exhibit 133).

Exhibit 133: BC Indigenous Tourism Businesses Inventory and Survey Responses by Tourism Section and Region



Weighting of Indigenous tourism businesses survey responses was employed to ensure that provincial results represented the distribution of businesses by tourism sector. Responses of businesses were adjusted (or weighted) to represent the inventory of Indigenous tourism businesses by tourism sector. For example, outdoor adventure businesses total 15% of all Indigenous tourism businesses but only totaled 13% of survey responses. To rectify this slightly underrepresentation, each outdoor adventure survey response was given a survey weight of 1.10521 (or each survey response equals 1.10521 survey responses, Exhibit 134). Survey response weighting only impacts provincial data summaries (Exhibit 134).

Overall, the impact of data weighting was minimal given most weights were values of less than '3'. The exception is for transportation businesses where a larger weight was employed.

Exhibit 134: BC Indigenous Tourism Businesses Survey Response Weighting

	Businesses		Survey Responses		
Tourism Sector	#	% of Total	#	%	Weight
Attraction	49	12%	20	10%	1.15800
Accommodations	119	24%	46	24%	0.98831
Outdoor Adventure	76	15%	26	13%	1.10521
Food and Beverage	27	6%	21	11%	0.57185
Festivals and Events	49	8%	23	12%	0.63401
Retail	60	13%	30	16%	0.82919
Gas	91	19%	25	13%	1.49253
Transportation	17	4%	2	1%	3.43111
SUB-TOTAL	488	100%	193	100%	NA

Employment Estimates and Projections

Indigenous tourism employment estimates were based on survey responses to the early 2020 Indigenous tourism business survey. Each business was allocated to one of the seven sub-sectors (Accommodations, Attraction, Food and Beverage, Outdoor Adventure, Retail, Gas, and Transportation) based on their reported main business activity. The survey also asked businesses to detail their 2019 position type, number of people in those positions as well as if they were full time or part time positions. These data were cleaned, and position type allocated to the standard National Occupation Classification (NOC) codes obtained from Statistics Canada.

Responding business employment profiles were extrapolated to develop 2019 employment estimates for all Indigenous tourism businesses in British Columbia. Employment counts by NOC codes were also extrapolated from survey responses to employment by occupation for the whole sector. These sectors data were then grouped by region to calculate regional totals. The only exemption to the occupational adjustment was in the region of Kootenay Rockies, in which case adjusting results from an employer with an exceptionally large workforce would have skewed the employment total in this region. In this case, occupation results from this employer were not adjusted.

For employment projections from 2020 to 2027, it is noted that due the business disruption and uncertainty81 brought on by the COVID-19 pandemic, business survey responses about future employment were no longer accurate. Instead, it was assumed that future Indigenous Tourism sector employment will follow a similar pattern as future tourism employment in British Columbia. These estimates were presented to Tourism HR Canada (THRC) by the Conference Board of Canada in a September 2020 report entitled Briefing: COVID-19 Impact on Tourism Sector Employment and Revenues.

Like the THRC tourism employment projections, overall future Indigenous tourism employment levels for BC was projected in three scenarios including:

- Scenario 1: Returning to 2019 Employment Levels in 2023 – Optimistic.
- Scenario 2: Returning to 2019 Employment Levels in 2024 – Realistic.
- Scenario 3: Returning to 2019 Employment Levels in 2025 – Pessimistic.

Assumptions

Key assumptions when developing these estimates include:

- The Indigenous tourism labour sector will respond at the same rate as the overall tourism industry,
- The domestic tourism market will rebound faster than the international tourism market,
- Overall, the Indigenous tourism business survey results are generally representative of Indigenous tourism businesses in BC, and
- There are no other disastrous events that impact the BC tourism industry in subsequent years.

Economic Impact Assessment

The standard economic impact analysis model gathers information on different sources of expenditure (input) to assess the dollar value of their contribution to a specified economy (output). The Input-Output Model is built based on the input-output structure of the economy, which is essentially a set of tables describing the flows of goods and services amongst the various sectors of the economy. Such a model is especially useful in determining how much additional production is generated by a change in the demand for one or more commodities or by a change in the output of an industry.

In the context of economic impact analysis of the Indigenous tourism sector, normally the research team will collect data either on consumer expenditure received or operating cost of the businesses incurred to produce the goods and services they sell. Such information will allow for estimation of the level of production activities required to meet demand, and using the input-output model, allow for derivation of the value of Gross Domestic Product (GDP), employment, and to an extent, tax revenue impacts. However, it is also recognized that, access to enterprise-level operating cost information can be difficult due to confidentiality issues and sampling issues. Instead, employment information of businesses was collected from the operator survey and sector-wide employment estimates were derived.

[81] Given the survey responses were collected early in the COVID-19 pandemic when businesses were not completely aware of the complete impact of COVID-19.

Fortunately, the structure of the provincial and territorial input-output multipliers, published by Statistics Canada, allow for working "backwards" – from the known level of employment, to derive the value of output produced, which in turn can be used to derive other impact variables such as GDP and labour income.

The types of impact usually measured in an input-output analysis include:

- Direct Impacts – this type of impact measures the increase in industrial output and the increase in an industry's labour force due to changes of business activities. In this case, the impact refers to increased production in the tourism sub-sectors of accommodation services, food and beverage services, outdoor adventure, and so on.
- Indirect Impacts – this type of impact measures the change in industrial output and employment demand in sectors that supply goods and services used in the operation of the businesses directly impacted.
- Induced impact – measures the changes in output and employment demand over all sectors of the economy as a result of income increased in households impacted both directly and indirectly.

Total economic impact of the Indigenous tourism sector is the sum of direct, indirect, and induced impacts.

For the purposes of this study, the impact values are derived from the 2017 provincial and territorial input-output multipliers, developed by Statistics Canada. It should be noted that employment impact estimates from the multiplier tables are based on total compensation per job in 2017, and therefore impact values in GDP, labour income and revenue, etc. need to be "inflated" to 2019 values to account for price increase.[82]

[82] Data necessary for this adjustment has been derived from Statistics Canada's Table 36-10-0104-01 Gross domestic product, expenditure-based, Canada, quarterly (x 1,000,000).

APPENDIX G: NOC AND NAICS FOR INDIGENOUS TOURISM IN BC

Throughout the report, there are numerous representations of the industries and occupations that make up the Indigenous tourism sector in BC. "Tourism" is not a stand-along industry in the standard industry classification. Rather, it is a group of industries providing tourism goods and services, as well as hospitality services. It should be noted that an industry does not have to only serve tourists to qualify as a tourism industry, for example a restaurant does not serve tourists only, but locals as well. Instead, an industry is considered a tourism industry if "as a direct result of the absence of tourism (it) would cease or continue to exist only at significantly reduced levels of activity."[83]

The Human Resource Module (HRM) of the Canadian Tourism Satellite Account (CTSA) was developed by Statistics Canada and serves as a useful planning and forecasting tool for policy makers in the tourism, employment, and training areas. Statistics at the national level as well as at the provincial and territorial level are available, providing a snapshot of the tourism industries and their associated occupations in a particular year. Based on this data, analyses can be made on the following key statistics – jobs, hours worked and employment earnings – starting from 1997. Derived variables, such as number of full-time equivalents, average hourly earnings and average annual hours worked per job can also be examined. The HRM contains a list of industries (based on the North American Industry Classification System – NAICS in short), 37 in total, that are considered tourism industries.[84] All occupations in these tourism industries are tourism occupations. These industries though do not fully correlate to the offerings of Indigenous tourism. In order to maintain the reliability of the Indigenous tourism data, several tourism industries have been grouped together, and for the purposes of this study the Indigenous tourism businesses examined are within these five categories, despite Indigenous tourism including tourism services and other related goods and services (i.e., cultural). Thus, the tourism industry groups of the Human Resource Module (HRM) include:

- Transportation – Air transportation not available in Provincial-Territorial Human Resource Module for reasons of confidentiality; and all other transportation including rail, water, bus, taxi, and vehicle rental.
- Accommodation
- Food and beverage services
- Recreation and entertainment
- Travel services.

Similarly, for occupations to be included in data series, certain criteria must be met to protect data reliability. Mostly, only occupations where employment counts were above 5,000 in the Census are chosen, and any occupations where

[83] See the definition of "tourism industry" under the Glossary, in Statistics Canada's publication Provincial-Territorial Human Resource Module of the Tourism Satellite Account, 2012.

[84] For a complete list of tourism sub-sectors, see Appendix E: Tourism industries in the Human Resource Module in the publication Provincial-Territorial Human Resource Module of the Tourism Satellite Account, 2012.

the number of employed are below 2,500 are removed from the list and grouped into "other occupations" in a specific tourism industry.

In this report, employment in the Indigenous tourism sector has mostly followed the same tourism industries defined in the HRM, such as employment estimates were sought after for the industries of Transportation, Accommodation Services, Food and Beverage Services, as well as Recreation and Entertainment. The exception was travel services was excluded as there are few Indigenous operators in this area. Festivals and Events were also excluded from labour calculations as nearly all were coordinated by volunteers or as a position requirement in a Band government agency, and there were only a couple organizations that existed solely to coordinate a festival or event. On the other hand, retail (including gas stations) has been identified as the Indigenous businesses selected for the study are the ones whose existence was to serve tourists and through research it was revealed the majority of these gas station also offered cultural goods such as food and gifts.

The terms used to describe tourism sub-sectors are more in line with common industry language, i.e., Attractions, Accommodation, Food and Beverage, Outdoor Adventure, Retail, and Transportation. The concordance between these two ways of describing the same industry/sector, along with employment estimates, is shown in Exhibit 135.

The profile of Indigenous workers and non-Indigenous workers in the province's tourism sector in Section 8.2 provided data for occupations similar to those in the HRM, while the list of occupations in the Indigenous tourism sector in Section 8.4 has not followed the list in HRM, due to data (un)availability. Instead, occupational details shown in Section 8.4 are based on those identified via the tourism operator surveys, as shown in the following table.

Exhibit 135: Concordance Table Showing Common Tourism Sub-Sectors and NAICS, Employment

Common Names	Employment	NAICS
Attraction	233	711 Performing arts, spectator sports and related industries 712 Heritage institutes
Accommodations	1,484	721 Accommodation services
Outdoor Adventure	637	713 Amusement and recreation
Food and Beverage	971	722 Food services and drinking place
Retail	372	44-45 Retail trade
Gas	478	44-45 Retail trade
Transportation	73	48 Transportation

Source: O'Neil Marketing & Consulting

North American Industry Classification System – Adapted for Indigenous Tourism in BC

The table below are the North American Industry Classification System (NAICS) codes that related to Indigenous tourism businesses in British Columbia and the related tourism services offered. The list was developed by reviewing the list of Indigenous tourism businesses in BC and matching their primary service with the NAICS codes. This list is broader than the mainstream tourism industry list as it includes many spin-off and cultural businesses and services that are of importance to First Nations and are directly connected to their tourism offerings, while these are not linked to tourism in the primary tourism industry. This list also presents other business opportunities to First Nations and Indigenous people for expanding and strengthening their tourism industry.

NAICS # and Industry
44-45 – Retail Trade
447 - Gasoline stations, gas stations with convenience stores, other gas
453 - Miscellaneous store retailers - gift, novelty, souvenir, electronic shopping
48-49 – Transportation and Warehousing
481 - Air transportation - scheduled, non-scheduled air and specialty flying
482 - Rail transportation
483 - Water transportation - deep sea, coastal, great lakes water, inland water
485 - Transit and ground passenger transportation - urban, interurban, taxi, limousine, charter bus, other transit and ground passenger transportation
487 - Scenic and sightseeing transportation - land, water, other
51 - Information and cultural industries - motion picture, video exhibition
53 - Real estate and rental and leasing
532 - Rental and leasing services - automotive, passenger car rental and leasing, RV rental
56 - Administrative and support, waste management and remediation services - travel agencies, travel arrangement and reservation services, tour operators, other travel, and reservation services
71 - Arts, entertainment, and recreation
711 - Performing arts, spectator sports and related industries - dance, theatre, musical, other performing arts, spectator sports, promoters, live theatre and other performing arts, sports, facilities including sports stadiums, festivals and events, independent artists, writers, and performers
712 - Heritage institutions - museums, heritage sites, history, non-commercial arts, science and other museums, historical sites and heritage sites, zoos and botanical gardens, nature parks and other similar institutions
713 - Amusement, gambling, and recreation industries - amusement parks, gambling industries, casinos, golf courses, country clubs, skiing facilities, marinas, fitness, and recreation sports centres, bowling centres
72 - Accommodation and food services
721 - Accommodation services - traveller accommodations, hotels, motor hotels, resorts, casino hotels, bed and breakfast, housekeeping cottages and cabins, recreational vehicle parks and caps, campgrounds, hunting and fishing camps, vacation camps, rooming, and boarding houses
722 - Food services and drinking places - special food services, food service contractors, caterers, mobile food services, drinking places, full service and limited-service eating places, personal care services

National Occupation Classification (NOC) Codes for Indigenous Tourism in BC

The National Occupation Classification (NOC) system assigns a code to every occupation in Canada. The codes can be used to assess a person's skills. The following list are occupations directly related to Indigenous tourism businesses in BC. The list was developed by assigning a NOC code to every occupation identified in this research project Indigenous tourism operator survey and reviewing the NOC list for occupations related to the full Indigenous tourism business identified in this project including other labour.

Unique Code	NOC Position Name
0111	Financial managers
0511	Library, archive, museum, and art gallery managers
0621	Retail and wholesale trade managers
0631	Restaurant and Food Service Managers
0632	Accommodation service managers
1123	Professional occupations in advertising, marketing, and public relations
1221	Administrative officers
1222	Executive assistants
1226	Conference and event planners
1241	Administrative Assistant
1311	Accounting technicians and bookkeepers
1411	General office support workers
1414	Receptionists
1431	Accounting and related clerks
1524	Purchasing and inventory control workers
3236	Massage therapists
3413	Nurse aides, orderlies and patient service associates
4112	Lawyers and Quebec notaries
4152	Social workers
4156	Employment Coordinator
4167	Recreation, sports and fitness policy researchers, consultants, and program officers
5133	Musicians and singers
5134	Dancers
5212	Technical occupations related to museums and art galleries
5226	Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
5227	Support occupations in motion pictures, broadcasting, photography, and the performing arts
5231	Announcers and other broadcasters
5232	Other performers, n.e.c.
5244	Artisans and craftspersons

Unique Code	NOC Position Name
5253	Sports officials and referees
5254	Program leaders and instructors in recreation, sport and fitness
6312	Executive housekeepers
6313	Accommodation, travel, tourism, and related services supervisors
6316	Other services supervisors
6321	Chefs
6322	Cooks
6421	Retail Salesperson
6512	Bartenders
6513	Food and Beverage Servers
6525	Hotel front desk clerks
6531	Tour and travel guides
6532	Outdoor sport and recreational guides
6541	Security guards and related security service occupations
6552	Other customer and information services representatives
6611	Cashiers
6621	Service station attendants
6711	Food counter attendants, kitchen helpers and related support occupations
6721	Support occupations in accommodation, travel and facilities set-up services
6722	Operators and attendants in amusement, recreation and sport
6731	Light duty cleaners
6733	Janitors, caretakers and building superintendents
7511	Transport truck drivers
7512	Bus drivers, subway operators and other transit operators
7514	Delivery and courier service drivers
7522	Public works maintenance equipment operators and related workers
7533	Boat and cable ferry operators and related occupations
8611	Harvesting labourers
8612	Landscaping and grounds maintenance labourers

INDIGENOUS TOURISM BC

www.Indigenousbc.com

Canada

BRITISH COLUMBIA

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