

# **Indigenous Tourism: Policy as Reconciliation in the Canadian Domestic Market**

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# Approval

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## **Abstract**

Indigenous tourism has been identified as a vehicle for addressing the many socio-economic disparities faced by Indigenous communities. This is supported by literature that have examined how tourism can have an economic impact. While previous studies on Indigenous tourism have largely focused on building capacity and sustainable development, little has been explored on its role in Canada's reconciliation narrative. This narrative includes 1) government policies that support Indigenous tourism; 2) social, economic, political impacts that Indigenous tourism has on Indigenous communities; and 3) social impacts that Indigenous tourism has on tourists, both international and domestic. Through exposure to Indigenous tourism experiences, interactions with Indigenous cultures may challenge and change tourists' preconceived ideas, perceptions, attitudes or expectations of Indigenous peoples. Currently, Indigenous tourism is largely supported by international tourists rather than domestic tourists. This capstone seeks to understand the domestic demand for Indigenous tourism in the Province of British Columbia (BC) because there is a lag in this particular market. Based on findings from descriptive statistics and case studies analyses, three policy options are introduced and evaluated for their efficacy in increasing domestic participation in Indigenous tourism. This is an important opportunity for government policies to encourage and support reconciliation between Indigenous and non-Indigenous Canadians by developing the domestic market.

**Keywords:** Indigenous; tourism; reconciliation; demand; domestic participation; British Columbia; Canada

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## List of Acronyms

CTS	Canadian Travel Survey (1994-2004)
DBC	Destination British Columbia
DC	Destination Canada
ISED	Innovations, Science and Economic Development Canada
ITAC / ATAC / ATMC	Indigenous Tourism Association of Canada, formerly known as the Aboriginal Tourism Association of Canada (ATAC) as well as the Aboriginal Tourism Marketing Circle (ATMC)
ITBC / ATBC	Indigenous Tourism Association of British Columbia, formerly known as the Aboriginal Tourism Association of British Columbia (ATBC)
UNDRIP	United Nations Declaration on the Rights of Indigenous Peoples
TSRC	Travel Survey of Residents of Canada (2006-2017)
UNWTO / WTO	World Tourism Organization

## Executive Summary

The Indigenous peoples of Canada have experienced a history of colonial policies, which has led to many socio-economic disparities today. In addressing this history, the Government of Canada publicly apologized to the Indigenous peoples in 2008. However, it was not until 2016 that the Government of Canada officially adopted the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP). Since then, both federal and provincial governments have taken action in the reconciliation process by implementing or improving policies to better support Indigenous communities. These policies include Indigenous tourism which itself has created positive economic impacts. However, little research has been conducted on the role of Indigenous tourism in the overall reconciliation narrative. This narrative includes 1) government policies that support Indigenous tourism; 2) social, economic, political impacts that Indigenous tourism has on Indigenous communities; and 3) social impacts that Indigenous tourism has on tourists, both international and domestic. Exposure to Indigenous tourism experiences may challenge and change tourists' preconceived ideas, perceptions and expectations of Indigenous peoples. Thus, Indigenous tourism can facilitate the process of reconciliation through the interactions between tour operators and tourists. The policy problem for this capstone is that the rate at which Canadians participate in Indigenous tourism in the Province of British Columbia (BC) is too low. This capstone analyzes the domestic demand for Indigenous tourism in BC in order to inform better government policies in supporting the Indigenous tourism industry.

This capstone begins by examining the use of "Indigenous", which is derived from the United Nations' (UN) criteria to identify peoples who have a historical continuity to the land. In Canada, the adoption of the term "Indigenous" has largely been influenced by the federal government's commitment to implement UNDRIP in 2016. The Indigenous peoples of Canada include the First Nations, Métis and Inuit peoples. Historically, the terms "Aboriginal" and "native" have also been used to address all three groups. However, these terms have largely been replaced by "Indigenous". From the legal standpoint, "Aboriginal" is still used to address "Aboriginal rights" as per Section 35 of the *Constitution Act, 1982*. In addition, "Indian" is used in the legal context to identify a First Nations person registered under the *Indian Act*. "Indigenous tourism" is defined as,

“All tourism businesses majority owned, operated and/or controlled by First Nations, Métis or Inuit peoples...” (ATAC, 2013).

In exploring the domestic demand for Indigenous tourism in BC, a few enabling factors or constraints have been identified. They include awareness of Indigenous tourism, ease of accessibility, number of product offerings and perceptions and attitudes. Furthermore, a descriptive statistics analysis and two case studies analysis are conducted to trace the evolution of domestic demand for Indigenous tourism in BC, Nova Scotia (NS) and Australia. The results from these analyses reveal that current participants are likely to have high levels of household income and education. This suggests that the costs and the awareness of Indigenous tourism may be constraints preventing Canadians from participating in Indigenous tourism in BC in particular.

Based on key findings from the descriptive statistics and case studies analysis, three policy options are introduced to address the policy problem. The first policy option is to launch a pilot study to provide accurate data and further our understanding of the domestic demand for Indigenous tourism. As the Indigenous tourism industry continues to evolve; the methods used to collect market data must also evolve. The second policy option is to launch domestic marketing campaigns. This initiative aims to increase awareness of Indigenous tourism businesses in select demographic groups. The third policy option is to introduce a tax credit for participation in Indigenous tourism. This is a long-term goal to reduce the cost of air travel in order to stimulate domestic travel. It is recommended that the first policy option be implemented before the other two. With more accurate data, the first policy option can provide insights that guide the implementation of other policy options such as marketing campaigns, introducing a tax credit and so on.

# Chapter 1.

## Introduction

Indigenous tourism is one of the largest and fastest growing tourism markets in Canada. Between 2014 and 2017, Indigenous tourism contributed \$1.7 billion in direct economic benefits (GDP) to the Canadian economy (ITAC, 2019). This was a 23% increase compared to the 12% increase from the overall Canadian tourism industry during the same period. Because of the increasing Indigenous presence on the political scene, federal and provincial governments have implemented policies to demonstrate their commitment to reconciliation with Indigenous communities. One of these policies is to support Indigenous tourism, which has emerged as one of Canada's main tourism product offerings.

The discussions regarding Indigenous tourism have largely been focused on building capacity and sustainable development. This is supported by the understanding that Indigenous tourism can improve the socio-economic conditions faced by Indigenous communities. However, few studies have examined the role that Indigenous tourism can play in the reconciliation process between Indigenous and non-Indigenous Canadians. In the Canadian context, reconciliation comes in many guises. In this case, reconciliation is participation in Indigenous tourism. Reconciliation is not solely the economic contribution tourists provide, but rather the ability of Indigenous tourism to challenge and change tourists' perceptions of Indigenous cultures. This capstone is based on the premise that the tourists' perceptions and attitudes can change.

This capstone addresses the policy problem that, given Canada's commitment towards reconciliation, the rate at which Canadians participate in Indigenous tourism in BC is too low. This policy problem may be prevalent across all provinces and territories of Canada. But for this capstone, the scope is limited to examining the domestic participation in BC. It is important to note that domestic tourists can travel from anywhere in Canada to BC. So, in addition to provincial data, some data at the national level have been examined to further our understanding on the domestic demand. Key findings indicate current participants are likely to have high levels of income and education.

This capstone is divided into ten chapters. The next chapter introduces the international framework that recognizes Indigenous peoples and explore further on how this framework applies in the Canadian context. Chapter three introduces the role that Indigenous tourism can play in driving reconciliation forward between Indigenous and non-Indigenous Canadians. Chapter four examines the current domestic participation in Indigenous tourism and the dangers of a low domestic participation. Chapter five addresses the policy problem and identifies the stakeholders. Chapter six lays out the theoretical framework and analytical methodologies. Chapter seven contains the findings of the primary and secondary methodologies. Chapter eight discusses the policy objectives, criteria and policy options. Chapter nine contain the evaluation of the policy options and policy recommendation. Finally, chapter ten concludes this capstone project.

## **Chapter 2.**

### **Indigenous peoples**

This chapter presents the criteria used to identify Indigenous peoples around the world and examines the Indigenous peoples of Canada, their relationship with Canada in the past, present and future.

#### **2.1. Indigenous peoples of the world**

The United Nations (UN) is the global organization for the recognition of Indigenous peoples and the protection of their rights as distinct peoples. In 2007, the UN Declaration on the Rights of Indigenous Peoples (UNDRIP) was adopted by the United Nations General Assembly and is the most comprehensive international instrument on the rights of Indigenous peoples. However, even on the international stage where a considerable amount of work has been done to define “Indigenous peoples,” there has yet to be a formal definition adopted by international law. The most widely cited working definition is that of the Martinez Cobo Study of 1982:

Indigenous communities, peoples and nations are those which, having a historical continuity with pre-invasion and pre-colonial societies that developed on their territories, consider themselves distinct from other sectors of the societies now prevailing on those territories, or parts of them. They form at present non-dominant sectors of society and are determined to preserve, develop and transmit to future generations their ancestral territories, and their ethnic identity, as the basis of their continued existence as peoples, in accordance with their own cultural patterns, social institutions and legal system. (UN, 1983)

From this working definition, several criteria emerged to help define Indigenous peoples (OHCHR, 2013). The major ones include occupation of ancestral lands and strong ties to natural resources; distinct social, economic or political characteristics; and distinct language, culture and beliefs.

Today, Indigenous peoples make up 5% of the world’s population (UN, 2009). However, they are often the most marginalized and impoverished groups in their countries. Throughout history, Indigenous peoples have suffered from colonization,

dispossession of their lands, oppression and discrimination. As a consequence of these injustices, Indigenous peoples make up 15% of the world's poor (UN, 2009).

## 2.2. Indigenous peoples of Canada

In Canada, the terms “Indians”, “natives” and “aboriginals” were used in the past to refer to Indigenous peoples. Indigenous peoples are the first peoples, the original occupants and the caretakers of the land. Archaeological evidence indicates that the first signs of human occupation dates back to approximately 10,000 years ago in areas such as the Ottawa River watershed (Morrison, 2005). Prior to the arrival of European settlers, Indigenous peoples lived a nomadic life and roamed the land as they saw fit, following the seasons. This lifestyle was disrupted following the arrival of Europeans.

In 1867, the British Parliament passed the *British North America Act* and created the Dominion of Canada at Confederation. This gave the Canadian government the power to control Indigenous interests, peoples and the lands they lived on. As a result, a series of laws were implemented to integrate the Indigenous population into an Euro-centric society. This led to the eventual establishment of Indian Residential Schools in the 1870s and the passing of the *Indian Act* of 1876, which defined the government's relationship with Indigenous peoples and set out rules on their governance. This *Act* consolidated previous policies of disenfranchisement to assimilate Indigenous peoples into Canadian society and continues to this day to impact Indigenous communities.

In 1922, *The Story of a National Crime* was published, exposing the federal government's suppression of information on the health of Indigenous peoples (Bryce, 1922). This publication included a 1907 report finding on one of the residential schools from the Prairie provinces.<sup>1</sup> The finding indicated that the mortality rate for Indigenous students who were attending or had attended that school can be as high as 75% during a span of 16 years (Bryce, 1922). The Indian Residential School (IRS) system was historically one of the most devastating policies implemented by the Government of Canada on the Indigenous population. This policy goal was assimilation of Indigenous peoples to values of Western European culture. The objective was to “kill the Indian” in

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<sup>1</sup> The school mentioned is the File Hills Indian Residential School (1889 – 1949) which was located approximately 100km northeast of Regina, Saskatchewan.

the child by forcibly removing young children from their families, communities and cultures. In total, it is estimated that over 150,000 children were taken away from their families and homeland. The last residential school in Canada just closed in 1996 (Canadian Encyclopedia, 2012). While residential schools were in operation, many students were deprived of sanitary living conditions and endured years of physical, sexual and emotional abuse which continue to have deep intergenerational impacts on families today.

Currently, Indigenous peoples of Canada are recognized as three distinct groups: First Nations, Métis and Inuit. They are the inheritors and caretakers of ancestral lands. Through years of governmental policies to assimilate their populations, Indigenous peoples have experienced a reality that is different from the mainstream society. Indigenous peoples have sought recognition of their identities, their way of life and their rights to traditional lands, territories and natural resources. Yet, throughout the history of European occupation, their rights have been violated and undermined. Indigenous peoples are among the most disadvantaged and vulnerable populations in Canadian society.

### **2.2.1. Indigenous rights and title**

The *Constitution Act, 1982* was a historic moment for the Indigenous communities across Canada as it included section 35(1) of the Constitution, which states,

The existing aboriginal and treaty rights of the aboriginal peoples of Canada are hereby recognized and affirmed. (*Constitution Act, 1982*)

This section was ambiguous and was ultimately brought to the Supreme Court of Canada where the final ruling was given in the *Sparrow* case of 1990. While the final ruling of the *Sparrow* case was a victory for Indigenous communities on fishing rights, the case had also revealed the degree to which colonialism still exist in the Canadian legal system. This was reflected through the contradictive reasonings behind the Court's interpretive processes used to define "existing", "aboriginal rights" and "recognized and affirmed" of section 35(1).

In defining “existing”, the Court concluded that existing Indigenous rights must be interpreted flexibly to permit their evolution over time. However, in defining “aboriginal rights”, the Court established that such rights must be sourced to time immemorial or prior to European contact (Monture-Angus, 1999). If existing rights are connected to the past, it could be interpreted that Indigenous rights are frozen in time and that Indigenous peoples are thus denied the right to self-determination. This contradicts the initial reasoning that Indigenous rights can be exercised in a contemporary manner. Lastly, in defining “recognized and affirmed”, if Indigenous and treaty rights are excluded from section 35, it creates a jurisdictional vacuum within the division of powers between the federal and provincial governments, which could be filled by Indigenous governments (Monture-Angus, 1999). In response, the Court found that Canadian governments have a fiduciary relationship to the Indigenous peoples and so federal legislative powers can continue the right to legislate with respect to Indigenous peoples.

Today, Court cases continue to define and shape the relationships between Indigenous peoples and their rights and title within the broader constitutional reality in Canadian society. In the next sections, the criteria defined in Chapter 2.1 is used to further explore the Indigenous peoples of Canada.

### **2.2.2. Occupation of ancestral lands**

From 1871 to 1921, eleven Numbered Treaties were negotiated between the Canadian government and the First Nations groups who occupied the land. The land mass under negotiation covers most of today’s Ontario, Manitoba, Saskatchewan, Alberta, Northwest Territories and parts of British Columbia (Canadian Encyclopedia, 2011b). Treaty-making was historically used among First Nations groups for the purpose of peace, friendship and access to shared resources (Bird, 2018). In exchange for ceding their land to the Canadian government, First Nations were compensated. In reality, these treaties have served to extinguish the rights of Indigenous peoples (Canadian Encyclopedia, 2006a). The turning point on the issue of extinguishment of Indigenous rights came about during the Court in *Delgamuukw* 1997 ruling. The decision concluded that there needs to be proper consultation and compensation when such rights have been extinguished (Canadian Encyclopedia, 2006a). *Delgamuukw* 1997 was an important and historic case because it recognized that Indigenous titles constitute an ancestral right which is protected by the Constitution.

Aside from the historic Numbered Treaties, Indigenous nations and Canadian governments have also started a modern treaty process beginning in 1975. This process has allowed Indigenous communities to achieve self-government and gain control of their ancestral territory. For example, the BC Treaty Commission was established in 1991 to facilitate on-going treaty negotiations in BC's six-stage treaty process. Today, over 50 Indigenous nations are negotiating treaty negotiations to seek self-determination. This modern treaty process has allowed Indigenous interests and governments to negotiate renewed legal and political relationships based on mutual recognition. Evidently, the jurisdictional vacuum identified in *Sparrow* is being filled with self-governments. On-going negotiations between Indigenous nations and governments of Canada and BC continue to define the relationships between them and affirm the negotiation of their rights to ancestral lands.

### **2.2.3. Distinct social, economic and political characteristics**

Indigenous peoples face many socio-economic and political challenges. Indigenous survey respondents indicate these challenges include income inequality, homelessness, unemployment, government and political representation (Environics Institute, 2019). These issues stem from Canada's colonial history, including the legacy of the residential school system, which continues to impact today's generation.

The social characteristics of Indigenous peoples reveal various challenges such as the lack of housing, food and access to opportunity (Canadian Encyclopedia, 2011a). These unresolved challenges have led to other interrelated social issues, including substance abuse, and high suicide and unemployment rates. In addition, Indigenous children account for 48% of children in foster care (Statistics Canada, 2016) and Indigenous adults account for 30% of admissions to provincial correctional institutions and services (Statistics Canada, 2018a).<sup>2</sup>

In economics, the median income of the Indigenous population is \$25,526 and the non-Indigenous population is \$34,604 (Statistics Canada, 2015). In other words, an Indigenous person is likely to earn only 74% of what a non-Indigenous person would earn. Among the three Indigenous groups, this wage gap is most apparent for the First

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<sup>2</sup> Indigenous adults also account for 27% of *federal* correctional institutions and services (Statistics Canada, 2018).

Nations population with a median income of \$21,875, which is 63% of the non-Indigenous median income (Statistics Canada, 2015). In addition, 30% of Indigenous children live in poverty which is double the rate of non-Indigenous children (Behind the Numbers, 2017).

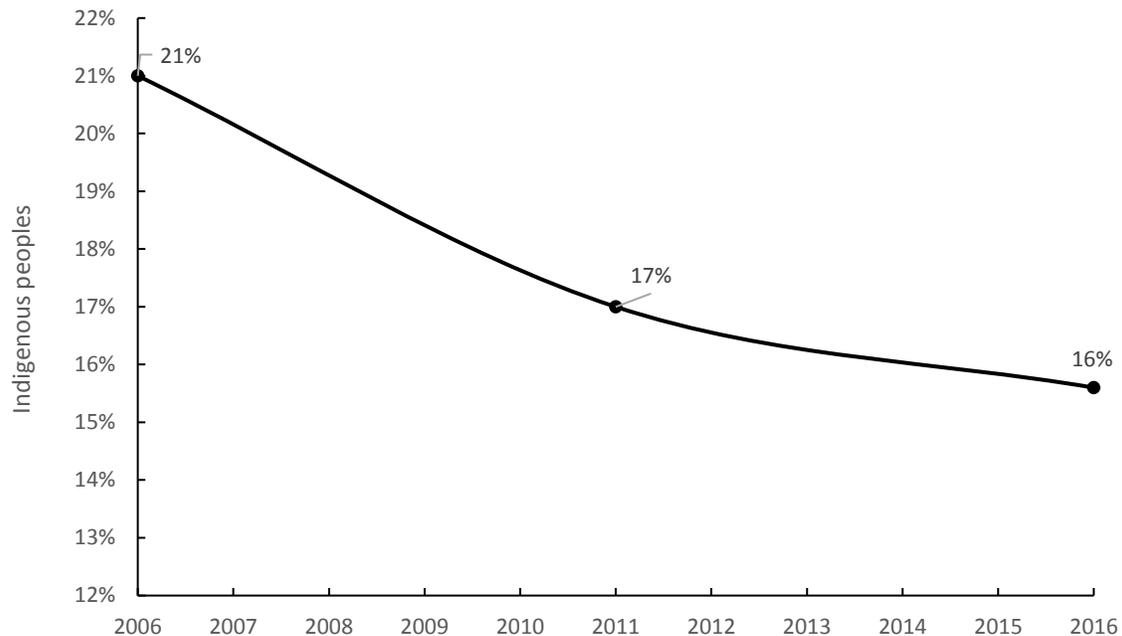
Also, Indigenous peoples experience under-representation in Canadian institutions. This is reflected in the Canadian justice system (Law Now, 2019). From 2017 to 2018, of 79 candidates who were appointed to Canada's superior courts, 3 were Indigenous (FJA, 2018). Furthermore, during the *Kokopenance* case of 2015, the Court ruled that it was a constitutional violation to put together a jury which excluded a significant part of Mr. Kokopenance's community on the basis of race (Law Now, 2019).

Despite these distinct characteristics, the Indigenous population is the fastest growing demographic group in Canada. In 2016, Indigenous peoples accounted for 4.9% of Canada's population, up from 3.8% in 2006 and 2.8% in 1996 (Statistics Canada, 2018b). It is projected that this number will rise to near 6% by 2036, which also means the rise of the mentioned socio-economic and political challenges as well.

#### **2.2.4. Distinct language, culture and beliefs**

Distinct to the Indigenous peoples are the diverse languages and dialects that are integral to their identities and beliefs. Indigenous languages are the building blocks to Indigenous peoples' cultures and play a vital role in the passing of traditional knowledge from one generation to the next through the use of oral histories. However, the legacy of residential schools has immeasurably affected Indigenous peoples because Indigenous children were forbidden to speak their own languages. This disruption has led to a significant loss of traditional languages and knowledge. As shown in Figure 1, the percentage of Indigenous people who could converse in an Indigenous language dropped to 16% in 2016.

**Figure 1** Percentage of Indigenous people who could converse in an Indigenous language



Source: Statistics Canada, (2017).

Currently, there are more than 70 Indigenous languages spoken in Canada. All Indigenous languages fall within four degrees of endangerment (UNESCO; Norris 2013). To address this issue, the Government of Canada introduced Bill C-91, the *Indigenous Languages Act* (Parliament of Canada, 2019). The legislation affirms Indigenous languages as inherent rights and requires the federal government to provide funding to help support Indigenous organizations (AFN, 2019). It also demonstrates Canada's commitment to help preserve, restore and enhance Indigenous heritage, language and culture.

### **2.3. Reconciliation**

In 1996, the Royal Commission on Aboriginal Peoples (RCAP) released its final report with the conclusion that Indigenous and non-Indigenous peoples of Canada needed to redefine their relationships with each other in order to build a new path forward. After the report was released, the federal government publicly acknowledged its past mistakes and recognized that more initiatives were needed to support the social and economic challenges experienced by Indigenous peoples (Canadian Encyclopedia,

2006b). However, there were few discussions about constitutional changes that directly defined Indigenous peoples and their relationship with the Crown. Although the RCAP report can be seen as the first step towards reconciliation, it has effectively become a tool for research purposes rather than a blueprint for change.

As mentioned in the previous section, UNDRIP was passed by the United Nations General Assembly in 2007. UNDRIP identified the minimum standards needed for the survival, dignity and well-being of Indigenous peoples around the world. However, it was not until 2016 that Canada officially adopted and began implementing UNDRIP's recommendations. Evidently, the change of government in 2015 launched Canada's reconciliation agenda with the Indigenous peoples and gave this a much higher priority status.

In 2015, Prime Minister Justin Trudeau received the Truth and Reconciliation Commission (TRC) Final Report which included the tragic legacy of residential schools and 94 calls to action. After receiving the report, he stated that:

The Indian Residential School system, one of the darkest chapters in Canadian history, has had a profoundly lasting and damaging impact on Indigenous culture, heritage and language (Trudeau, 2015).

Since then, there has been an increase in the number of government initiatives as part of the federal government's commitment to reconciliation with Indigenous peoples. The report increased the national conversation about the lasting effects of intergenerational trauma. The calls to action challenged Canadians to work toward reconciliation. The dialogue on the process of reconciliation continues today with the Government of Canada committing to full implementation of the TRC's recommendations. In 2017, Prime Minister Justin Trudeau once again reaffirmed his government's commitment stating: "no relationship is more important to Canada than the relationship with Indigenous Peoples" (Trudeau, 2017).

Under the leadership of the Liberal government, Canada and its provinces continue to:

move beyond historic legacies of Crown denial, unilateralism and the doctrine of discovery to a new nation-to-nation relationship based on the recognition of rights, reconciliation, respect, co-operation and partnership (CIRNAC, 2019).

In 2019, the provincial government of BC officially passed legislation to implement UNDRIP, thus becoming the first province to align provincial laws with the UN Declaration (Government of British Columbia, 2019). The legislation allows for flexibility and provides a framework for the BC government enter into agreements with Indigenous governments on broader range of matters moving forward.

For the First Nations, Métis and Inuit peoples, culture, heritage, identity and traditions continue to live on. In recent decades, many efforts have been made through the Court system to define Indigenous peoples, their rights and their relationships to the Crown. Through UNDRIP, new policies set forth by the Indigenous nations, federal and provincial governments demonstrate there is a new path forward. While public institutions are starting to recognize the need for a new nation-to-nation relationship, it is equally important for other Canadians to understand and acknowledge the presence and contributions of the Indigenous peoples of Canada. However, a shift in the public's perceptions of Indigenous communities will take time. In the next chapter, I examine the concept of Indigenous tourism and its role in reconciliation.

## Chapter 3.

### Indigenous tourism

This chapter presents the concept and development of Indigenous tourism around the world, Canada's understanding of Indigenous tourism and the role that Indigenous tourism can play in the reconciliation narrative.

#### 3.1. Indigenous tourism around the world

Indigenous peoples have been involved in tourism around the world as early as the mid-1800s. Examples include the Sami in Scandinavia, ethnic minority groups in Asia, Indigenous guides, porters and servants in Africa, corroborees (cultural ceremonies) in Australia, Pink and White Terrances in New Zealand and First nations guides, hunters and interpreters in Canada (Whitford & Ruhanen, 2016). Today, one concept of Indigenous tourism is defined as:

Tourism activity in which Indigenous people are directly involved either through control and/or having their culture serve as the essence of the attraction. (Hinch & Butler, 1996)

The continued growth of the Indigenous tourism industry led to the establishment of the World Indigenous Tourism Alliance (WINTA) and its adoption of the Larrakia Declaration in 2012. WINTA is a global network of Indigenous and non-Indigenous organizations that facilitates and advances international partnerships in Indigenous tourism (WINTA, 2018). The Larrakia Declaration is a product of such a partnership with the World Tourism Organization (UNWTO). Underpinned by UNDRIP and UNWTO, the Larrakia Declaration guides the development of Indigenous tourism around the world through its six principles: respect, protection, participation, consultation, tradition and partnerships.<sup>3</sup>

Indigenous tourism is seen as a vehicle to preserve and promote traditional cultures while creating socio-economic opportunities for Indigenous communities (Whitford & Ruhanen, 2016). Some of the threats and challenges Indigenous cultures

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<sup>3</sup> See Appendix A for full details.

and tourism face include commodification and misappropriation by outsiders (UN, 2009). Overall, the growth of Indigenous tourism has led to a broader international recognition of Indigenous rights.

### **3.2. Indigenous tourism in Canada**

Over the past three decades, the understanding of Indigenous tourism in the Canadian context has evolved. Building on Hinch & Butler's concept, the Aboriginal Tourism Association of Canada (ATAC) defines Indigenous tourism as:

All tourism businesses majority owned, operated and/or controlled by First Nations, Métis or Inuit peoples that can demonstrate a connection and responsibility to the local Indigenous community and traditional territory where the operation resides. (ATAC, 2013)

This means an Indigenous tourism business can operate on land that may not be its ancestral territory. For example, an Inuit majority operated tourism business from Northern Canada that is operating in BC can be considered Indigenous tourism if the business can demonstrate a connection to the local Indigenous community. The ATAC also uses other terms such as *Indigenous cultural tourism* or *Indigenous cultural experiences* as tourism products that incorporate "Indigenous culture in a manner that is appropriate, respectful and true to the Indigenous culture being portrayed" (ATAC, 2013).

The growth of Indigenous tourism began in the 1980s and has been linked to the increased presence of First Nations peoples in the Canadian political scene (Henry & Hood, 2012). By the 1990s, several Indigenous development strategies were implemented by the governments of British Columbia, the Yukon and the Northwest Territories (Williams & Steward, 1997). This led to the establishment of several Indigenous tourism directories with the mandate to promote, protect and preserve Indigenous tourism. At the federal level, there were the Canadian National Aboriginal Tourism Association in 1990, the Aboriginal Tourism Programme under the Canadian Tourism Commission in 1994 and the Aboriginal Tourism Team Canada in 1996 (Whitford & Ruhanen, 2016). At the provincial level, this period saw the formation of the

Aboriginal Tourism Association of British Columbia (ATBC) in 1997.<sup>4</sup> Among these organizations, ITBC is the only one that remains today.

Indigenous tourism directories and their operations are largely funded through transfer payments from the federal and provincial governments. The coming and going of these organizations suggest a history of inconsistent government funding which led to the ultimate dissolution of these organizations. From a data standpoint, this leads to inconsistent time series data regarding Canada's Indigenous tourism sector. To address this issue, the Aboriginal Tourism Association of Canada (ATAC), formerly known as the Aboriginal Tourism Marketing Circle (ATMC), was established in 2013 with the mandate to facilitate coherent and strategic policy directions moving forward (Henry, 2013).<sup>5</sup> Since then, the Indigenous tourism industry has seen substantial growth in the number of product offerings and the level of tourist demands.

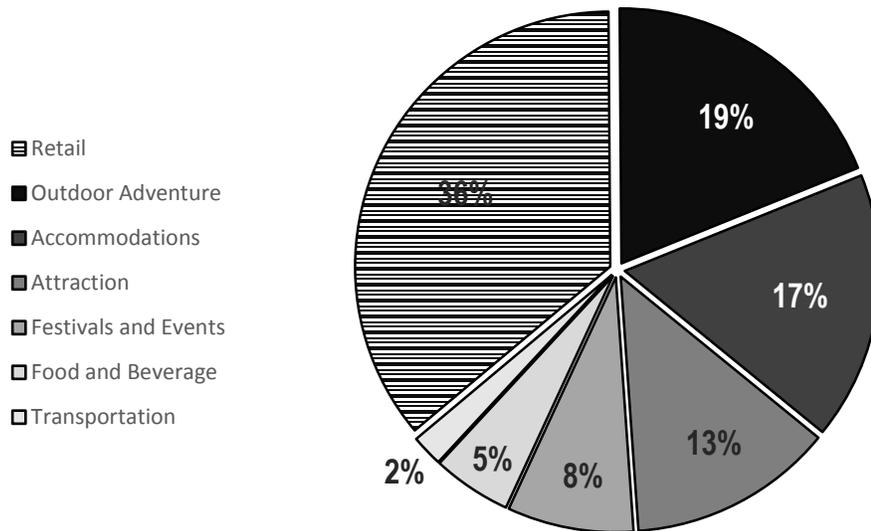
Indigenous tourism has established its position as an integral component of Canada's tourism product offerings. In May 2019, the federal government launched *Creating Middle Class Jobs: A Federal Tourism Growth Strategy* (ISED, 2019). Within this strategy, Indigenous tourism is identified as one of five key product lines for investment. The other four product lines are winter tourism, rural and remote tourism, culinary tourism and inclusive tourism. Investments in the five product lines are focused on preparing market readiness, onsite experiences development, developing consumer products, tours, festivals and special events. Figure 2 shows that BC's Indigenous tourism sector has now expanded to encompass businesses in retail, outdoor adventure, accommodations, attraction, festival and events, food and beverage and transportation. These businesses are distributed geographically across BC's six tourism regions and in both urban and rural areas. They include Vancouver, Coast and Mountains; Vancouver Island; Thompson Okanagan; Northern BC; Cariboo Chilcotin Coast; and Kootenay Rockies. Through the federal government's strategy, investments will further enhance the Indigenous tourism portfolio.

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<sup>4</sup> ATBC has since changed its name to ITBC (Indigenous Tourism Association of British Columbia).

<sup>5</sup> ATAC has since changed its name to ITAC (Indigenous Tourism Association of Canada).

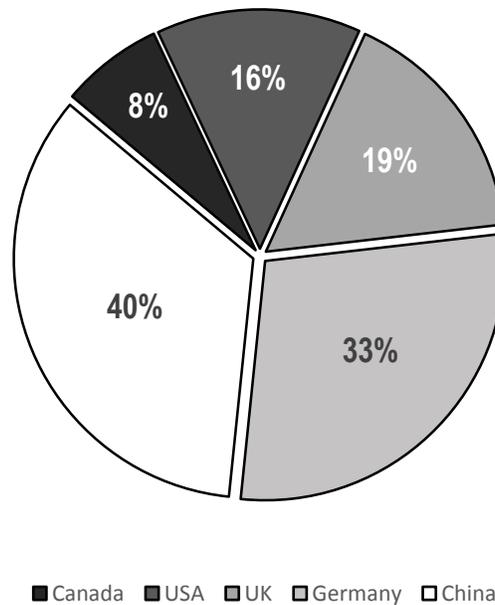
**Figure 2 Indigenous tourism businesses in BC, 2016.**



Source: ITBC, (2018).

For federal and provincial governments, Indigenous tourism improves the socio-economic conditions in Indigenous communities (Whitford & Ruhanen, 2016). Indigenous tourism can also diversify Canada's tourism portfolio in the competitive global tourism market. When international tourists bring foreign currency to Canada, their spending counts as exports and contributes to Canada's gross domestic product (GDP). In comparison, domestic tourism is seen as a transfer of money with the net balance being zero (Goh et al., 2015). When domestic tourists participate in Indigenous tourism, their spending may not increase GDP. But their spending may somewhat improve the average earnings of Indigenous peoples and thereby somewhat lower the economic disparities faced by Indigenous communities, both urban and rural. Hence, domestic tourism can be a useful tool to redistribute wealth and close income gaps. With the right balance between international and domestic tourists, Indigenous tourism can serve to sustain Indigenous economies. As shown in Figure 3, the 2014 balance in Indigenous tourism in Canada shows international tourists accounted for 92% of participation while domestic tourists accounted for the remaining 8%. This balance is further explored in Chapter 4.

**Figure 3 Percentage of tourists participating in Indigenous tourism in Canada, 2014.**



Source: ATBC, (2017).

From 2002 to 2014, direct employment in Indigenous tourism had nearly tripled from 12,566 to 33,100 as shown in Table 1. The direct gross output from Indigenous tourism had grown \$0.37 billion. During this period, the direct GDP contribution from Indigenous tourism had grown from \$596 million in 2002 to \$1.4 billion in 2014.

**Table 1 Economic Impacts of Indigenous Tourism in Canada.**

<b>Economic Impacts</b>	<b>2002</b>	<b>2014</b>
Full-time equivalent jobs	12,566	33,100
Direct gross output (billions)	\$2.28	\$2.65
Direct GDP contribution (billions)	\$0.596	\$1.4

Source: ATAC, (2015).

For Indigenous communities, the development of Indigenous tourism is supported by social, economic and political motivations. These factors reflect the efforts of Indigenous communities to break their dependent relationships with the federal and provincial governments in favour of self-government. Indigenous tourism is a means to acquiring more social, economic and political autonomy in terms of rights of access to and ownership of traditional territories (Berkes, 1994). This was true in 1994 and it is

true today. Moreover, it is important to note there are Indigenous perspectives that do not support tourism activities as a means to revitalize communities. By conforming to the tourist demand, Indigenous tourism is subject to the commodification process. This process can allow Indigenous communities better economic status, empowerment and dignity. For example, the design of a hand carved, Coast Salish salmon gets outsourced to foreign manufacturers for mass production. The design, which is a cultural property, becomes a commodity and generates revenue upon purchase by the tourists. However, tourists who purchase the commodity may not understand the importance of salmon in Coast Salish cultures. Without the protection of Indigenous cultural copyright, Indigenous tourism and cultures are at risk of losing authenticity. The risk is between generating more income, or forgoing the need for tourists to understand Indigenous cultures.

Indigenous tourism has benefitted both the federal and provincial governments and Indigenous communities. It has driven economic development and addressed some of the socio-economic disparities experienced by Indigenous communities. However, few have considered the role Indigenous tourism can play in changing the public's perception of Indigenous peoples, their culture and traditions. More specifically, there are no research that explore the role Indigenous tourism can play in the reconciliation process between non-Indigenous and Indigenous Canadians.

### **3.3. Reconciliation through Indigenous tourism**

The concept that tourism can foster peace and tolerance is explained by the Intergroup Contact Theory in social psychology. This theory contends that under certain conditions, intercultural interactions between majority and minority group members can enhance mutual understanding, which in turn reduces prejudice, conflict and tension (Allport, 1954).<sup>6</sup> The notion of peace through tourism was also adopted by the World Tourism Organization (WTO). The WTO believes tourism can contribute to "...improving mutual understanding, bringing people closer together and, consequently, strengthening international cooperation" (WTO, 1985). This understanding was reiterated in the Charter for Sustainable Tourism which states that:

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<sup>6</sup> Conditions include 1) equal status; 2) intergroup cooperation, 3) common goals; and 4) support from social and institutional authorities.

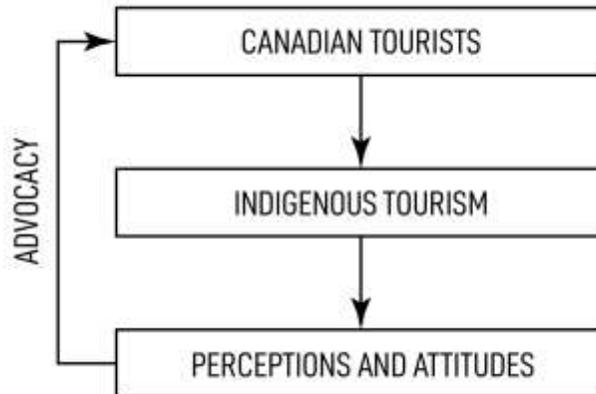
...tourism affords the opportunity to travel and to know other cultures, and that the development of tourism can help promote closer ties and peace among peoples, creating a conscience that is respectful of diversity of culture and lifestyles (World Conference on Sustainable Tourism, 1995).

Under this framework of peace through tourism, the concept of Indigenous tourism can be interpreted as a form of reconciliation because it exposes non-Indigenous Canadians to Indigenous peoples and Indigenous tourism businesses. This in turn may challenge and change tourists' preconceived ideas, perceptions and expectations of Indigenous peoples. Reconciliation through Indigenous tourism also emerged as "reconciliation tourism" in the early 2000s as part of Australia's reconciliation movement (Higgins-Desbiolles, 2003).

The literature on tourism and social identity theory support that tourism can foster an attitudinal change in tourists (Var et al., 1994). Changes in attitude are associated with advocacy behaviours as local residents become more aware and knowledgeable of nearby Indigenous tourism businesses (Schroeder, 1996). Advocacy behaviours can include word-of-mouth recommendations to an individual's social circle, including friends, family or social media (Palmer et al., 2013). To incoming tourists, the opinions of local residents can be a reliable source of knowledge about nearby attractions and activities (Crick, 2003). Hence, the attitudes and involvement of local residents toward Indigenous tourism can play an important role in the promotion efforts of incoming tourists (Nunkoo & Gursoy, 2012).

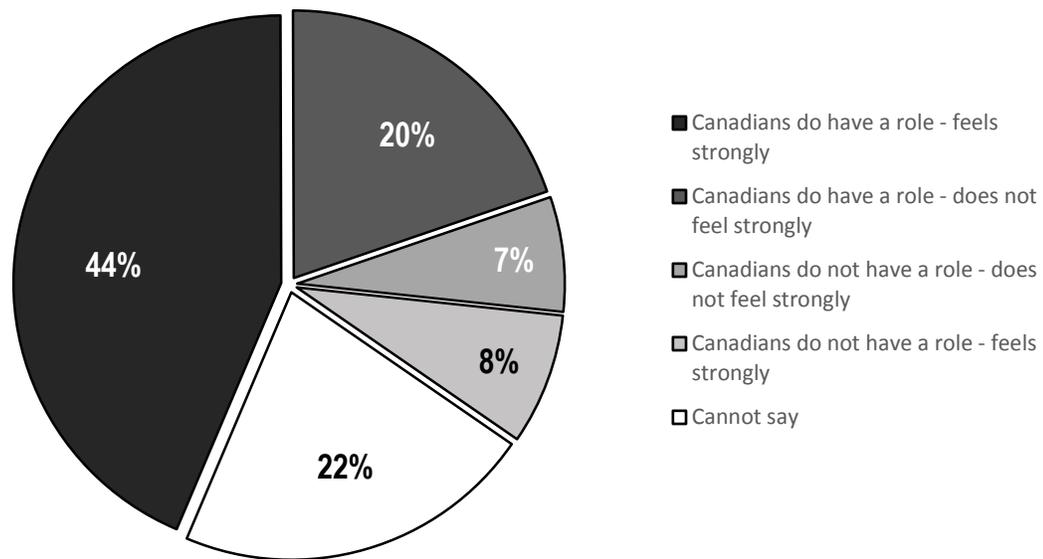
I created Figure 4 as a visual representation to illustrate the reconciliation process through participation in Indigenous tourism. Canadian tourists participate in Indigenous tourism and gain an awareness of related tourism businesses. With changed perceptions and attitudes, these participants are more likely to demonstrate advocacy behaviours that inspire other Canadian tourists to participate as well. And so, the reconciliation cycle continues.

**Figure 4 Reconciliation through Indigenous tourism (A)**



Currently, 64% of Canadians believe that individual Canadians have a role to play in reconciliation as shown in Figure 5 (Environics Institute, 2019). This statistic can be further broken down into 44% who feel strongly about it and 20% who do not feel as strongly, but still believe individuals have a role to play. Overall, this proportion of attitudes indicates a strong support for reconciliation initiatives at the individual level. This suggests a strong potential of domestic uptake in Indigenous tourism, thereby allowing for opportunities to shift public perceptions and attitudes toward Indigenous peoples and cultures.

**Figure 5**      **Role of individual Canadians in reconciliation**



Source: Environics Institute, (2019).

The current literature on Indigenous tourism are largely focused on building capacity and sustainable development, which aligns with the federal government’s strategy to invest in developing tourism products and preparing market readiness. However, there is a lack of discussion that would further our understanding on the role that Indigenous tourism can play in reconciliation. There is also a lack of research on Canada’s domestic demand for Indigenous tourism. In the next chapter, I examine the rate at which Canadians participate in Indigenous tourism in BC.

## Chapter 4.

### Low Domestic participation in BC

This chapter examines the domestic participation in Indigenous tourism in BC. Economic data are used to link fluctuations in participation and other factors. Enabling factors and constraints are explored. The impacts and danger of low domestic participation are also discussed.

#### 4.1. Examining the domestic participation in BC

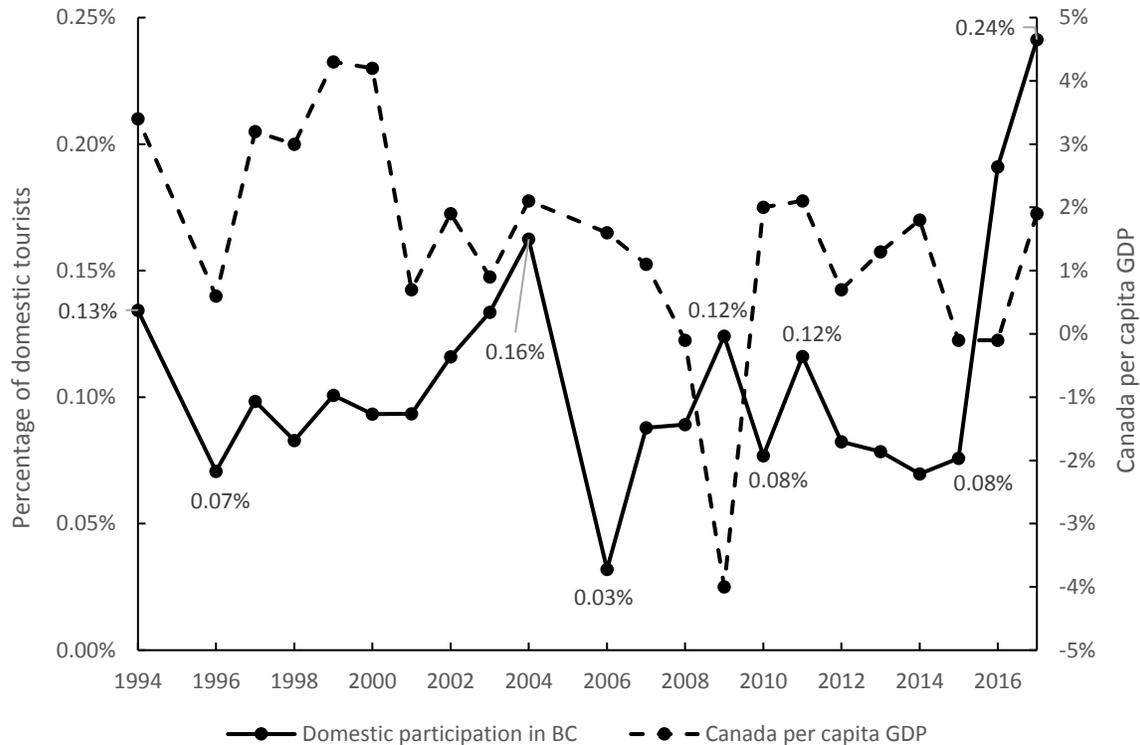
Data from two Statistics Canada surveys are used to examine domestic participation. They are the Canadian Travel Survey (1994-2004) and the Travel Survey of Residents of Canada (2006-2017). From 1994 to 2017, Indigenous tourism has remained a niche industry. In 2017, only 1% of domestic tourists had participated in Indigenous tourism.<sup>7</sup> This 1% is further broken down into 0.24% participation in BC. The remaining 0.76% was from other provinces and regions. In other words, only 0.24% of domestic tourists had participated in Indigenous tourism in BC. This 2017 statistic, as shown in Figure 6, happens to be the highest participation rate in BC between 1994 to 2017. Figure 6 also compares domestic participation with the real per capita GDP change in Canada. I conducted a linear regression analysis, with domestic participation as the dependent variable and real per capita GDP change in Canada as the independent variable. The results show no statistical relevance between the two variables.<sup>8</sup>

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<sup>7</sup> See Appendix B for full details.

<sup>8</sup> See Appendix C for full details.

**Figure 6 Percentage of Canadian tourists who participated in Indigenous tourism during their domestic trip in BC and Real per capita GDP change in Canada, 1994-2017.**



Source: Statistics (2020) from CTS (1994-2004), TSRC (2006-2017), and Table: 36-10-0222-01 Gross domestic product, expenditure-based, provincial and territorial, annual (x 1,000,000) (1994-2017).

Between 2015 and 2017, domestic participation tripled. During this time, domestic participation experienced a historic growth, from 0.08% in 2015, to 0.19% in 2016 and finally to 0.24% in 2017. However, real per capita GDP remained at -0.1% in both 2015 and 2016 before it grew to 1.9% in 2017. This aligns with the regression results that there is no statistically significant relationship between the two variables. Moreover, the rise in domestic participation post-2015 may be linked to the election in 2015 of Justin Trudeau as the Prime Minister. In other words, government policies and actions may have been an enabling factor for the growth in domestic participation between 2015 to 2017. This enabling factor is worth exploring further in future studies. Next, I discuss other enabling factors and constraints.

### **4.1.1. Awareness of Indigenous tourism**

ITBC has identified lack of awareness of Indigenous tourism experiences as a constraint. Because tourists make destination choices based on their knowledge, marketing campaigns can play a critical role in influencing the decision-making process. Despite current marketing efforts, many are still unaware of the region's diverse landscapes, cultures and experiences. Part of ITBC's marketing strategy for the domestic markets is to work with its stakeholders at all levels regionally, provincially and nationally to create better reach and impact (ITBC, 2019). ITBC's stakeholders include Indigenous tourism business and partnered organizations. For example, ITBC provides the necessary marketing training to businesses so they can create marketing materials that are tailored to their needs. However, there has yet to be a clear strategy from the macro level to understand the demographics of the domestic market.

### **4.1.2. Ease of accessibility**

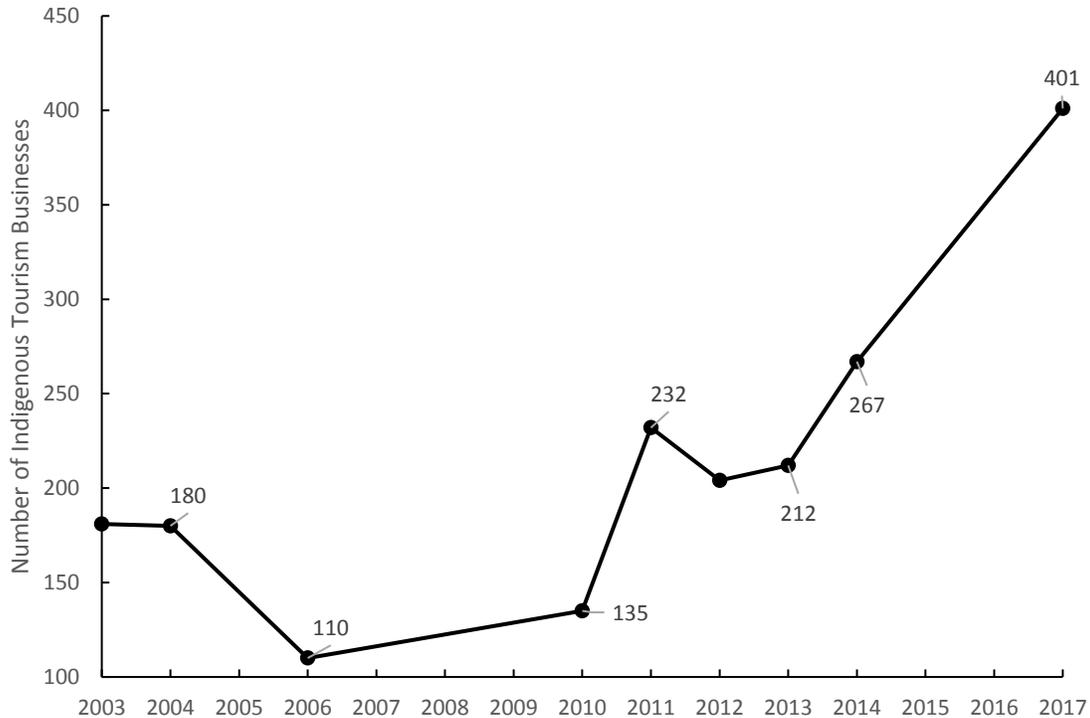
Accessibility is identified as a constraint on the sector's growth, especially for tourism products or businesses located in remote and rural areas (ATAC, 2015). Infrastructure barriers such as the lack of roads have been a challenge for accommodating tour buses and large groups. Air transportation is also restrictive due to high costs. Travelling and visiting Indigenous tourism businesses can require expensive transportation. When a domestic tourist sets a travel budget to visit an Indigenous tourism business, the same budget could instead finance a visit to another country or continent because of much lower international air fares. The high costs associated with domestic air travel drive Canadians to travel internationally rather than domestically.

### **4.1.3. Number of product offerings**

As shown in Figure 7, the most significant drop in Indigenous tourism businesses occurred between 2004 and 2006 which saw a decrease from 180 businesses to 110 businesses. For this period, the decrease in businesses aligns with the decrease in tourist participation shown in Figure 6. This suggests there may be a dependent relationship between the level of domestic participation and the number of Indigenous tourism businesses. It can be interpreted that domestic participation has a direct impact on how many Indigenous tourism businesses can be sustained. More tourists lead to the

establishment of more businesses. Fewer tourists lead to the establishment of fewer businesses.

**Figure 7** Number of Indigenous tourism businesses in BC, 2003-2017



Source: ITBC (2020) from Annual Reports (2006-2019).<sup>9</sup>

In the early 2000s, ITBC had advocated for policies to increase the number of Indigenous tourism businesses (ATBC, 2005). This led to ITBC's implementation of the Blueprint Strategy in 2006 (ATBC, 2013). Supported by the Governments of Canada and BC, the Blueprint Strategy sought to support product development and capacity building, among other initiatives. Soon after, the number of Indigenous businesses grew steadily from 2006 to 2010. From 2010 to 2011, the number of Indigenous businesses grew drastically from 135 to 232. This increase might be explained by the fact that Vancouver hosted the 2010 Winter Olympics. But this rate of growth was not sustained. From 2013 and onwards, the number of Indigenous tourism businesses saw a steady growth from 212 to 401, despite the fluctuations in the BC economy. This timing also aligns with the

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<sup>9</sup> Annual data on the number of businesses from 2003 to 2017 are not consistently available.

establishment of ITAC and its role in coordinating and promoting Indigenous tourism across Canada.

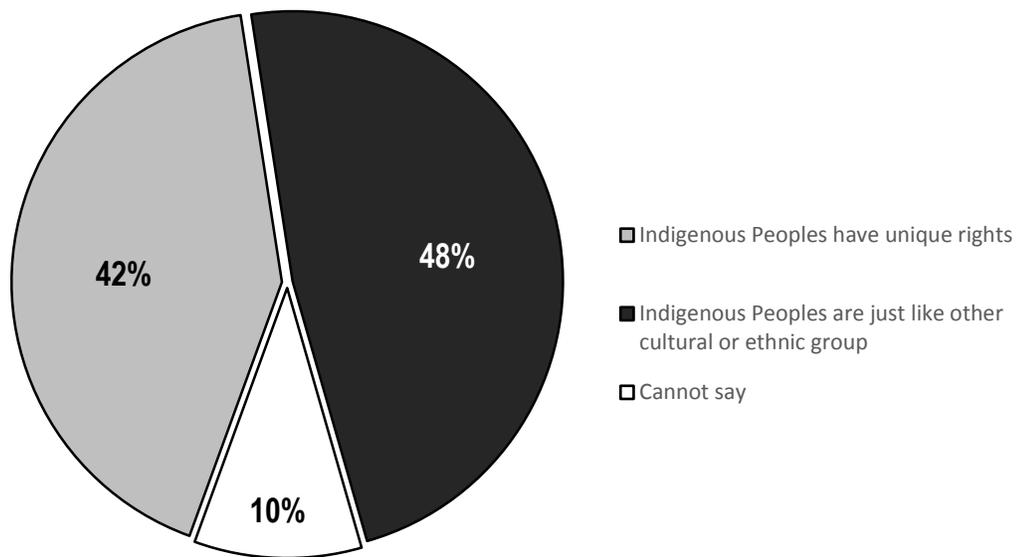
In 2019, the federal government's *Creating Middle Class Jobs: A Federal Tourism Growth Strategy* continues to invest in increasing capacity in the Indigenous tourism industry. Hence, the number of product offerings for Indigenous tourism is projected to continue to grow in the coming years. It is important to note that government policies and support have big implications on the effects on Indigenous tourism in BC.

#### **4.1.4. Perceptions and attitudes**

Canadians who participate in Indigenous tourism in BC can come from any part of the country. Hence, this section does not exclusively examine the attitudes of BC residents alone, but the overall general perspectives of the Canadian public, which includes in part the perspectives of BC residents.

Despite the entrenchment of Indigenous rights in section 35 of the *Constitution Act, 1982*, the understanding that Indigenous peoples are holders of unique rights is not understood by many non-Indigenous Canadians. In fact, Figure 8 shows that the overall Canadian perspectives are divided between those who view Indigenous peoples as the first inhabitants of this land with unique rights (42%), and the other half sees them as similar to other cultural or ethnic groups in Canada (48%) (Environics Institute, 2019). This reflects that almost half of Canadians perceive Indigenous peoples as just another ethnic group and related Indigenous tourism as just another tourism experience.

**Figure 8 Non-Indigenous perspectives on the rights of Indigenous peoples**



Source: Environics Institute, (2019).

The literature indicate the presence of a “backyard syndrome” (Ruhanen et al., 2015). This syndrome means that people do not like their “backyard”, which includes all of Canada, and instead travel abroad. This perception is a constraint which aligns with ITBC’s finding that “Canadians are not inclined to experience Aboriginal tourism products despite knowing they exist” (ATBC, 2017). Together, these perceptions and attitudes create difficulties for Canadians to advocate and promote Indigenous tourism businesses as shown in Figure 5.

## **4.2. Dangers of low domestic participation in BC**

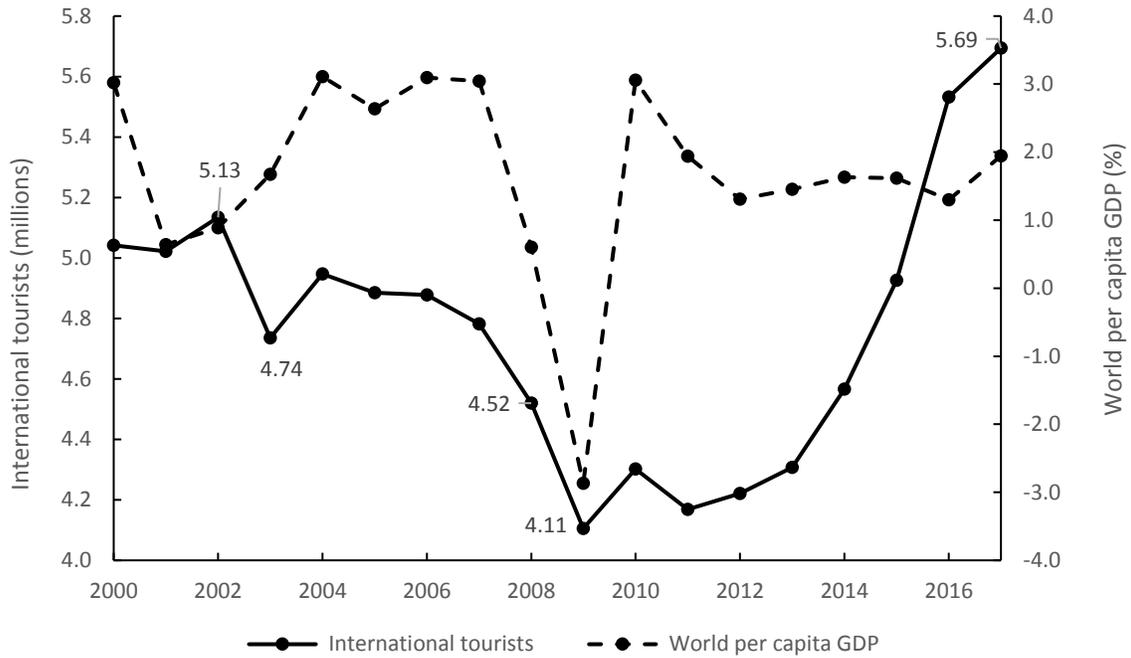
In understanding the potential dangers of low domestic participation in Indigenous tourism, I explore the international tourism market in BC. As shown in Figure 3, Canadian travelers account for only 8% of Indigenous tourism participants. The remaining 92% are from China (40%), Germany (33%), UK (19%) and US (16%). This proportion of domestic and international tourists can be detrimental on Indigenous tourism businesses in times of global events.

Figure 9 shows the number of international tourists entering BC and the world GDP per capita growth from 2000 to 2017. I conducted a linear regression analysis, with international tourists as the dependent variable and real per capita GDP change in the world as the independent variable. The results show no statistical relevance between the two variables.<sup>10</sup> During the same period, there are two notable decreases in the number of international tourists that are linked to global events such as the severe acute respiratory syndrome (SARS) epidemic in 2002 and the global recession in 2008. Around the time of SARS (2002-2003), the number of international tourists dropped from 5.13 million to 4.74 million. Similarly, around the time of the global recession (2008-2009), the number of international tourists dropped from 4.52 to 4.11 million. In determining the impact that international visitor fluctuations have on Indigenous tourism for these spans of time, there are no survey data available. According to the International Travel Survey (ITS), the earliest appearance for survey respondents to select “attend an aboriginal event” was in 2013, which also aligns with the establishment of ITAC. It is no coincident that the ITS began to collect data on international participation on Indigenous tourism in the same year that the ITAC was established to coordinate better efforts to promote the Indigenous tourism industry. As the number of Indigenous businesses continue to grow, the negative impacts may become more apparent, particularly to global events that are tied to the world economy. In addition, the coronavirus pandemic in 2020 (COVID-19) may be the largest impact on the tourism industry to date. Many Indigenous tourism businesses may be driven out of the industry. Further research should be conducted in this field as more data become available.

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<sup>10</sup> See Appendix D for full details.

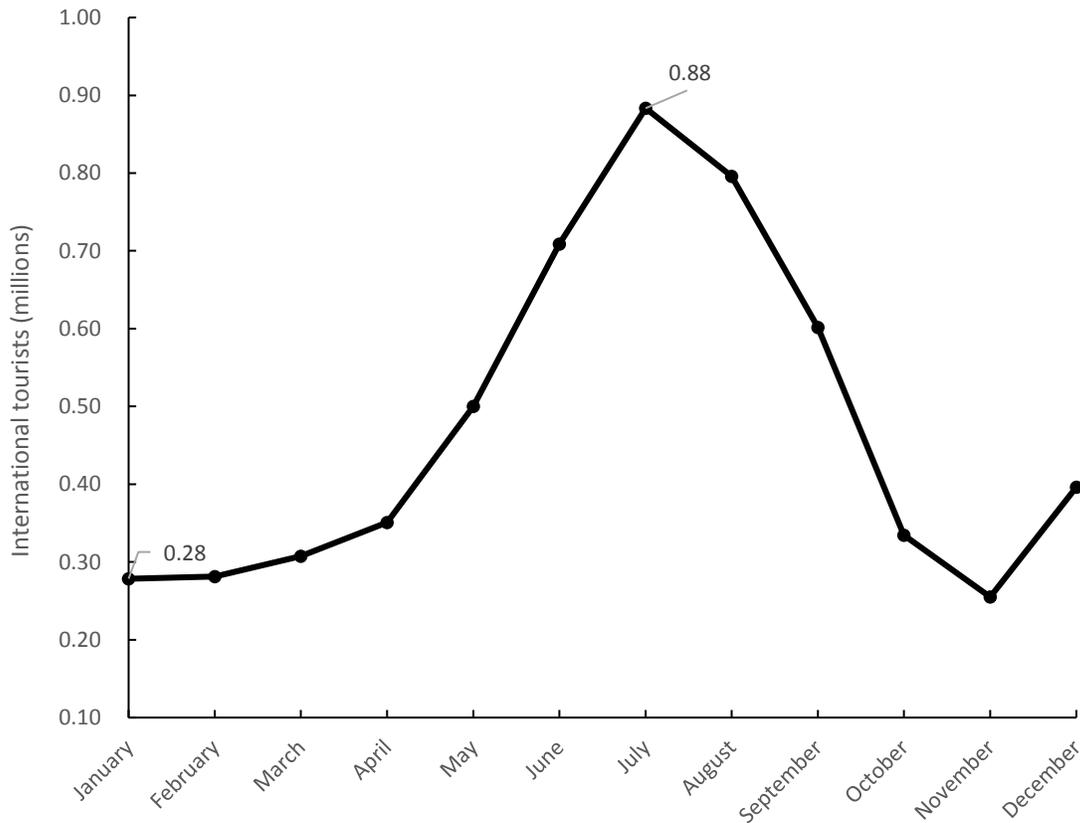
**Figure 9 International tourists entering BC and world GDP per capita change, 2000-2017**



Source: Statistics Canada (2020) from Table: 24-10-0043-01 International tourists entering or returning to Canada, by province of entry (2000-2017); World Bank (2020) from GDP per capita growth (annual %) (2000-2017).

Moreover, BC’s tourism industry is heavily influenced by seasons (DC, 2018). This is supported by Figure 10 which shows 3.5 times more international tourists arriving in BC during the summer months than in the winter months in 2017. Therefore, the utilization of international tourists to maximize revenues can only be sustained for four months of the year, from June to September. This creates a vacuum and underutilized capacity that tourism businesses will need to account for during the other eight months. This gap can potentially be filled with domestic tourists. Hence, as the number of product offerings and capacity for Indigenous tourism businesses continue to steadily increase, the level of domestic demand must also increase in similar proportion. Otherwise, the lack of domestic tourists in the Indigenous tourism sector may drive Indigenous tourism businesses out of the industry as shown in Figures 6 and 7. There may also be businesses that are set up to specifically operate during the summer months, which this capstone does not address.

**Figure 10** International tourists entering or returning to BC, 2017



Source: Statistics Canada (2020) from Table: 24-10-0043-01 International tourists entering or returning to Canada, by province of entry (2017).

I have demonstrated that government policies are important in supporting Indigenous tourism businesses and driving tourist demand. From a policy standpoint, the balance between domestic and international tourists needs to be adjusted to ensure Indigenous tourism businesses can be sustained through different economic conditions. The current domestic market needs to be further developed. Constraints need to be addressed, including increasing awareness, increasing accessibility, increasing number of product offerings and changing attitudes of non-Indigenous Canadians towards Indigenous cultures and traditions.

## **Chapter 5.**

### **Policy problem and stakeholders**

This capstone addresses the policy problem that the rate at which Canadians participate in Indigenous tourism in BC is too low. In addressing the many socio-economic challenges faced by Indigenous communities today, Indigenous tourism has been identified as a potential solution, which can create economic impacts. However, little research has been conducted on understanding the domestic demand and the opportunity for Indigenous tourism to change Canadians' perceptions and attitudes toward Indigenous peoples. This capstone addresses the gap by providing insights on the domestic demand for Indigenous tourism development in BC.

The current rate at which Canadian tourists participate in Indigenous tourism in BC remains low at 0.24%. Domestic Canadian tourists account for only 8% of total participation in Indigenous tourism in Canada, while international tourists account for the other 92%. Enabling factors or constraints that affect domestic participation include awareness of Indigenous tourism, ease of accessibility, number of product offerings and perceptions and attitudes. The problem of low domestic participation can be detrimental to Indigenous tourism businesses, especially in times of global events when the movement of international tourists are restricted. These events include SARS of 2002, global recession of 2008 and COVID-19 of 2019 to 2020. However, determining the balance between domestic and international participation in the Indigenous tourism sector can be a challenge for policy makers and Indigenous businesses when considering trade-offs between economic and social impacts.

From a policy perspective, it is important to support domestic Indigenous tourism as it is a means to reconciliation, which can foster cross-cultural understanding between Indigenous and non-Indigenous Canadians. Currently, 64% of Canadians believe that individuals have a role to play in reconciliation. This strongly suggests that if Indigenous tourism is framed as a reconciliation action, the potential for domestic Canadian participation in Indigenous tourism in BC can far exceed the current rate of participation

(0.24%).<sup>11</sup> Increased exposure to Indigenous tourism may challenge and change a tourist's perception and attitude of Indigenous peoples. This change is an important outcome in the reconciliation process. Domestic tourists are a key stakeholder and this group consists of local BC residents and other Canadian tourists. This key stakeholder is referred as the Canadian public.

Indigenous tourism businesses are the most impacted stakeholder from any policy changes. Therefore, Indigenous tourism businesses are a key stakeholder. The organization that represent Indigenous tourism interests at the provincial level is Indigenous Tourism Association of BC (ITBC). Alternatively, the Indigenous Tourism Association of Canada (ITAC) also represents Indigenous interests at the national level and helps facilitate coordination or marketing efforts between ITBC and other Indigenous tourism organizations from provinces and territories.

ITBC and ITAC are largely funded through transfer payments from governmental bodies and Crown corporations at both the federal and provincial levels. The contributed funding goes toward keeping ITBC and ITAC operations and initiatives afloat. At the provincial level, the funding organizations include the Ministry of Tourism, Arts and Culture and Destination BC (DBC). At the federal level are Crown-Indigenous Relations and Northern Affairs Canada (CIRNAC), Innovation, Science and Economic Development Canada (ISED), Western Economic Diversification Canada (WD) and Destination Canada (DC). Together, this group makes up the governmental stakeholder.

In summary, the most important stakeholders for consideration are the Canadian public and the Indigenous tourism businesses in BC as they are the groups directly impacted by policy changes geared toward reconciliation. This is followed by government bodies that provide the framework and the funding to address the policy problem. In the next chapter, two methodologies conducted on understanding domestic demand for Indigenous tourism are introduced.

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<sup>11</sup> In total, 1% of domestic tourists participate in Indigenous tourism across Canada. Participation in BC accounts for almost one quarter of this 1%, which is 0.24%. See Appendix B for full details.

## Chapter 6.

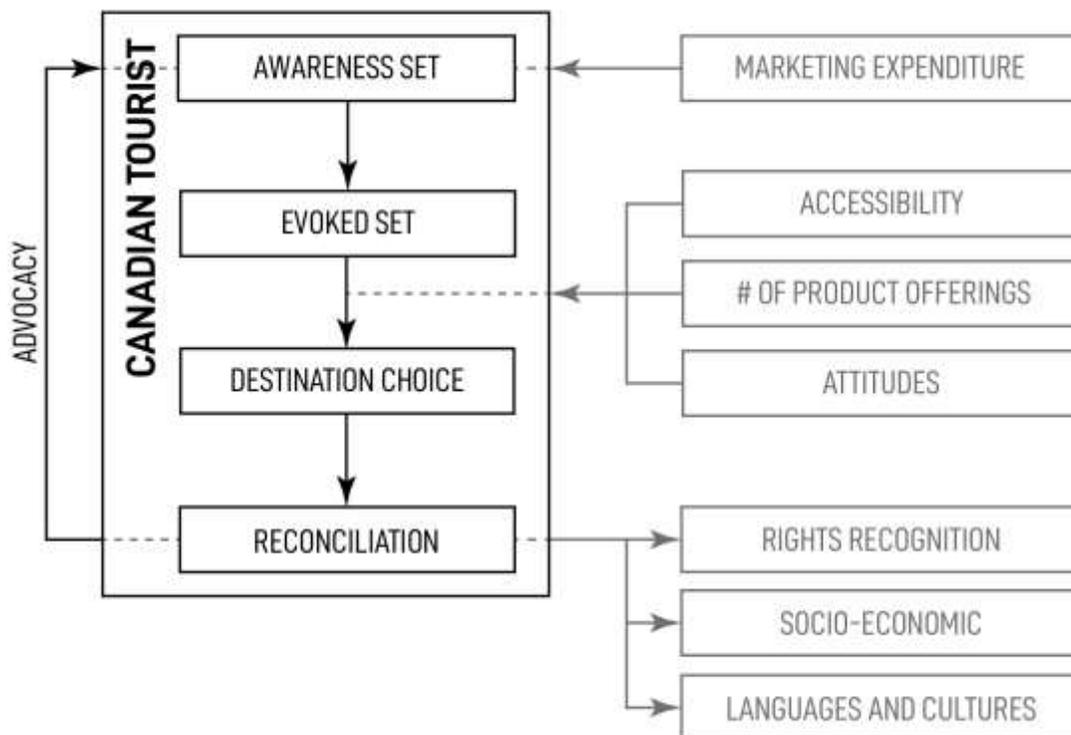
### Analytical methodology

In this study, two methodologies are used to analyze the policy problem. The primary methodology is a statistical description of the determinants of domestic participation in Indigenous tourism. The secondary methodology consists of two case studies analyses which confirm findings and results of the primary methodology.

#### 6.1. The theoretical model

To understand the low rate of domestic participation in Indigenous tourism in BC, a theoretical model is required. Borrowing the concept of a destination choice model from the literature, I created Figure 11 to illustrate Canadians' decision-making process in participating in Indigenous tourism, as well as possible reconciliation outcomes.

Figure 11 Theoretical model: Reconciliation through Indigenous tourism (B)



Note: Adapted from Um & Crompton's destination choice model (Um & Crompton, 1990).

Based on Figure 11, the decision-making process to participate in Indigenous tourism takes place in four main steps:

1. Awareness set – Initial set of destinations that a tourist is aware of.
2. Evoked set – Selection of the preferred options.
3. Final destination choice – Participation.
4. Reconciliation – Various possible outcomes.

First, individual tourists already have their general awareness of destination choices. The awareness set is the result of social interactions and marketing communications which a tourist is exposed to (Um & Crompton, 1990). One of the most influential factors determining the awareness set is interpersonal relationship (Walter & Tong, 1977). In fact, 74% of tourists receive destination information from family, friends and relatives, while 20% receive information from media channels (Gitelson & Crompton, 1983). In other words, a tourist's level of awareness is dependent on the amount of information received, either from friends and family or from media channels. This relationship is reflected in Figure 11 through *advocacy* behaviours as well as *marketing expenditure*.

Next, tourists narrow their selections to an evoked preference set of choices, from which the final destination choice is selected. The path from preferred choices to actual participation is ultimately affected by enabling factors or constraints. I have identified some of them in Chapter 4. They include accessibility, number of product offerings and attitudes among others.

The fourth and final step is where reconciliation occurs as discussed in Chapter 3.3. Through participation, Canadians gain increased awareness, understanding and appreciation for Indigenous heritage. This leads to greater recognition of Indigenous rights, improved socio-economic conditions and sustained revitalization of Indigenous languages and cultures. Lastly, through advocacy behaviours, participants influence other Canadian tourists by sharing their Indigenous tourism experience with friends, family and social media channels.

For the analytical methodologies, I only examined step 3 of the theoretical model. This is the step where Canadian tourists make the final decision to participate in

Indigenous tourism. In examining step 3, I conducted a descriptive statistics analysis and case study analysis. The overarching objective of the analyses is to obtain findings that can help inform and guide decisions in addressing the policy problem. The reason to only examine step 3 is due to the limited data that are publicly available on the other steps of the theoretical model. Data limitation was identified as a constraint during this study. With sufficient data, future research should focus on the other three steps to realize the full scope of the theoretical model.

## **6.2. Descriptive statistics**

In Chapter 3.2, I identified that the inconsistencies in Indigenous tourism enterprises since the 1990s have resulted in incomplete data on the Indigenous tourism sector. Data from two Statistics Canada surveys are used. They are the Canadian Travel Survey (1994-2004) and the Travel Survey of Residents of Canada (2006-2017).

In collecting data on Indigenous tourism, the Canadian Travel Survey (CTS) prompted “attended a native cultural event” as an option under the Group Activities section (Statistics Canada from CTS, 1996). Next, the Travel Survey of Residents of Canada (TSRC) updated the question by asking “On this trip, did you attend an aboriginal event (pow wow, performance, other)?” (Statistics Canada from TSRC, 2017). Neither survey addresses the broad range of businesses offered by Indigenous tourism sector as shown in Figure 2. In fact, festivals and events make up only 8% of Indigenous tourism businesses in BC in 2016. This reflects the perceptions of native.

Due to the limited data that are available, the CTS and TSRC are used in this methodology as the closest representation to showcase the domestic demand for Indigenous tourism in BC. With the derived survey data, this analysis is aimed to identify the evolution of domestic demand for Indigenous tourism in BC over the past decades. To illustrate this, I picked 1997, 2007 and 2017 as the three temporal points to examine further. The findings are summarized to show how domestic demand has changed over time.

### 6.3. Case studies

The first case study is a 2011 survey investigating the demand for Indigenous tourism (Mi'kmaw culture) in Nova Scotia (NS), Canada. The Mi'kmaq peoples are a group of First Nations located in Atlantic Canada with presence in Quebec, Newfoundland, Prince Edward Island, New Brunswick and NS for the past 5,000 years (Mi'kmaq Spirit, 2007). In 2016, ITAC launched its five-year plan to drive progress in the emerging Indigenous tourism sector of NS. However, domestic participation in Indigenous tourism in NS is only at 0.06% of total domestic Canadian tourism (Statistics Canada from TSRC, 2017). The findings from this case study may provide insights to the capstone's policy problem. The overall goal is to determine if there are overlapping patterns in the domestic demand between two regions (BC and NS) of Canada.

The second case study is an examination of both domestic and international demand for Indigenous tourism in Australia. For the purpose of this capstone, only data specific to Australia's domestic demand are examined. Australia has recognized its Indigenous tourism sector as a significant industry that contributes 3% of its GDP (Mahadevan, 2018). Indigenous tourism is one of four policy priorities identified in Australia's *Tourism 2020* strategy (Australian Government, 2015). However, survey data reveal only 0.7% of its domestic tourists participate in Indigenous tourism (Abascal et al, 2016). Given the similar levels of government priority and low rate of domestic participation in both Canada and Australia, this case study seeks to determine any overlapping patterns in the domestic demand between the two countries.

In summary, Table 2 indicates the two methodologies. Next to each methodology, the jurisdiction and the year of data used are listed. Compared to BC, both NS and Australia also have a high government priority but a low rate of domestic participation. Hence, they are chosen as the two case studies to be compared with the BC market. The next chapter covers the analysis of both primary and secondary methodologies.

**Table 2 Methodology summary**

<b>Methodology</b>	<b>Jurisdiction</b>	<b>Year</b>	<b>Government Priority</b>	<b>Domestic Participation</b>
Primary	BC, Canada	1997-2017	High	0.24% [2017]
Secondary	NS, Canada	2011	High	0.06% [2017]
Secondary	Australia	2013-2015	High	0.70% [2014]

Note: The domestic participation rates for BC and NS are reflected at the provincial level while the domestic participation for Australia is reflected at the national level. Domestic participation in Canada in 2017 was at 1%.

## Chapter 7.

### Analysis

This section provides analysis of descriptive statistics and case studies.

#### 7.1. Descriptive statistics analysis

From the chosen surveys, data indicate 0.10% (1997), 0.09% (2007) and 0.24% (2017) of domestic participation in Indigenous tourism in BC. These groups of participants serve as the sample size for this descriptive statistics analysis. As shown in Table 3 and Table 4, this analysis seeks to further understand the evolution of demographics and special characteristics of the survey samples.

**Table 3** Demographic characteristics of domestic participants in Indigenous tourism in BC, 1997 to 2017.

Characteristic	Group	Percentage – 1997	Percentage – 2007	Percentage – 2017
Sex	Female	66	50	60
	Male	34	50	40
Age group	18-24	5	6	6
	25-34	32	15	21
	35-44	15	15	20
	45-54	24	18	12
	55-64	12	29	21
	Over 65	12	18	20
Education level	Less than high school	10	9	7
	High school	15	21	9
	Some post-secondary	54	30	35
	University	22	41	49
Labour force	Employed	61	68	74
	Unemployed	39	32	26

Source: Statistics Canada (2020) from CTS (1997) and TSRC (2007, 2017).

Sex. Female participants are slightly more likely to be participants of Indigenous tourism than male participants. In 1997 and 2017, female participants make up approximately two-thirds of the group while male participants make up the remaining one-third. This proportion stayed consistent with the exception of a half-half split in 2007.

This suggests that although there are slight fluctuations in the proportion, sex of tourists has small influence on the participation in Indigenous tourism.

*Age group.* The youngest age group (18-24) has remained consistently low. , participation in Indigenous tourism is evenly distributed among the different age groups. In 1997, the largest group made up 32% of participants and were at age 25-34. In 2007, the largest group shifted to the 55-64 years old segment which made up 29% of participants. By 2017, the distribution had become the most evenly distributed. This suggests that Indigenous tourism had started to evolve to accommodate the interests of the different age groups.

*Education level.* The overall education level of participants increased significantly. In 1997, 54% of participants had some post-secondary while 22% had a university degree. By 2017, the proportion of participants with some post-secondary education had dropped to 35% while participants with university degree had risen to 49%. Moreover, participants with education of high school or less made up 25% in 1997, compared to 16% in 2017. This suggests that participants with higher education are becoming more likely to participate in Indigenous tourism.

*Labour force status.* The survey data indicate majority of participants are employed throughout 1997, 2007 and 2017. The proportion of participants who are employed has been steadily increasing from 61% in 1997 to 74% in 2017. For the participants who are unemployed, the opposite is true. Participants who are unemployed make up approximately one-third of all participants. This proportion indicates a stable group of unemployed tourists participating in Indigenous tourism. This also coincides with the proportion of participants who are aged 55 and above.

In Table 4, more characteristics of the domestic participants in Indigenous tourism are explored.

**Table 4 Special characteristics of domestic participants in Indigenous tourism in BC, 1997 to 2017.**

Characteristic	Group	Percentage – 1997	Percentage – 2007	Percentage – 2017
Main reason	Holidays, leisure or recreation	32	47	44
	Visit friends or relatives	29	33	43
	Business	32	12	10
	Other	7	9	3
Household income	<\$50,000 (low)	46	35	21
	\$50,000-70,000 (medium)	14	22	15
	\$70,000-100,000 (medium)	14	12	19
	\$100,000+ (high)	27	31	45
	For year 1997, see Note below.			
Province of origin	British Columbia	32	47	75
	Alberta	17	18	14
	Saskatchewan	15	6	4
	Manitoba	2	3	0
	Ontario	27	18	6
	Quebec	2	6	1
	New Brunswick	0	3	0
	Nova Scotia	2	0	0
	Prince Edward Island	0	0	0
	Newfoundland and Labrador	2	0	0
Mode of transportation	Car/truck/RV	34	56	72
	Commercial aircraft	61	24	14
	Bus	5	9	0
	Train	0	3	1
	Ship/Ferry	0	6	8
	Other	0	2	4

Note: For household income in 1997, the groups are divided into 4 different groups. In top-down order, they are: 1) <\$40,000 (low); 2) \$40,000-60,000 (med); 3) \$60,000-80,000 (med); and 4) \$80,000+ (high).  
Source: Statistics Canada (2020) from CTS (1997) and TSRC (2007, 2017).

*Main reason for participation.* In 1997, the main reasons to participate were evenly distributed among holidays at 32%, visiting friends or relatives at 29% and business at 32%. By 2017, the main reasons were dominated between holidays at 44% and visiting friends or relatives at 43%. Evidently, while 44% of participants are motivated by holiday and leisure reasons, there remains a large proportion of participants who are mainly participating during a trip to visit friends or relatives.

*Household income.* The proportion of middle-income families participating in Indigenous tourism has remained relatively consistent from 1997 to 2017. The largest shift in domestic tourist participation occurs in the low-income and high-income families.

In 1997, 46% of participants are from low-income families compared to 27% from high-income families. By 2017, this has shifted to 21% from low-income families to 45% from high-income families. This suggests that Indigenous tourism has evolved in a way such that it is more likely to attract higher-income families to participate.

*Province of origin.* Starting from the Atlantic provinces, there are little to no participation in Indigenous tourism in BC. Participation from Alberta has stayed consistent. From 1997 to 2017, Ontario and Saskatchewan which combined for 42% of participation dropped to 10%. At the same time, participation within British Columbia has increased from 32% to 75%. This suggests that the Indigenous tourism industry has increasingly become more supported by BC tourists than tourists from any other province. Distance may also play an important factor in the participation rate.

*Mode of transportation.* The biggest shift occurs in the use of private vehicles to travel compared to commercial aircraft. From 1997 to 2017, the use of private vehicles doubled from 34% to 72%. At the same time, the use of commercial aircraft dropped from 61% to 14% which is a quarter of what it used to be. This shift also coincides with the significant decrease of outer province participation. If more BC tourists are participating in Indigenous tourism activities in BC, they are more likely to use a private vehicle than to fly. Moreover, participation via bus has dropped to 0 in 2017. This may be explained through the overall drop in bus ridership in the Western provinces as announced by Greyhound's termination of its services in 2018 (CBC, 2018).

To summarize, Indigenous tourism in BC is likely to attract domestic tourists with the following characteristics:

- Age 25 and above
- University education (Bachelor's, Master's, Ph.D.)
- Main reason is either 1) holidays, leisure; or 2) visiting friends or relatives
- Household income of \$100,000 and above
- From British Columbia and Alberta
- Private vehicles as main travel method

## 7.2. Analysis of case studies

This section examines the validity of the key characteristics identified in the primary methodology by reviewing case studies from NS and Australia.

### 7.2.1. Demand for Indigenous tourism in Nova Scotia

The first study examines the demand for Indigenous tourism, particularly the Mi'kmaw culture in Nova Scotia, Canada. The study findings indicate that age group, education level and province of origin are statistically significant variables in tourist interests (Lynch et al., 2011).

*General interests.* Among the surveyed tourists, 62% agreed or strongly agreed to the following statement: "While in Nova Scotia I would be interested in visiting a Mi'kmaw cultural tourism site" (Lynch et al., 2011). This was followed by 29% who were undecided and 9% who disagreed or strongly disagreed. The 29% who were undecided may be a reflection on the lack of awareness for the Mi'kmaw culture or Indigenous tourism products, which led to their inability to decide if Indigenous tourism would be of interest to them. It also reveals that these tourists can be an ideal group for specific target marketing purposes.

*Age group.* This study identifies two main groups of tourists which consist of the younger group below 45 years old and the older group above 45 years old. In general, younger tourists are more likely to be interested in active outdoor activities while older tourists are interested in native history, tradition, arts and crafts activities (Lynch et al., 2011).

*Education level.* The study findings also indicate that existing tourism experiences that are based on cultural learning are more likely to be sought by tourists with higher education levels.

*Province of origin.* The highest interests in Mi'kmaw cultural tourism are from the Western provinces (72%), followed by Atlantic provinces (69%), Quebec (58%) and Ontario (47%) (Lynch et al., 2011). This finding suggests there may be different levels of public exposure to Indigenous tourism products among the provinces. The lack of familiarity and understanding is reported as a limiting factor for those such as Ontarians

from engaging in Indigenous tourism opportunities (Lynch et al., 2011). In addition, despite the primary methodology indicating little to no participation in Indigenous tourism in BC from the Atlantic provinces, this case study shows a high degree of interest in the Mi'kmaw tourism. Evidently, distance may have an important role in creating general awareness or interest of domestic tourists.

To summarize, Indigenous tourism in NS is likely to attract domestic tourists with the following characteristics:

- Already aware of Mi'kmaq peoples or Indigenous tourism related products
- Below age 45 for active outdoor activities
- Above age 45 for indoor cultural learning activities
- Highly educated with university degree
- From Western provinces and Atlantic provinces

### 7.2.2. Demand for Indigenous tourism in Australia

The second study examines both international and domestic demand for Indigenous tourism in Australia. Only details and findings on the domestic demand are explored further.

**Table 5** Descriptive Statistics of domestic participants in Indigenous tourism in Australia, 2013 to 2015.

Characteristic	Group	Percentage – 2013 to 2015
Sex	Female	54
	Male	46
Age group	15-24	5
	25-34	7
	35-44	15
	45-54	22
	55-64	25
	Over 65	26
Household income	<A\$50,000 (low)	25
	A\$50,000-70,000 (medium)	10
	A\$70,000-100,000 (medium)	17
	A\$100,000+ (high)	47

Source: Mahadevan, (2018).

*Sex.* Similar to the primary methodology of domestic participants in BC, this study finds that sex does not have influence on domestic participation.

*Age group.* Domestic participation is largely concentrated in the older age groups, with tourists above the age of 45 accounting for 73% of all participants. The remaining 27% consist of participants below the age of 45. This finding coincides with the two age groups identified in the Nova Scotia study. This suggests that Australia's Indigenous tourism products lack active outdoor activities. Indigenous tourism products beyond visiting a museum may be needed in order to attract the younger age groups. The study also suggests that to increase domestic participation, Indigenous-related tourism can be incorporated into the broader mainstream tourism experiences located in regional areas with high traffic flow (Mahadevan, 2018).

*Household income.* Also similar to the findings from the primary methodology, high-income families make up 47% of domestic participants in Australia. This may be explained through the age group profile. Compared to participants who are younger and starting out in their careers, participants who are above the age of 45 are more likely to be at the peak or end of their career. Hence, the larger proportion in older participants also showcase a larger proportion of tourists with higher household income.

To summarize, Indigenous tourism in Australia is likely to attract domestic tourists with the following characteristics:

- Age 45 and above
- Household income of A\$100,000 and above

## **Chapter 8.**

### **Policy objectives, criteria and options**

In the short term, the policy objective is to improve data quality and to increase the overall awareness of BC Indigenous tourism to Canadians. After awareness has been established, the long-term policy objective is to reduce barriers and encourage Canadian travelers to make the final destination choice. The key policy objective is to increase the overall rate of domestic participation in Indigenous tourism in BC.

#### **8.1. Policy criteria**

As shown in Table 6, the criteria used to assess policy options include effectiveness, equity and fairness, cost, administrative complexity and stakeholder acceptance. Each criterion is measured by scores of 3 for high value, 2 for medium value and 1 for low value. Based on the scores of each criterion, each policy option is given a total score. The highest total score indicates the most favourable policy option. Table 6 contains a summary of the criteria, definition, measurement and values. Each criterion is explained further after the table.

**Table 6 Policy criteria and measures**

Criteria	Definition	Measurement	Value
<b>Effectiveness</b>			
Increased participation	The ability of the policy to increase the rate of domestic participation in Indigenous tourism in BC.	>0.3 percent from 2017 level – High 0 – 0.3 percent from 2017 level – Med <0 percent from 2017 level – Low	High – 3 Med – 2 Low – 1
<b>Equity and Fairness</b>			
Distributional impacts	The ability of the policy to have comprehensive benefits.	Comprehensive benefits – High Somewhat broad benefits – Med Slight benefits – Low	High – 3 Med – 2 Low – 1
<b>Cost</b>			
Budgetary cost	The annual budgetary cost for the stakeholder to implement the policy.	<10 percent of 2017 level – High 10 – 20 percent of 2017 level – Med >20 percent of 2017 level – Low	High – 3 Med – 2 Low – 1
<b>Administrative Complexity</b>			
Ease of implementation	Number of organizations/agencies needed to implement the policy.	<3 agencies – High 3-4 agencies – Med >4 agencies – Low	High – 3 Med – 2 Low – 1
<b>Stakeholder Acceptance (Total score is divided by 3)</b>			
Acceptability from stakeholders	Support for the policy by the Canadian public	Very likely – High Somewhat likely – Med Not likely – Low	High – 3 Med – 2 Low – 1
	Support for the policy by Indigenous tourism businesses.	Very likely – High Somewhat likely – Med Not likely – Low	High – 3 Med – 2 Low – 1
	Support for the policy by government agencies and crown corporations.	Very likely – High Somewhat likely – Med Not likely – Low	High – 3 Med – 2 Low – 1
Total maximum score is 18			

### 8.1.1. Effectiveness

*Effectiveness* is used to measure how the policy options can increase the rate of domestic participation (currently at 0.24%). Increasing domestic participation allows the Indigenous tourism industry to be better sustained, especially during times of global events where movements of international tourists are restricted. An increase of 0.3 percent from the 2017 level is high (3); between 0 to 0.3 percent is medium (2); and less than 0 percent is low (1).

### **8.1.2. Equity and Fairness**

*Equity and fairness* refer to the ability for the policy to have distributional impacts. If there are comprehensive benefits, the policy scores high (3); somewhat broad benefits, the policy scores medium (2); and if it is slight benefits, the policy scores low (1).

### **8.1.3. Cost**

*Cost* refers to the expenditures required to implement the policy options. The implementation of policy options may result in a gain or loss of revenue for the governments or the Indigenous tourism industry. However, this is not captured as part of the cost criterion. The cost criterion only reflects the narrow costs of implementation. If the cost is lower, the more support the policy option gains. The policy option scores high (3) if it costs less than 10 percent from the 2017 budget; between 10 and 35 percent, it is considered medium and scores medium (2); lastly, if the increase is more than 35 percent, it is considered large funding and scores (1).

### **8.1.4. Administrative Complexity**

*Administrative complexity* considers the overall coordination effort that is required in order to implement the policy option. The measure is determined depending on the number of Indigenous organizations or governmental bodies that are needed. If there are two or less agencies required, the policy scores high (3); three to four agencies, the policy scores medium (2); lastly, more than four agencies would be a low score (1).

### **8.1.5. Stakeholder Acceptance**

*Stakeholder acceptance* is the support from each stakeholder towards the policy option. The main stakeholders are the Canadian public, Indigenous tourism organizations and governmental bodies. The support is measured through the likeliness in which the stakeholder will support the policy. If it is very likely, the policy scores high (3); somewhat likely, the policy scores medium (2); and if it is not likely, the policy scores low (1). This criterion has three measures. So, the total score for this criterion is divided by three to show the average score.

## 8.2. Policy options

Based on the Chapter 7 findings, three policy options are presented in this section. The short-term policies will be evaluated first, followed by the long-term policies.

### 8.2.1. Option 1: New research to focus on the domestic market

The first policy option is for Destination BC (DBC) to launch a pilot research on profiling the domestic market for Indigenous tourism in BC. It is important to note that many analyses conducted and published by DBC are based on raw data derived from Statistics Canada's TSRC and International Travel Survey (ITS). As illustrated in Chapter 3, Indigenous tourism has evolved and no longer encompasses *attending a native or aboriginal cultural event*. Yet, the TSRC's question that prompts for a response in participation in Indigenous tourism has more or less remained the same since its first appearance in the CTS of 1994. This leads to the challenge of flawed data that may not be truly representative of the domestic market. For example, a Canadian traveler stays at Skwachàys Lodge, an Indigenous themed hotel based in Vancouver which is part of the Indigenous tourism experiences ITBC offers. Based on the TSRC question, this experience would not be part of *attending an aboriginal cultural event*. Therefore, it is not Indigenous tourism.

Similar to the Court's interpretation that Indigenous rights are frozen in time, the TSRC question reveals the colonial narrative that Indigenous tourism falls strictly within the scope of cultural activities and cannot evolve. However, Indigenous tourism has evolved. So, the methodology used to collect data on an evolving Indigenous tourism industry should also reflect changes. In order to obtain data that is representative of the domestic market, this policy option calls for DBC to adopt a new approach in data collection at the provincial level.

Other jurisdictions such as Australia had recognized a similar problem. As a country, it added supplementary questions in its International Visitor Survey and National Visitor Survey of 2008 and 2009. The data from these supplementary questions led to the publication of *Indigenous tourism in Australia: Profiling the domestic market* (Tourism Research Australia, 2010). The report was Australia's first attempt to investigate and profile the domestic Indigenous tourism market. It also served as the launching piece

that initiated several subsequent studies to examine various aspects of domestic demand for Indigenous tourism. At the national level, Statistics Canada also have the option to add supplementary questions to its TRSC.

### **8.2.2. Option 2: Domestic marketing campaigns**

The second policy option focuses on Step 1 of the theoretical model (Figure 11) and calls for ITBC to create domestic marketing campaigns based on push marketing via social media channels. This policy option is targeted towards increasing the overall awareness for Indigenous tourism experiences to Canadian travelers from other provinces. With increased awareness for such tourism products, Canadian travelers are more likely to participate during their visit in BC. However, this would require ITBC to re-strategize its marketing approach which is largely focused on the international markets and training Indigenous businesses to create their own marketing content.

The Canadian public may perceive Indigenous tourism as strictly related to certain cultural activities. This is supported by the analysis finding from Chapter 7 that 84% of current participants have some post secondary education or a university degree. This indicates that Indigenous tourism is largely sought after by those who are likely to have an awareness and interest for such experiences already from their education. It also reveals there is a potential gap in the domestic market that can be targeted. This gap is the sector of tourists who do not have a prior awareness or are otherwise actively seeking for an Indigenous tourism experience. This creates an optimal condition for push marketing to be applied.

Push marketing, also known as direct marketing, is a form of advertising primarily used to push information to customers to increase demand. Through social media channels, push marketing can be utilized to advertise for the increasing number of Indigenous tourism businesses in BC. This creates greater awareness to potential participants who may not have the education level needed to seek out these experiences, especially during times of global events and winter seasons. Domestic marketing campaigns will also help clear the misconception that Indigenous tourism only encompass cultural activities. The next steps are to identify the target groups and push targeted advertisements toward them. With a strategic domestic marketing campaign,

ITBC will be better positioned to attract and exceed the expectations of Canadian travelers.

### **8.2.3. Option 3: Tax credit for participation in Indigenous tourism**

The third policy option encourages domestic tourists to transition from Step 2 to Step 3 of the theoretical model (Figure 11). It involves creating a tax credit for domestic participation in Indigenous tourism in BC, which lowers the overall costs for tourists. This policy option is motivated by findings from Chapter 7.1. The findings reveal that Indigenous tourism in BC has become predominantly supported by BC residents who transport by private vehicles. This phenomenon can be explained by the high costs associated with domestic travel. Therefore, high travel costs discourage tourists from other provinces to participate in BC's tourism products, including Indigenous tourism.

This policy option also considers the state of Canada's tourism industry post COVID-19. This pandemic has negatively impacted the tourism industry, including the Indigenous tourism sector. As a result, many of these businesses are at risk of shutting down. The sector can no longer rely on international tourists as a means to sustain itself. Therefore, the focus of government policies should shift from building capacity to stimulating domestic participation. This tax credit is one method the government can support the sector by inducing more participation.

There are currently 401 BC Indigenous tourism businesses registered under ITBC (Figure 7). Domestic tourists who participate or attend these certified Indigenous tourism businesses are eligible for the tax credit. The amount of the tax credit would require the federal and provincial governments to determine how much total funding can be invested to stimulate the domestic demand for Indigenous tourism in BC.

## Chapter 9.

### Evaluation of Policy Options

Each policy is evaluated below based on the defined criteria.

#### 9.1. Evaluation of Option 1: New research to focus on the domestic market

Regarding effectiveness, this policy option provides a new approach in data collection which improves data accuracy in reflecting the domestic demand. The TSRC data from Statistics Canada indicate 0.24% is the rate of participation in BC. But this data only represent Festival and Events, which account for 8% of the industry in BC (Figure 2). The data do not account for participation in the other 92% of the industry. Hence, this policy option seeks to capture participation in all sectors of the Indigenous tourism industry (Figure 2). This policy option will see an immediate rise in the rate of domestic participation as a result of including participation from the other 92% of the industry. Domestic tourists are already participating in Indigenous tourism that is outside the scope of Festival and Events. In addition, the new data can be used by the federal and provincial governments to support other policy options such as marketing campaigns, which is likely to happen due to the governments' commitment to reconciliation. The score is 3.

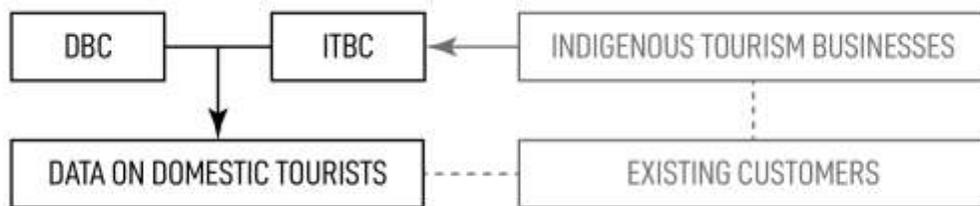
In terms of equity and fairness, the distributional impact is comprehensive. For ITBC and Indigenous tourism businesses, the improved data will help decision-makers make more strategic choices in allocation of funds to enhance efforts in promoting Indigenous tourism. If successful, this policy option can be shared to generate bigger discussions between Indigenous tourism stakeholders and government agencies from other provinces and regions on best practices to collect data. This can result in better information sharing and coordination between regions. The score is 3.

The costs to launch this pilot study are associated with payroll in the human resources department. This policy option would require a new team to be assembled to work with Indigenous tourism businesses across the six tourism regions in BC.

Depending on DBC's current capacity, it may cost between 10 to 20% of DBC's 2017 annual budget. The score is 2.

From the administrative standpoint, this policy option requires 2 agencies. As shown in Figure 13, since many BC Indigenous tourism businesses are represented by ITBC, DBC can work with ITBC in determining the best method to obtain data on domestic tourists. In this case, the domestic tourists are already customers of the businesses. The score is 3.

**Figure 12 Framework to profiling the domestic market**



In terms of stakeholder acceptance, the Canadian public may not have a strong opinion on this policy option. So their score is 2. The Indigenous businesses will strongly support this policy option because it can greatly improve current understanding of the domestic demand. So their score is 3. The government agencies will also have a somewhat neutral approach. While they are committed to promoting and encouraging Indigenous tourism as a key tourism product, this policy option requires additional annual funding in order to be implemented. So their score is 2. The final average score is 2.3.

## 9.2. Evaluation of Option 2: Domestic marketing campaigns

Regarding effectiveness, this policy option provides a clear strategy to target different market sectors to raise the overall awareness of Indigenous tourism products. As discussed in Chapter 4, 64% of Canadians believe individuals have a role to play in reconciliation. Hence, if Indigenous tourism is marketed as a reconciliation action, the rate of participation should far exceed the current indication of 0.24%. The result of this policy option will likely see an addition of participation level between 0 to 0.3%. The score is 2.

In terms of equity and fairness, the distributional impacts have somewhat broad benefits. Through push marketing, Indigenous tourism products can be introduced to various demographic groups, including those who may not be actively seeking out such experiences. However, push marketing is targeted towards specific demographic groups. With limited funding, strategic decisions will be made to determine which groups would generate the most value for the Indigenous tourism industry. Hence, not everyone can be targeted. The score is 2.

The costs ITBC incur from its marketing initiatives account for 33% of its annual budget. Within this 33%, ITBC's marketing initiatives include launching a mobile friendly website, launching the Authentic Indigenous designation program, attending international trade shows and reaching out to the travel media. International trade shows have been rendered ineffective by the COVID-19 pandemic. So, the costs for this policy option would likely be absorbed by the funding for international trade shows. The amount of funding would exceed more than 20% than the 2017 level for domestic marketing. The score is 1.

From the administrative standpoint, this policy option may require 3 to 4 agencies. The creation of marketing content will be conducted by ITBC and its businesses. To promote the marketing content, ITBC will work with other agencies to leverage existing media channels to get the word out. These agencies include DBC for the provincial markets and ITAC to coordinate marketing efforts with Indigenous tourism organizations from other provinces and regions. The score is 2.

In terms of stakeholder acceptance, the Canadian public may not have a strong opinion on seeing more advertisements. Their score is 2. For Indigenous tourism businesses and ITBC, it is very likely this policy option will be supported. Their score is 3. For governmental agencies, their perspective is to generate the best value with the limited marketing dollars. On average, international tourists spend more than domestic tourists. Therefore, there may be more value to attract international tourists rather than domestic tourists. But with COVID-19, this may not be the case. Their score is 2. The final average score is 2.3.

### **9.3. Evaluation of Option 3: Tax credit for participation in Indigenous tourism**

Regarding effectiveness, the tax credit reduces the overall costs of participation in Indigenous tourism in BC. Depending on the tax credit amount, this policy option can have a high impact on inducing domestic participation. The score is 3.

In terms of equity and fairness, this policy option has comprehensive benefits. Through the tax credit, any Canadian who participates in Indigenous tourism in BC are eligible to receive the benefit of the tax credit. If successful, this policy option can be replicated in other provinces and territories to induce domestic participation. The score is 3.

The costs to implement this policy option are associated with payroll in the human resources department. ISED has the mandate to promote Indigenous tourism. Hence, this policy option is mostly likely to be spearheaded by ISED's Tourism Branch. Depending on the Tourism Branch's capacity, a new team may need to be assembled to lead this policy option. This can cost 10 to 20% of the Tourism Branch's annual budget. The score is 2.

From the administrative standpoint, the overall complexity of this policy option will be high, involving more than 4 agencies. They include ISED, the Canada Revenue Agency (CRA), ITBC, ITAC and other stakeholders such as think tanks, academic and consultant experts. They will determine the feasibility of this policy option. Coordination logistics will also need to be developed between the stakeholders for distributing the tax credit to the domestic tourists. The score is 1.

In terms of stakeholder acceptance, both the Canadian public and Indigenous tourism organizations are very likely to support this policy option. The tax credit would increase the likelihood of Canadian tourists to consider Indigenous tourism offerings during their domestic travels. The scores for the Canadian public and Indigenous tourism organizations are both 3. For the governmental agencies, this policy option may be complex to implement. The score for governmental agencies is 2. The average score for this criterion is 2.7.

**Table 7 Evaluation of Policy Options**

Criteria	Option 1	Option 2	Option 3
	New research on domestic market	Domestic marketing campaigns	Tax credit for participation in Indigenous tourism
<b>Effectiveness</b>			
Increased participation	High (3)	Medium (2)	High (3)
<b>Equity and Fairness</b>			
Distributional impacts	High (3)	Medium (2)	High (3)
<b>Cost</b>			
Budgetary cost	Medium (2)	Low (1)	Medium (2)
<b>Administrative Complexity</b>			
Ease of implementation	High (3)	Medium (2)	Low (1)
<b>Stakeholder Acceptance</b>			
Acceptability among Canadian public	Medium (2)	Medium (2)	High (3)
Acceptability among Indigenous organizations	High (3)	High (3)	High (3)
Acceptability among government agencies	Medium (2)	Medium (2)	Medium (2)
Overall acceptability	Medium (2.3)	Medium (2.3)	Medium (2.7)
<b>Total Score</b>			
Score	13.3/15	9.3/15	11.7/15

## 9.4. Recommendation

The recommendation is to immediately implement the first policy option, which calls for new research to focus on the domestic demand for Indigenous tourism in BC. Out of the three policy options, this policy scores the highest in effectiveness and cost, which makes it the most cost-effective. Improving the quality of data and building a domestic profile for the Indigenous tourism market can play a crucial role in providing decision-makers key insights based on evidence and analysis. But in order for evidence-based policies to be developed, policymakers will require data that are representative of an evolving Indigenous tourism industry.

This policy option also scores the highest in administrative complexity as it only requires 2 agencies. To demonstrate the provincial government's commitment to

reconciliation, DBC will need to consult with ITBC on how the data collection process should proceed. This would ensure that ITBC has the opportunity to partake in the design of the development process. From a project management perspective, this will also allow ITBC and its businesses to contribute perspectives that may have been missed by DBC. The end result will be a comprehensive data collection method that works for ITBC. Another implementation consideration is obtaining consent to collect and to use customer data. Privacy policies may need to be developed or adjusted to ensure the process is transparent to the customers.

When all three policy options are compared, it is important to note that the third policy option would not be as effective without the implementation of the second policy option. Similarly, the second policy option would not be as effective without the implementation of the first policy option. Hence, the first policy option is recommended be implemented first. With improved data, the first policy option can provide insights into the implementation of other policy options such as marketing campaigns, introducing the tax credit and so on. The second recommendation is to launch the domestic marketing campaigns which will promote the public narrative that Indigenous tourism is evolving and can exceed the expectations of domestic tourists. In the long-term, the third policy option can be considered for implementation to further reduce travel barriers and increase domestic participation in a post COVID-19 environment.

## **Chapter 10.**

### **Conclusion**

In this capstone, I examined a history of government policies that negatively affected the Indigenous population. As part of reconciliation, I demonstrated some of the government initiatives that are now taking place to address the many socio-economic challenges faced by Indigenous communities. Of the many guises of reconciliation, I introduced Indigenous tourism as a vehicle of and a form of reconciliation.

In order to promote domestic participation in Indigenous tourism in BC, a few constraints have been identified. They include low awareness for Indigenous tourism product offerings, accessibility issues and certain attitudes towards Indigenous peoples and cultures. Quantitative data derived from Statistics Canada's CTS and TSRC was used to build a preliminary profile on the demand for Indigenous tourism in BC for the years 1997, 2007 and 2017. The key findings indicate that current participants are likely to have high levels of household income and education. I then conducted case studies from Nova Scotia and Australia which confirmed similar results. Based on these findings, I evaluated three policy options and conclude that a new pilot study will need to be launched to further our understanding of the domestic demand for Indigenous tourism in BC. In addition, domestic marketing campaigns are also recommended to increase overall awareness for related tourism products.

As mentioned previously, the scope of this capstone is limited to providing an initial discussion on understanding the domestic demand for Indigenous tourism in BC. This capstone has provided a macro view of domestic demand for BC's Indigenous tourism market. Future research should investigate specific tourism experiences. Of the seven categories of Indigenous tourism businesses, the Food and Beverage sector may attract a different demographic group than the other six sectors identified in Figure 2. With sufficient time and resources, the primary methodology of this capstone can be replicated to explore the domestic demand for Indigenous tourism in other provinces and territories. Lastly, with additional data such as marketing expenditure, transportation costs or public perceptions, Steps 1, 2 and 4 of the theoretical model (Figure 11) can be studied further.

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## Appendix A.

### Six principles of the Larrakia Declaration

**Table 9. Six principles of the Larrakia Declaration**

Respect	Respect for customary law and lore, land and water, traditional knowledge, traditional cultural expressions, cultural heritage that will underpin all tourism decisions respect, protection, participation, consultation, tradition and partnerships
Protection	Indigenous culture and the land and waters on which it is based, will be protected and promoted through well managed tourism practices and appropriate interpretation.
Participation	Indigenous peoples will determine the extent and nature and organizational arrangements for their participation in tourism and that governments and multilateral agencies will support the empowerment of Indigenous people.
Consultation	Governments have a duty to consult and accommodate Indigenous peoples before undertaking decisions on public policy and programs designed to foster the development of Indigenous tourism.
Tradition	The tourism industry will respect Indigenous intellectual property rights, cultures and traditional practices, the need for sustainable and equitable business partnerships and the proper care of the environment and communities that support them.
Partnerships	That equitable partnerships between the tourism industry and Indigenous people will include the sharing of cultural awareness and skills development which support the wellbeing of communities and enable enhancement of individual livelihoods.

Source: UNWTO, (2012).

## Appendix B.

### Percentage of Canadian travelers who participated in Indigenous tourism during their domestic trip in Canada, 2017.

**Table 10. Percentage of Canadian travelers who participated in Indigenous tourism during their domestic trip in Canada, 2017.**

<b>Location</b>	<b>Participation</b>
<b>British Columbia</b>	<b>0.241%</b>
Ontario	0.216%
Alberta	0.135%
Saskatchewan	0.125%
Quebec	0.113%
Manitoba	0.071%
Nova Scotia	0.061%
Newfoundland	0.042%
Yukon	0.010%
Prince Edward Island	0.010%
New Brunswick	0.009%
Nunavut	0.007%
Northwest Territories	0.003%
<b>Canada (total)</b>	<b>1.000%</b>

Source: Statistics Canada (2020) from TSRC (2017).

## Appendix C.

### Regression between domestic participation in Indigenous tourism in BC and real per capita change in Canada, 1994-2017.

<i>Regression Statistics</i>	
Multiple R	0.047654
R Square	0.002271
Adjusted R Square	-0.04762
Standard Error	0.000466
Observations	22

ANOVA					
	<i>df</i>	<i>SS</i>	<i>MS</i>	<i>F</i>	<i>Significance F</i>
Regression	1	9.87E-09	9.87E-09	0.045521	0.833208
Residual	20	4.33E-06	2.17E-07		
Total	21	4.34E-06			

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Lower 95%</i>	<i>Upper 95%</i>	<i>Lower 95.0%</i>	<i>Upper 95.0%</i>
Intercept	0.001086	0.000131	8.323106	6.29E-08	0.000814	0.001359	0.000814	0.001359
Canada per capita GDP	-0.00122	0.005738	-0.21336	<b>0.833208</b>	-0.01319	0.010744	-0.01319	0.010744

## Appendix D.

### Regression between international arrivals in BC and real per capita change in the world, 2000-2017.

<i>Regression Statistics</i>	
Multiple R	0.284911
R Square	0.081174
Adjusted R Square	0.023747
Standard Error	0.44363
Observations	18

ANOVA					
	<i>df</i>	<i>SS</i>	<i>MS</i>	<i>F</i>	<i>Significance F</i>
Regression	1	0.278193	0.278193	1.413527	0.251818
Residual	16	3.148924	0.196808		
Total	17	3.427117			

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Lower 95%</i>	<i>Upper 95%</i>	<i>Lower 95.0%</i>	<i>Upper 95.0%</i>
Intercept	4.614819	0.163884	28.159	4.64E-15	4.2674	4.962239	4.2674	4.962239
World per capita GDP	0.089732	0.075473	1.188918	<b>0.251818</b>	-0.07026	0.249728	-0.0703	0.249728