



INDIGENOUS TOURISM

LABOUR MARKET RESEARCH

Roots to a Future – Regional Profile – Vancouver, Coast & Mountains



Canada



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

About the Indigenous Tourism British Columbia (ITBC)

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

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

Ex-Officio

- Ryan McCormick, BC Ministry of Advanced Education & Training
- Jessica McKierahan, BC Ministry of Tourism, Arts & Culture



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 (Klawum' Patki) 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

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



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Roots to a Future – Regional Profiles Vancouver, Coast & Mountains

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Roots to a Future – Regional Profile Vancouver Coast Mountains

This section includes a profile of the Indigenous tourism industry in this tourism region. It summarizes the number and type of Indigenous tourism businesses. The Indigenous tourism operator inventory list has been periodically updated for over 20 years for ITBC research and audit projects. 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. Finally, the 2020 Indigenous tourism business survey results 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 1: BC Regional Tourism Map



VANCOUVER, COAST & MOUNTAINS



Exhibit 2: Vancouver, Coast & Mountains – Indigenous Tourism Operators by Sector 2020

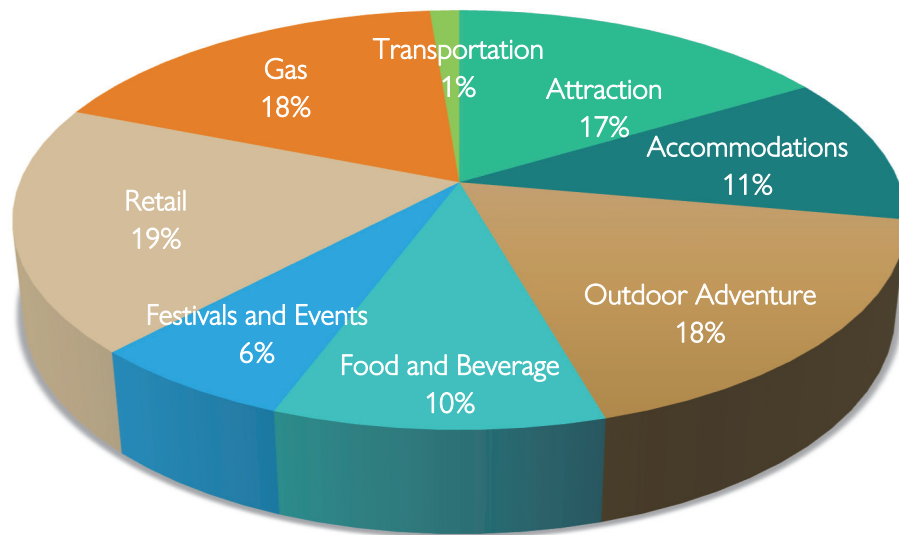


Exhibit 3: Vancouver, Coast & Mountains – Indigenous Tourism Operators by Sector 2003 to 2020

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 4: Vancouver, Coast & 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%

NOTE: New Indigenous businesses are businesses that were not included in the 2017 BC Indigenous tourism operators list.

Exhibit 5: Vancouver, Coast & Mountains – Percentage Ownership by Type

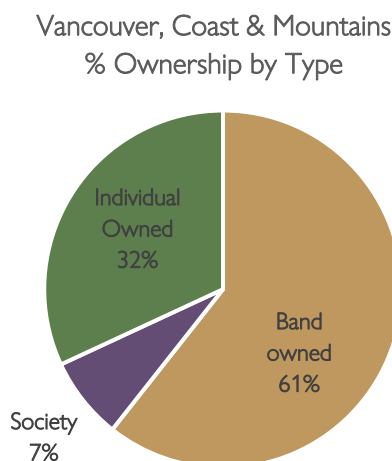


Exhibit 6: Vancouver, Coast and Mountains – Employment by National Occupation Code (NOC)

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%

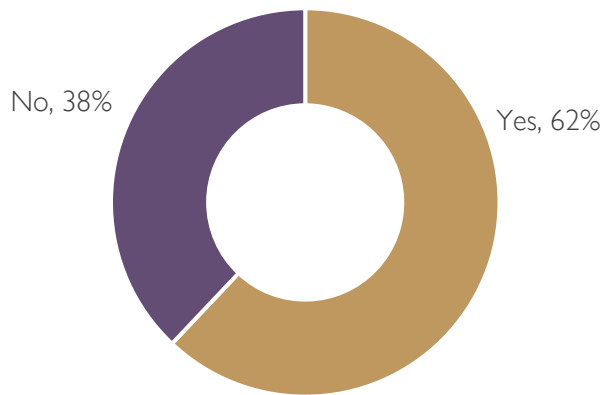


Vancouver, Coast & Mountains – Indigenous Tourism Business Survey Results

Business Profile

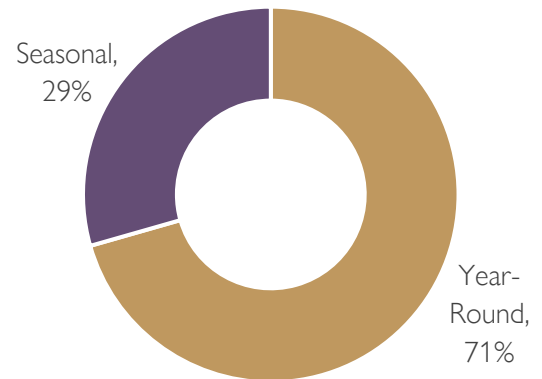
Exhibit 7: Vancouver, Coast & Mountains – Indigenous Tourism Business Profile

On-Reserve Operations



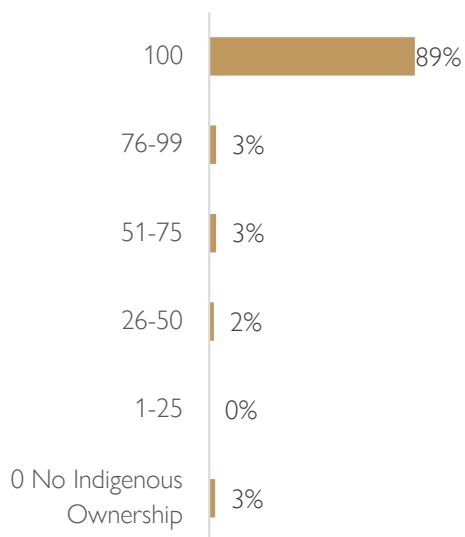
Does your business primarily operate on-reserve? n=37

Seasonality of Business Operations



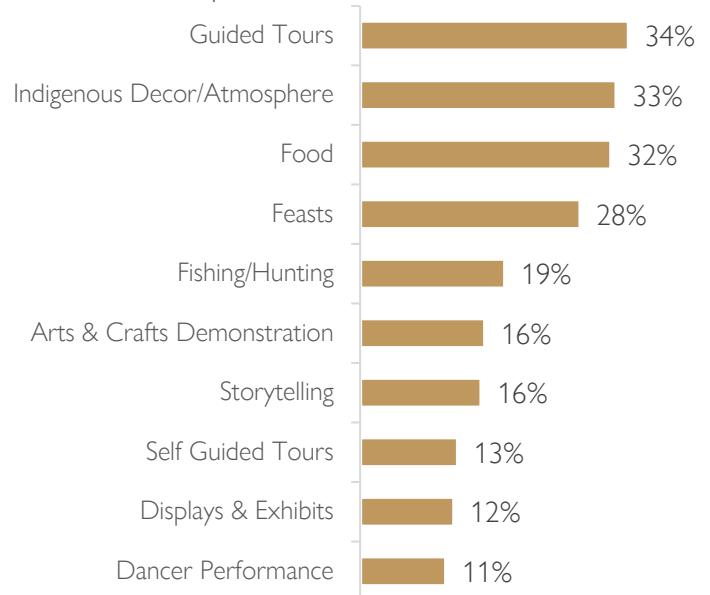
What months of the year does your business primarily operate? n=35

Indigenous Ownership



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

Top 10 Cultural Features Offered

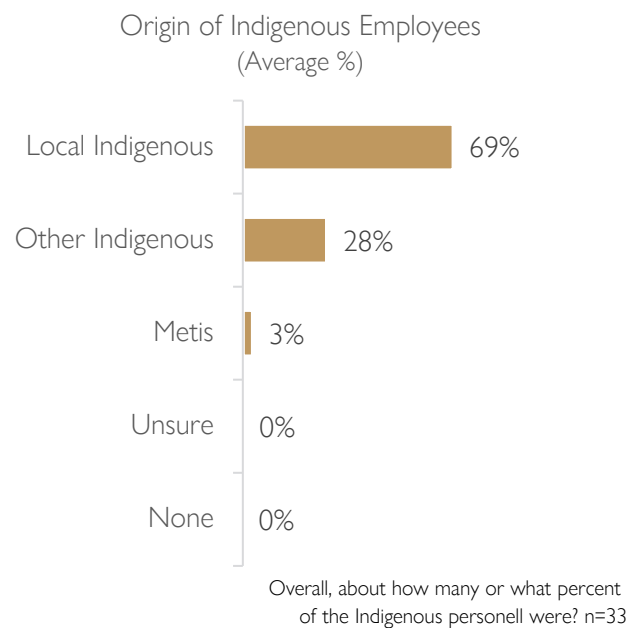
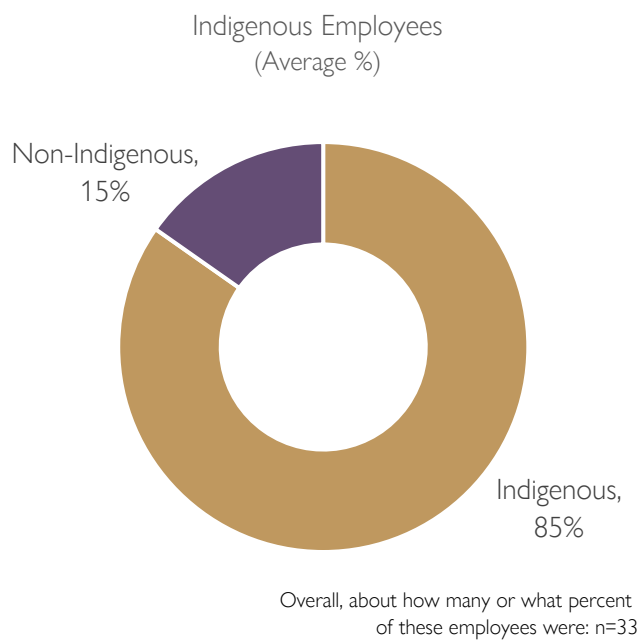
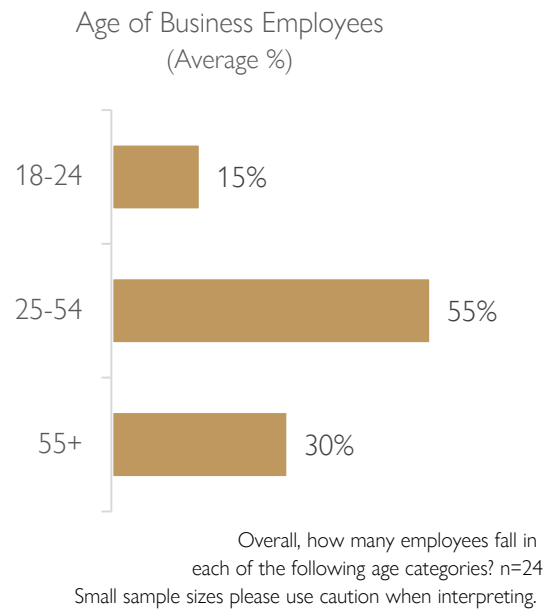
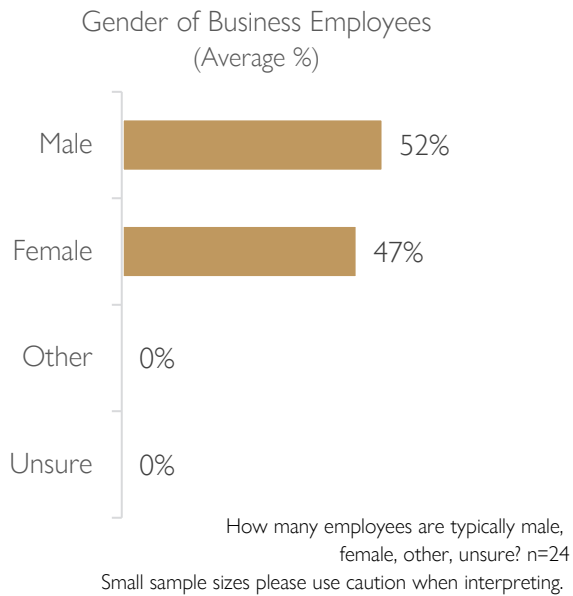


What Indigenous cultural features/activities characterize your tourism business?
40 Businesses selected 108 cultural features.

Note: Businesses could select multiple cultural features therefore it is expected that percentages do not total 100%.

Employee Profile

Exhibit 8: Vancouver, Coast & Mountains – Indigenous Tourism Business Employee Profile

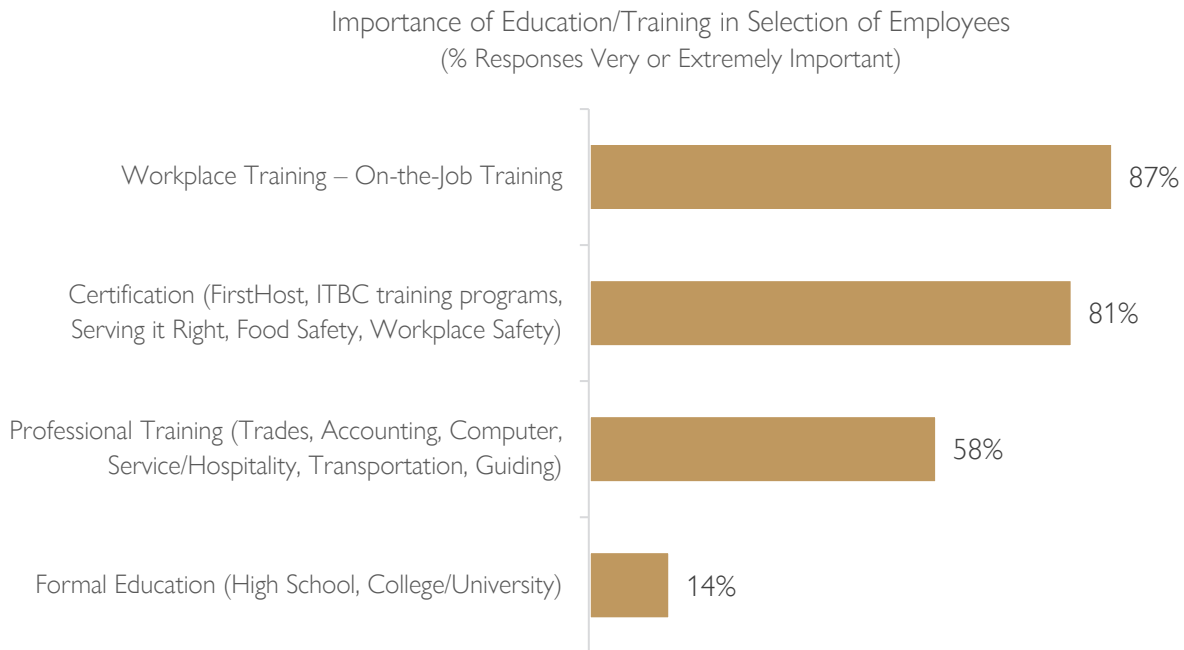


Skills and Recruitment

Exhibit 9: Vancouver, Coast & Mountains – Indigenous Tourism Business Skills and Recruitment Profile

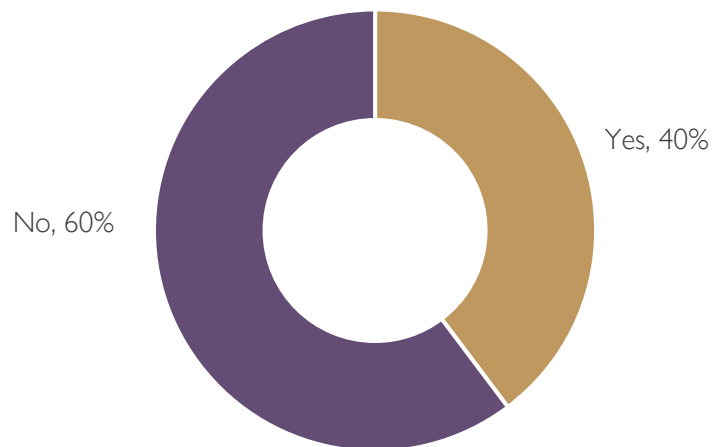


Overall, what uniquely Indigenous cultural skills or knowledge are used in any of these positions?
Businesses could provide more than one response so totals add to more than 100%.
36 business responded with 101 responses.



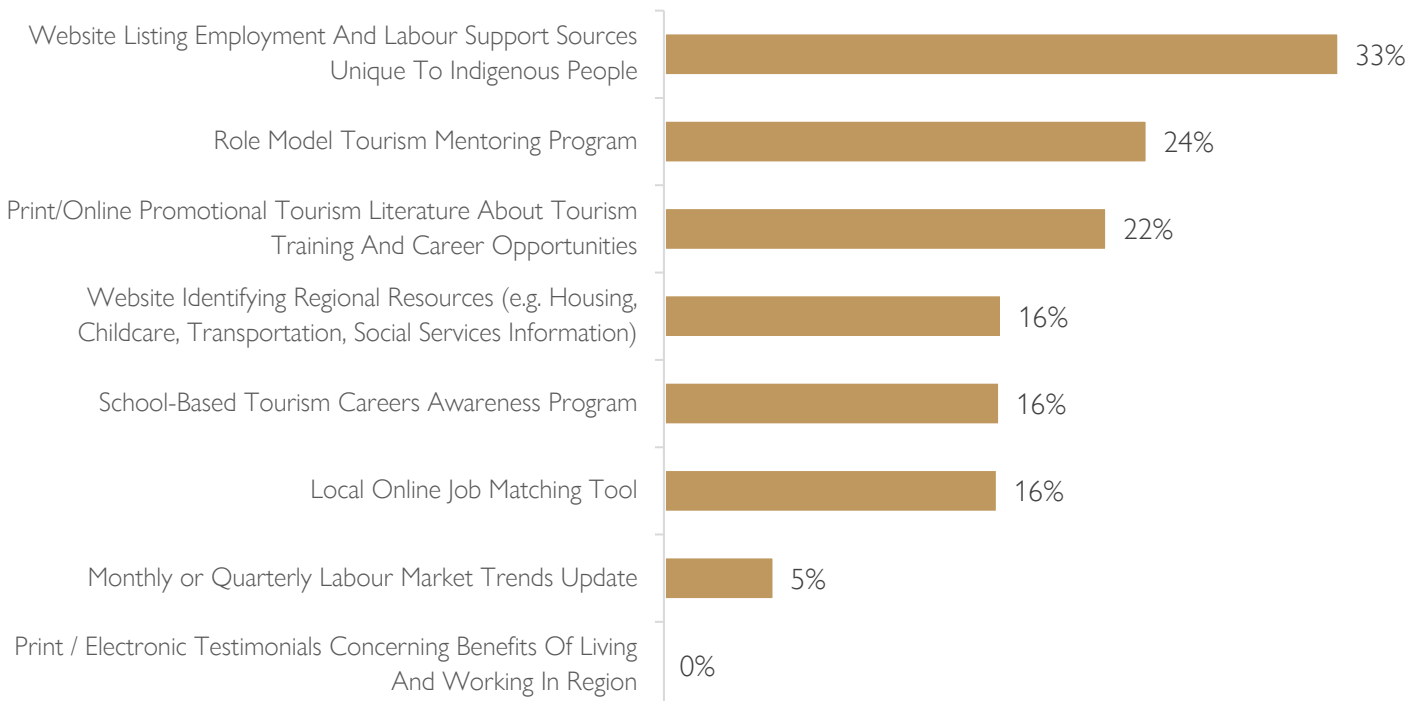
How important were the presence of the following formal education/training qualifications in your typical selection of employees?
n=24. Small sample sizes please use caution when interpreting.

Recruitment Challenges
(% of Businesses)



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.

Future Recruitment Tools to Attract Indigenous Employees
(% of Businesses Responding 'A Lot')



Over the next 5 years (2020/24, to what extent 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 interpreting.



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