



INDIGENOUS TOURISM

LABOUR MARKET RESEARCH

Roots to a Future – Regional Profile – Vancouver Island



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

Prepared by:

Klawum' Patki (Beverley O'Neil)
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

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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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List of Exhibits

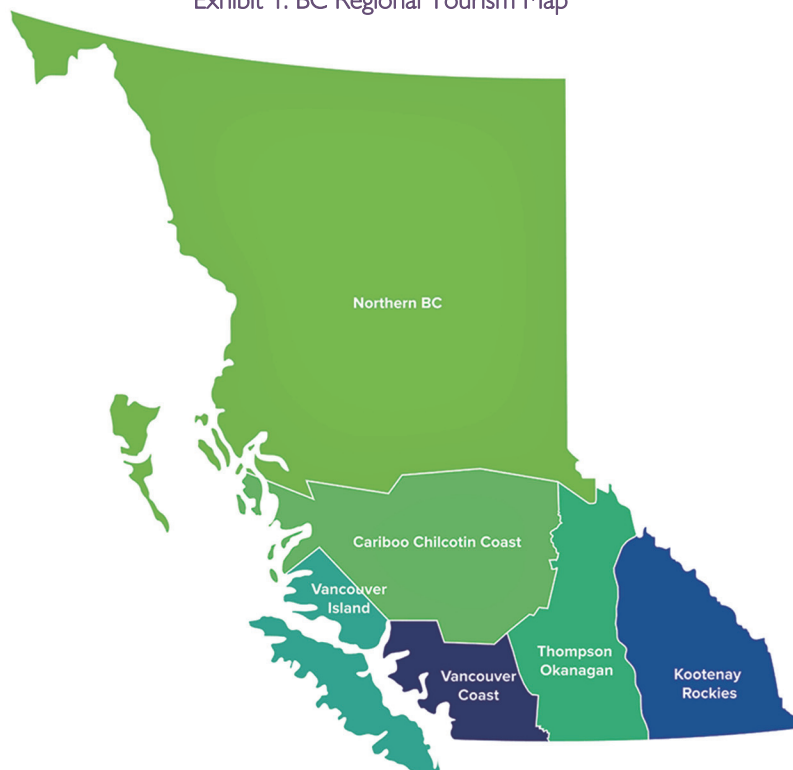
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INDIGENOUS TOURISM LABOUR MARKET RESEARCH Roots to a Future – Regional Profile Vancouver Island

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



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Exhibit 2: Vancouver Island – Indigenous Tourism Operators by Sector 2020

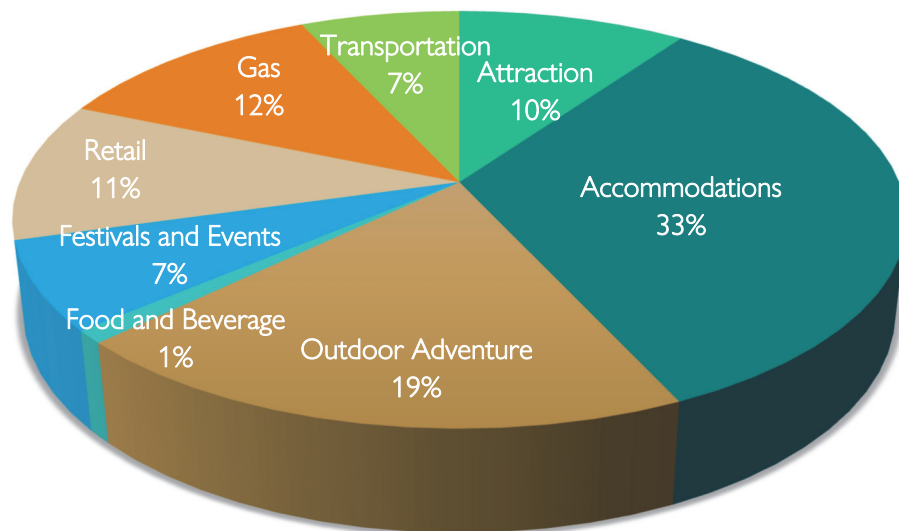


Exhibit 3: Vancouver Island – Indigenous Tourism Operators by Sector 2003 to 2020

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 4: 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%

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

Exhibit 5: Vancouver Island – Percentage Ownership by Type

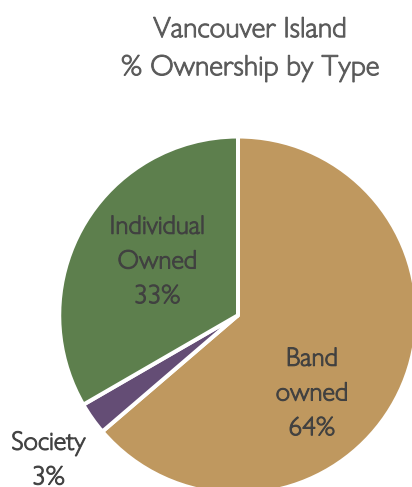


Exhibit 6: Vancouver Island– Employment by National Occupation Code (NOC)

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%

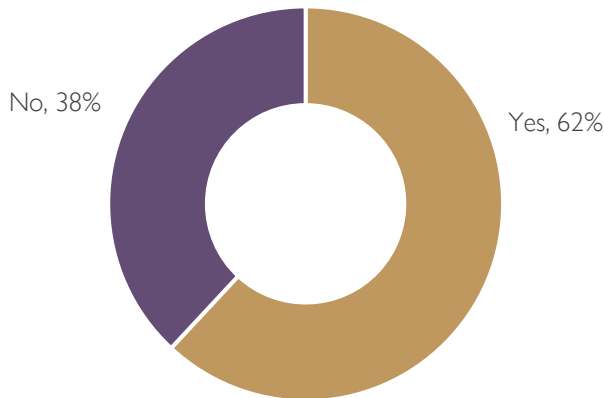


Vancouver Island – Indigenous Tourism Business Survey Results

Business Profile

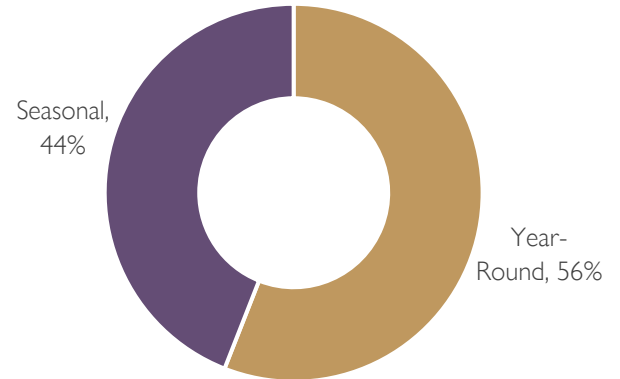
Exhibit 7: Vancouver Island – Indigenous Tourism Business Profile

On-Reserve Operations



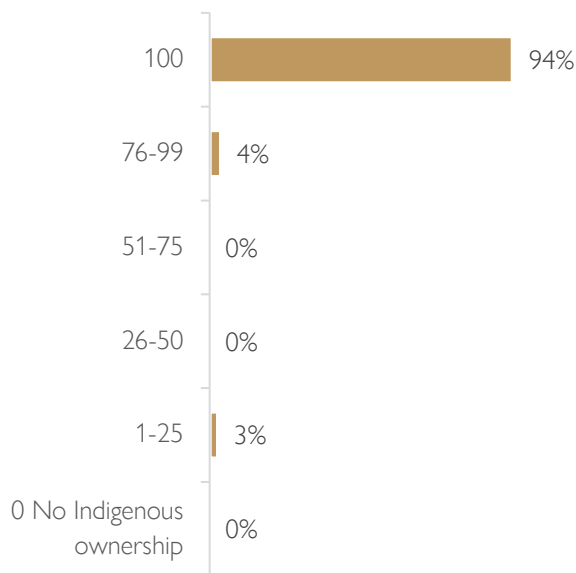
Does your business primarily operate on-reserve? n=44

Seasonality of Business Operations



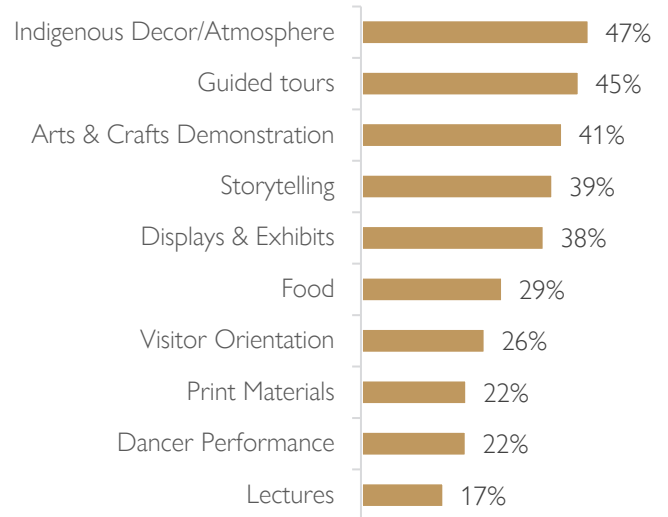
What months of the year does your business primarily operate? n=46

Indigenous Ownership



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

Top 10 Cultural Features Offered



What Indigenous cultural features/activities characterize your tourism business? n=46.

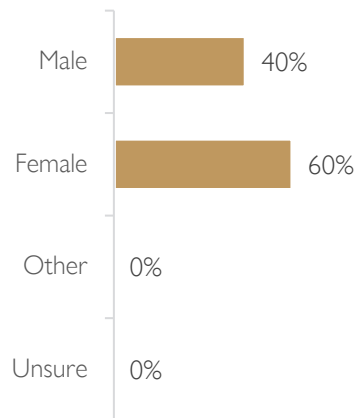
46 Businesses selected 193 cultural features.

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

Employee Profile

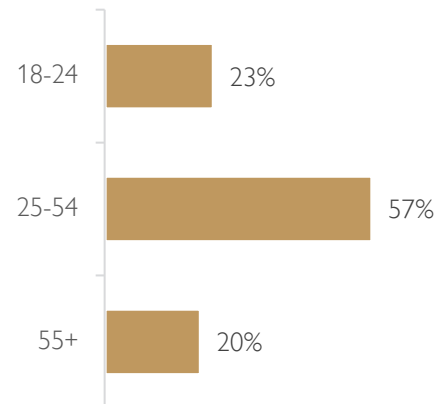
Exhibit 8: Vancouver Island – Indigenous Tourism Business Employee Profile

Gender of Business Employees
(Average %)



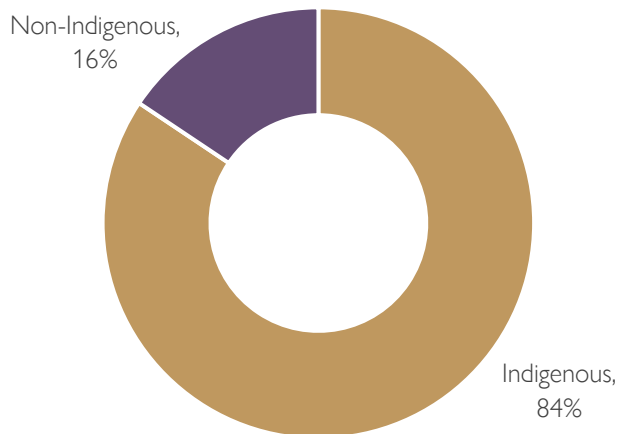
How many employees are typically male, female, other, unsure? n=32

Age of Business Employees
(Average %)



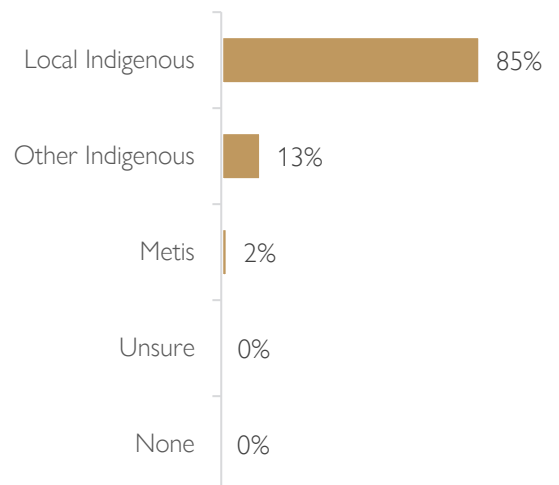
Overall, how many employees fall in each of the following age categories? n=32

Indigenous Employees
(Average %)



Overall, about how many or what percent of these employees were: n=42

Origin of Indigenous Employees
(Average %)



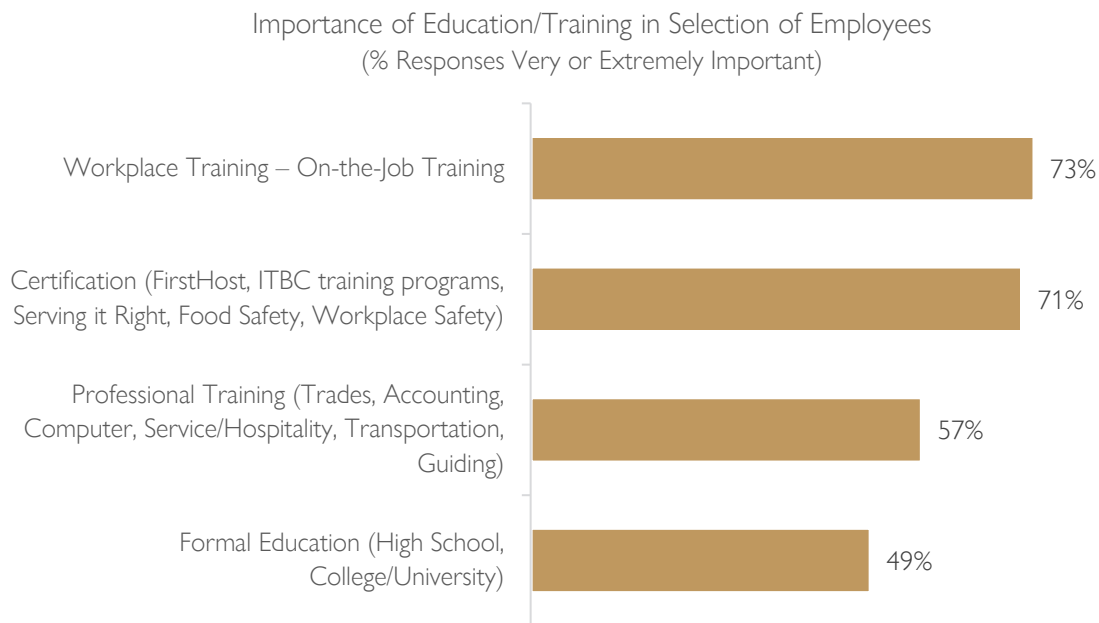
Overall, about how many or what percent of the Indigenous personell were? n=42

Skills and Recruitment

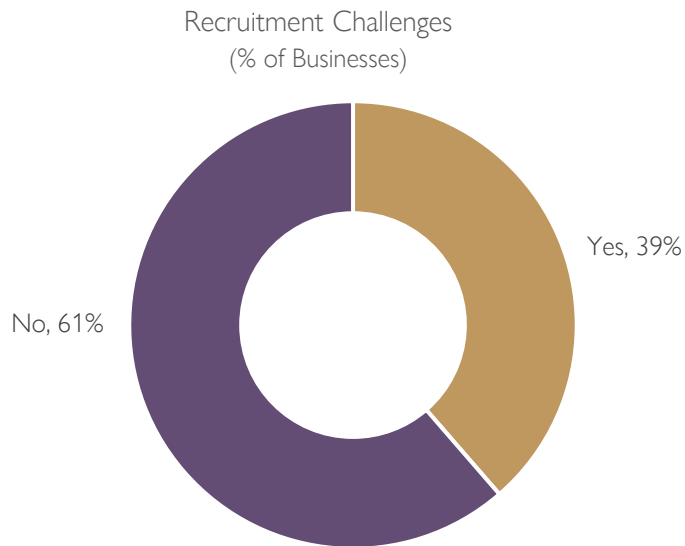
Exhibit 9: Vancouver Island – Indigenous Tourism Business Skills and Recruitment Profile



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%.
40 business responded with 135 responses.

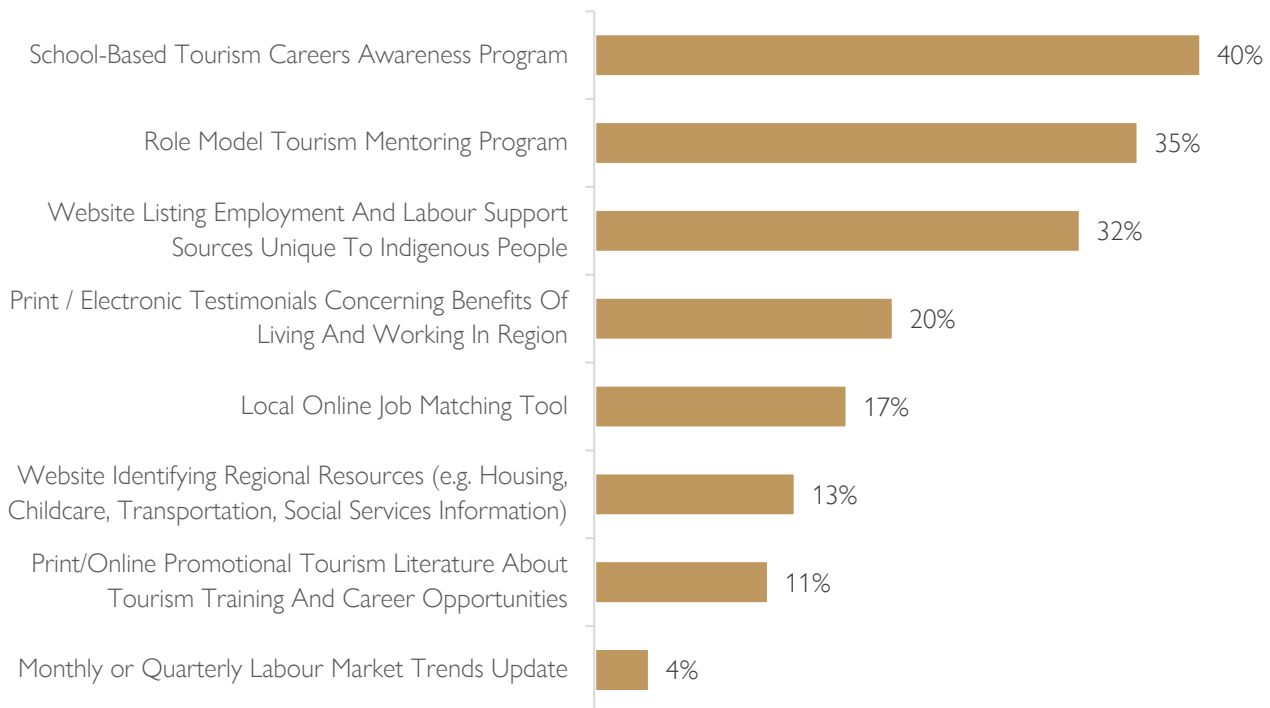


How important were the presence of the following formal education/training qualifications in your typical selection of employees?
n=34.



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

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=33. Small sample sizes please use caution when interpreting.



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