

ABORIGINAL TOURISM ENGAGEMENT STRATEGY FINAL REPORT

MARCH, 2010

**PREPARED BY
NORTHWAYS CONSULTING**

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1. EXECUTIVE SUMMARY

Tourism is a vibrant and important sector of the NWT economy. It is one of the oldest and most established industries in the NWT. However, it is a very challenging industry that requires a significant amount of commitment, professionalism and technical competence in a diverse range of areas. Many of those in the tourism industry do it for the lifestyle, rather than the expectation of significant returns.

Nahanni National Park



While the overall tourism industry is well established, Aboriginal tourism is at the very early stages of development. In order to research this industry further, the Department of Industry, Tourism and Investment contracted NorthWays Consulting to conduct the Aboriginal Tourism Engagement Strategy. The purpose of the strategy is to determine whether there is an interest in developing an Aboriginal Tourism Strategy and, if so, what the components of the strategy should be.

The NorthWays Consulting Project Team conducted the project by completing research on Aboriginal/cultural industries in other jurisdictions; distributing and compiling surveys; and holding consultation sessions in each of the regional centres.

The primary results of the project show that there is considerable interest in developing the Aboriginal tourism industry and that such an industry could have significant economic, community development and cultural value. Many respondents felt that the greatest value of the Aboriginal tourism industry may be in reinvigorating a sense of pride in Aboriginal culture and traditions.

In order to develop the industry, there is a critical need to establish a phased and strategic approach. The phases for Aboriginal tourism development should include:

1. identifying a Lead Organization or Agency
2. developing an Aboriginal Tourism Strategy
3. developing the Aboriginal tourism industry
4. building human resources and business capacity
5. developing Aboriginal tourism products, and
6. marketing Aboriginal tourism.

Implementing such an approach will require significant time and resources. However, the results will be a strong and viable Aboriginal tourism sector that adds significant value at the territorial, regional and community level.

2. PROJECT OVERVIEW

Tourism is a key sector of the Northwest Territories economy.

The tourism industry contributes more than \$130 million annually to the NWT economy. This is more than all other renewable resource sectors combined. Tourism generates hundreds of jobs and dozens of business opportunities.

Unlike the non-renewable resource sector, tourism is not region specific. All regions across the NWT can benefit from the development of the tourism industry. Tourism is also sustainable over the long term as it is not dependent on a resource that will be depleted over a period of time.

A significant proportion of the revenues generated through tourism remain in the local community. As more Northerners in general, and Aboriginal companies and individuals in particular, become involved in the tourism industry, an even greater percentage of revenues will remain in the NWT and provide additional benefits to Northern communities, families and individuals.

Just as important is the fact that Aboriginal tourism can be used to reinvigorate and reinforce Aboriginal cultures and traditions. By sharing cultures and traditions with visitors, Aboriginal peoples have the opportunity to learn more about, and practice, their own culture. There is significant value in training Aboriginal people, and particularly youth, about their own traditions so they can provide authentic experiences to tourists.

While tourism is a well established industry in the NWT, Aboriginal tourism is in its infancy. At this point, Aboriginal/Cultural tourism is not recognized as a sector of the tourism industry in the NWT. There are few examples of successful “Aboriginal tourism businesses” and no dedicated supports and resources for the Aboriginal tourism sector.

In order to establish and develop Aboriginal tourism as a viable sector of the overall tourism industry, it is essential to gain an understanding of what Aboriginal tourism is, and the steps required to take it from a fledgling industry to a fully developed and successful business sector.

The Aboriginal Tourism Engagement Strategy provides the basis for understanding the possibilities of Aboriginal Tourism and developing a multi-year strategy for developing the industry.

The genesis for the Aboriginal Tourism Engagement Strategy is the Government of the Northwest Territories, (GNWT) *Tourism 2010: A Tourism Plan for the Northwest Territories*. Tourism 2010 outlined the steps the GNWT will take to address such issues as:

- tourism marketing
- product development
- infrastructure
- tourism training, and
- research.

As part of the product development initiative, the Department of Industry, Tourism and Investment (ITI) committed to working with Aboriginal organizations, the tourism industry and other stakeholders to develop the Aboriginal Tourism Engagement Strategy.

The objectives of the Strategy are to bring together Aboriginal organizations, the tourism industry, land claims and self-government organizations, band councils and other stakeholders through a comprehensive consultation process to hold discussions on:

- the benefits of tourism
- barriers to developing tourism businesses
- trends in Aboriginal tourism
- obstacles and barriers to product development, and
- new or expanded markets that could be targeted.

The overall purpose of the Aboriginal Tourism Engagement Strategy is to determine:

- (i) whether there is an interest in developing a multi-year Aboriginal Tourism Strategy on the part of stakeholders, and
- (ii) if there is an interest in developing a strategy, what the components of the strategy will be.

The Aboriginal Tourism Engagement Strategy Final Report is the culmination of these consultations as well as comprehensive background research, consultations with external organizations and a survey of stakeholders.

The results of the Strategy demonstrate that there is significant interest in developing the Aboriginal tourism industry across the NWT and that there are significant benefits that could result from such an industry. These benefits include generating business and employment opportunities and improving economic conditions at the local, regional and territorial level.

Even more important for most of those consulted through this process, the industry represents an opportunity for Aboriginal people to learn, participate in, share and maintain traditional activities and pass these on to the youth in the communities.

The results also show that there are significant challenges to developing the Aboriginal tourism sector. A constant message through the consultation process was that the sector is at “square one”.

The Canol Trail



There is a need for a strategic and phased approach to developing the Aboriginal tourism industry. Many of the participants in the consultation process focused on the need for increased marketing initiatives. However, it is the finding of this analysis that, while there are a few market-ready Aboriginal tourism products, for the most part the Aboriginal tourism sector is not ready for a full fledged marketing program.

It is the strong recommendation of the Project Team that developing the Aboriginal tourism sector take place through a phased and strategic approach that includes:

1. identifying a Lead Organization or Agency
2. developing an Aboriginal Tourism Strategy
3. developing the Aboriginal Tourism Industry
4. building human resources and business capacity
5. developing Aboriginal tourism products, and
6. marketing Aboriginal tourism.

By going through these phases, it will be possible to establish a sound tourism industry that can be successfully marketed at the national and international level and, more importantly, effectively respond to the expectations of the highly competitive national and international tourism market.

It will take time and considerable resources and support to develop the industry. However, the returns from an economic, community economic development and cultural value perspective could be substantial. By following the recommendations contained in this report, it is the authors' belief that over time the Aboriginal tourism sector can become a viable and highly valued sector of the NWT economy.

3. PROJECT METHODOLOGY

The Project Team used a variety of research methodologies in a phased approach to gather the information to complete the Aboriginal Tourism Engagement Strategy. The methodologies included comprehensive background research and a literature review; surveys with key stakeholders; and a series of consultation sessions across the NWT. Following a brief description of the Project Team as well as the methodologies used to complete the project.

3.1 PROJECT TEAM

NorthWays Consulting of Yellowknife was contracted to complete the Aboriginal Tourism Engagement Strategy. The Project Team members are Allan Twissell and Kelly Kaylo.

Allan Twissell has worked extensively with First Nations, band and community governments, the federal and territorial governments and various private sector industries in the Northwest Territories. He has been the lead consultant for the development of numerous strategic plans and program and service reviews and evaluations. Allan has significant experience and proven expertise in the development and implementation of a variety of research methodologies including developing survey instruments, facilitating consultation sessions and analyzing research and survey results.

For the past 25 years, Kelly Kaylo has worked in the NWT tourism and travel industry providing effective leadership in the successful development and implementation of business strategies that have resulted in strong fiscal performance in extremely competitive industries.

Kelly has an in-depth understanding of the tourism industry including its challenges and opportunities. She has worked directly and indirectly with all stakeholders - including land claims and self-government organizations, tour operators, transportation suppliers and the accommodation sector – in the development and marketing of tourism products and packages. For 15 years, Kelly has worked with two land claim organizations at a senior level and has been responsible for revenue generation and contributing to shareholder wealth with a northern airline.

3.2 PROJECT METHODOLOGIES

3.2.1 BACKGROUND RESEARCH AND LITERATURE REVIEW

The Project Team conducted background research that included contacting GNWT representatives, key tourism industry representatives and other stakeholders to gain a basic understanding of current tourism projects and initiatives as well as challenges and barriers to Aboriginal tourism development.

A key element of the background research phase was to contact tourism and Aboriginal representatives from other jurisdictions to identify opportunities, best practices and barriers to tourism in other regions. This included contacting representatives from Aboriginal Tourism Canada, the Canadian Tourism Commission, the Tourism Industry Association of Canada, the Aboriginal Tourism Association of British Columbia and successful Aboriginal tourism operators.

This phase also consisted of researching and analyzing various documents and research reports provided by ITI and other stakeholders including *Tourism 2010: A Tourism Plan for the Northwest Territories*.

3.2.2 SURVEYS

An Aboriginal Tourism Engagement Strategy survey instrument was developed to gather information from a range of respondents including First Nations, government and industry representatives. Surveys were sent to Aboriginal organizations, land claims and self-government organizations, band councils, tourism operators, municipalities and other stakeholders.

The survey instrument was used to determine current tourism initiatives; successes in the tourism industry; barriers and challenges to Aboriginal tourism in the NWT; opportunities for Aboriginal tourism; and other information as determined by the Project Manager and Project Team.

The survey was also be used to determine interest in attending Regional Consultation Sessions and an Aboriginal Tourism Leadership Forum. Surveys were distributed to

approximately 150 stakeholders with 28 responses. A copy of the survey instrument has been included as Appendix B.

3.2.3 REGIONAL CONSULTATION SESSIONS

The Project Team conducted Regional Consultation Sessions in the communities of Fort Smith, Fort Simpson, Norman Wells, Inuvik and Yellowknife.

The purpose of the sessions was to hold in-person meetings and focus group sessions with Aboriginal organizations, land claims and self-government organizations, band councils, tourism industry representatives, regional ITI representatives, representatives of other related industries (i.e. arts and crafts) and other stakeholders. Topics of discussion included:

- interest in Aboriginal tourism
- successes in tourism within the region
- barriers and challenges to tourism on a regional and territorial basis
- regional opportunities for Aboriginal tourism development
- new or enhanced products that could be offered within the region, and
- other matters of interest/issues as identified through the research and survey phases of the project.

Through the Regional Consultation Sessions, the Project Team gained a thorough understanding of the successes, barriers, challenges and opportunities for Aboriginal tourism on a regional and territorial basis.

A copy of the Regional Consultation Questionnaire has been included as Appendix C. A Summary Report and list of attendees for each region has been included as Appendix D.

Northern Drum Dance



Through these processes, the Project Team was able to gather and analyze the information required to determine the current status of Aboriginal tourism in the NWT as well as to develop a series of recommendations to help foster the industry to become a viable sector of the NWT economy.

4. TOURISM INDUSTRY OVERVIEW

Tourism is a global industry. As a result, the tourism industry in the NWT must compete on a national and international level. In order to effectively compete at this level, it is critical to have a basic understanding of tourism and the challenges that tourism operators face.

4.1 CURRENT TOURISM STATUS

4.1.1 GLOBAL AND NATIONAL TOURISM

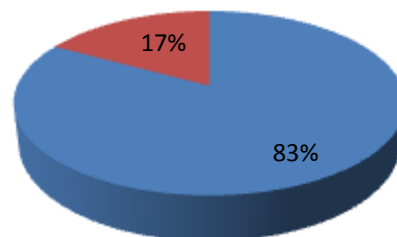
The tourism industry worldwide continues to face many challenges, and is greatly influenced by external economic conditions. Tourism expenditures are discretionary – during periods of economic expansion, spending on tourism tends to increase, while tourism spending decreases significantly when the economy is not performing well.

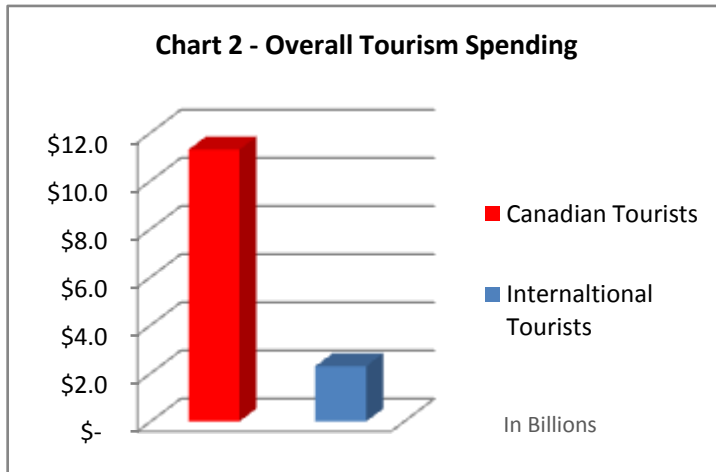
Tourism worldwide is in a state of decline, largely impacted by the global recession. Tourism activity in Canada represents about 2% of Canada's overall Gross Domestic Product (GDP), with a GDP value similar to that of Agriculture, Fishing, Forestry and Hunting combined.

Canadian residents account for 83% of all Canada's tourism spending. Domestic tourism spending totalled 11.3 billion, which was down 3.1% in the first quarter of 2009 compared to the same period in 2008. This was the first decline for a first quarter since 2002, when the tourism sector experienced a drastic downturn following the crisis of September 11, 2001.

Chart 1 - Source of Canadian Tourism Spending

■ Canadian Tourists ■ International Tourists





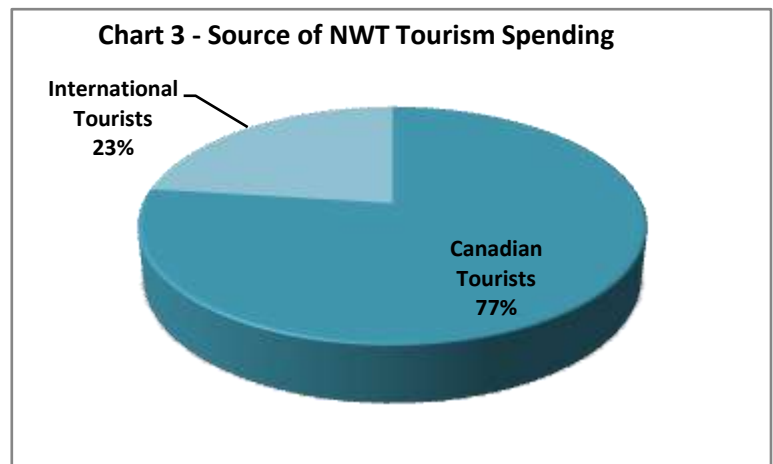
Foreign tourism spending in Canada totalled \$2.3 billion, which was down 9% in the first quarter of 2009 from the previous year. This resulted in the lowest non-resident tourism spending in Canada for a first quarter in over a decade. Despite the depreciation of the Canadian dollar against the Euro, US Dollar and the Japanese Yen, the number of international travellers to Canada decreased by 8.2% compared to the same period of the previous year. American overnight trips to Canada were down 7.6% from the previous year.

4.1.2 NWT AND ABORIGINAL TOURISM

Tourism in the Northwest Territories (NWT) is an important part of the economy and generates more revenue today than all other renewable resource sectors combined.

Tourism currently contributes more than \$130.0 million to the NWT economy. 77% of the visitors to the NWT are from Canada, similar to the national visitor statistics. With higher costs, greater distances to travel, and a limited number of products and facilities, the number of international visitors (including the US) represents 23% of total visitors.

In 2008/09 the total number of visitors declined by 7.7% from the previous year. Overall, visitor spending in the NWT in 2008/09 dropped by 5.5%. Although revenues are down, it is expected there will be an increase over the long term.



Tourism is an important sector in terms of employment opportunities in Canada and the NWT. Tourism employment totalled 577,600 full and part-time jobs in Canada in 2003, and 774 full time job equivalents in the Northwest Territories.

There is limited economic information on Aboriginal and/or cultural tourism in Canada and the NWT. The Aboriginal Tourism Association of British Columbia reports that Canada's domestic Aboriginal tourism market is embryonic in its development. Aboriginal tourism accounted for less than 3% of total B.C. visitor expenditures in 2009, generating approximately \$40M of a total \$13B industry.

4.2 TRENDS IN TOURISM

Specific research was not conducted to measure travel trends to the NWT as part of this project, however, Yukon Tourism commissioned a study in February 2009, entitled, “Demand for Aboriginal Cultural Tourism in Yukon”, and research obtained from the “Aboriginal Tourism Association of B.C.’s Blueprint Strategy”, contain useful information related to this sector.

The Aboriginal Tourism Association of BC (ATBC) indicates that new travel trends are reshaping the development of tourism products. These trends include:

- weekend getaways growing in popularity (with vacations becoming shorter)
- a growing demand for cultural experiences
- authentic interpretation of local attractions and products increasing in importance
- growing interest in experiential tourism, and
- interest in high quality guided interpretation of local cultures and communities being sought.

ATBC reported that:

These changes in travel preferences have created increased market interest in Aboriginal cultural experiences. The cultural experiences could be catered to a larger audience and could be most effectively delivered if the cultural element provides an enhancement to the experience, rather than be the primary focus. It is important for the growth of Aboriginal cultural tourism to recognize that, while some travelers are primarily interested in Aboriginal culture, a much larger market can be captured by enhancing mainstream tourism experiences with an Aboriginal cultural element.

The following were cited as trends and patterns in the Yukon study and can be used as market indicators for the NWT (until such time that specific NWT research can be conducted and verified against Yukon findings):

- general interest in Aboriginal cultural tourism experiences in Yukon is high
- foreign travelers attach greater importance to Aboriginal culture than do North American travelers
- female travelers show greater interest in Aboriginal tourism experiences than do males

- Aboriginal culture is not the primary draw for most tourists, but may be a factor in decisions to visit
- those who have participated in Aboriginal cultural experiences before are likely to do so again
- pre-trip information seeking is minimal, especially among North American travelers
- information seeking during trips relies heavily on local knowledge and word-of-mouth
- different travelers will pay very different prices for Aboriginal cultural experiences
- most travelers interested in Aboriginal culture are primarily looking for a learning-centred experience
- there is interest in both contemporary and historical events and culture
- Aboriginal people are viewed as being closely connected with “nature” and possessing unique knowledge of the natural environment
- older travelers are often more interested in passive learning experiences, while younger travelers desire more active adventures
- independent travelers and those in organized groups seek different travel experiences and different benefits.

4.3 TOURISM INDUSTRY ASSESSMENT

Based on the assessment of the tourism industry it is clear that the global, national and territorial tourism industry has been in decline over the past two to three years as a result of the global economic slowdown. This has resulted in intense, worldwide competition for tourism dollars. As the global and national economy improves, however, it is anticipated that the level of tourism will increase.

NWT Arts and Crafts



It is important to note that the majority of tourism spending in both Canada and the NWT comes from Canadian tourists. Many of the respondents to the survey as well as the consultation session participants focused on international markets for tourism, particularly Europe and Asia. While these are certainly promising, it is essential to also focus on the domestic tourism market. This market includes visitors who are in communities for business purposes. Identifying and targeting these visitors has the potential to significantly add value to the NWT tourism industry.

Aboriginal/cultural tourism is at the beginning stages in the NWT and more research is required to make definitive statements about the market. However, some analysis can be made from the findings of the research conducted to date. For example, the assessment of the tourism industry indicated that the demand for Aboriginal/cultural tourism is growing, however, it is considered as value-added rather than destination tourism. This is consistent with the findings of studies in both the Yukon and British Columbia.

This is a critical point in terms of developing and marketing products that meet the expectations of the tourism market. Products must be designed to augment the experience of tourists who are already planning on visiting, or who are currently in, the NWT. Marketing activities should concentrate on explaining ways in which Aboriginal tourism activities can enhance the overall NWT tourism experience.

It is also important to gain a better understanding of the types of tourists who are most interested in Aboriginal tourism in order to cater visitor experiences to meet their needs. Although there is some base-line information based on studies conducted in the Yukon and British Columbia, more in-depth market research is required in this area.

Finally, product development must be geared to market needs. The Yukon study provides a good base-line of information for product development. Again, more specific information in this area would be useful, however, it will be important to understand and apply this information when developing and assessing Aboriginal tourism products.

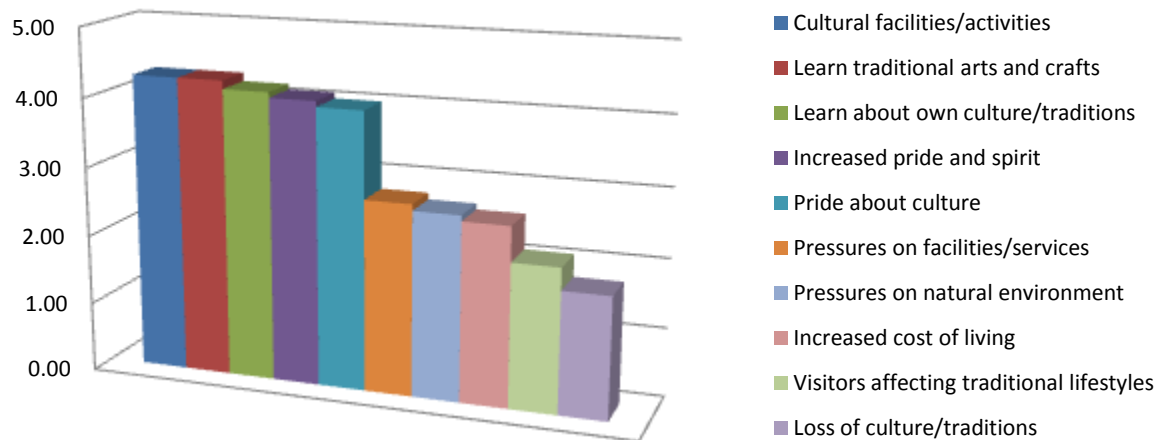
5. BENEFITS AND IMPACTS OF ABORIGINAL TOURISM

Through the research and consultation process, a number of benefits and impacts of Aboriginal tourism were identified. Following is an analysis of these potential benefits and impacts.

5.1 BENEFITS

There was overwhelming consensus among the stakeholders and survey respondents that the benefits of Aboriginal tourism were far greater than the potential negative impacts. Positive factors, which included more cultural facilities and activities, learning about culture and traditions, and increased pride and spirit in Aboriginal heritage, were rated as much more important than negative factors such as pressures on facilities and services and impacts on the natural environment.

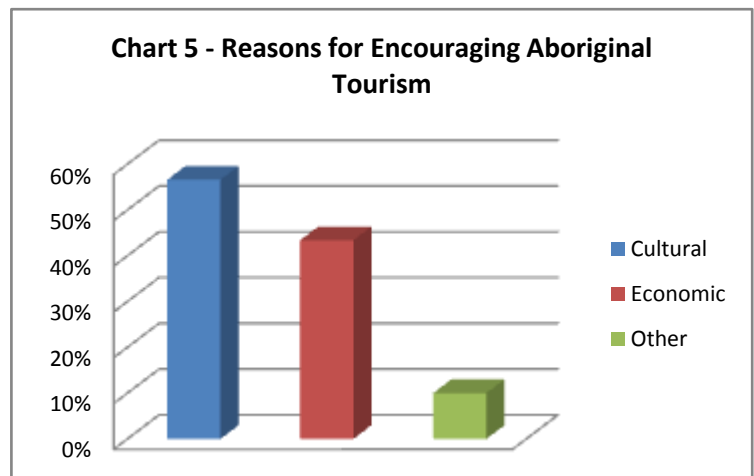
Chart 4 - Importance of Benefits and Impacts of Aboriginal Tourism



The primary benefits cited by both survey respondents and consultation session participants were cultural enhancement and economic development. Interestingly, each group cited cultural benefits as being more important than economic returns.

Approximately 60% of survey respondents cited cultural benefits as one of the most important reasons for encouraging tourism development in their region. Cultural benefits included:

- sharing cultures with visitors
- reinvigorating pride of culture
- preserving cultural heritage
- learning and practicing traditional activities such as arts and crafts, and
- Aboriginal peoples learning more about, and sharing, their own culture and traditions.



Survey respondents cited economic benefits as the second most important reason for encouraging Aboriginal tourism. Economic benefits were seen as:

- increasing revenues within the region and communities
- establishing economic development and business opportunities
- increasing sustainable employment opportunities, and
- reducing dependence on governments and other funding agencies.

Other benefits of Aboriginal tourism included capacity building, interaction with other cultures and product development.

Consultation session participants had similar responses to questions concerning the benefits of Aboriginal tourism. Participants stated that the majority of community residents support increased tourism. The benefits most often cited by participants were either cultural or economic. Cultural benefits included:

- protecting Aboriginal culture
- bringing pride to Aboriginal people

- Aboriginal peoples, and particularly youth, learning more about their own culture and traditions
- learning or promoting traditional activities and arts and crafts
- teaching about culture and language to visitors
- more people seeing and sharing in the culture
- maintaining traditional lifestyles through tourism, and
- showcasing Aboriginal culture to the world.

Economic benefits cited by consultation session participants included:

- community employment
- diversifying the economy
- establishing sustainable jobs, and
- the opportunity to develop tourist businesses.

Other benefits included capacity building and training and development opportunities; involving Elders in developing tourism products and services; and bridging relationships between Elders and youth.

5.2 IMPACTS

While both the survey respondents and consultation session participants stated that the benefits of Aboriginal tourism were more important than the impacts, a number of concerns and challenges were raised.

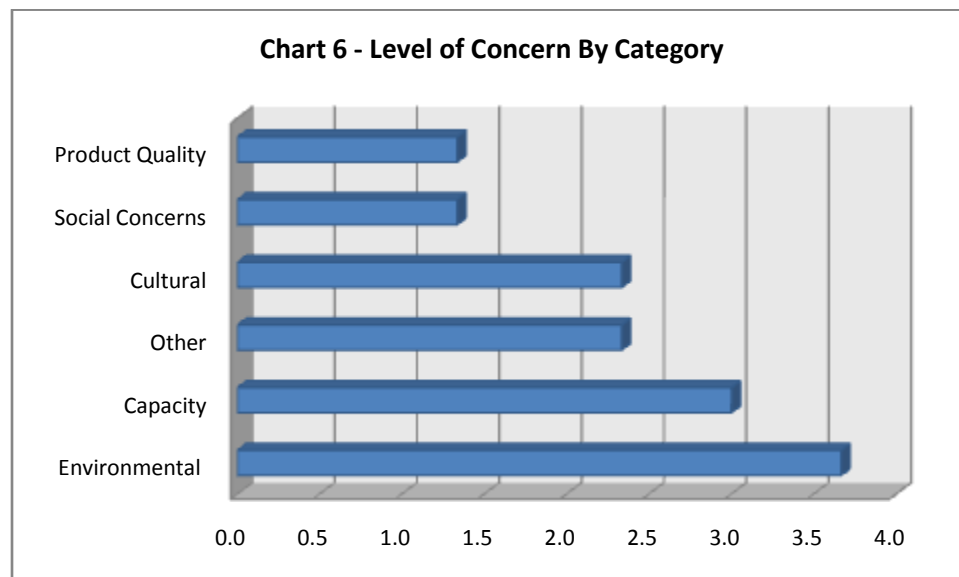
Survey respondents were most concerned over environmental issues and the capacity of Aboriginal persons and businesses. Environmental concerns included the potential for:

- added stresses on the environment as a result of tourism
- increased levels of pollution, and
- over-harvesting of fish and game stocks.

Capacity issues included the lack of capacity to deliver tourism programs and services; lack of business and management skills; and the need for training and development programs.

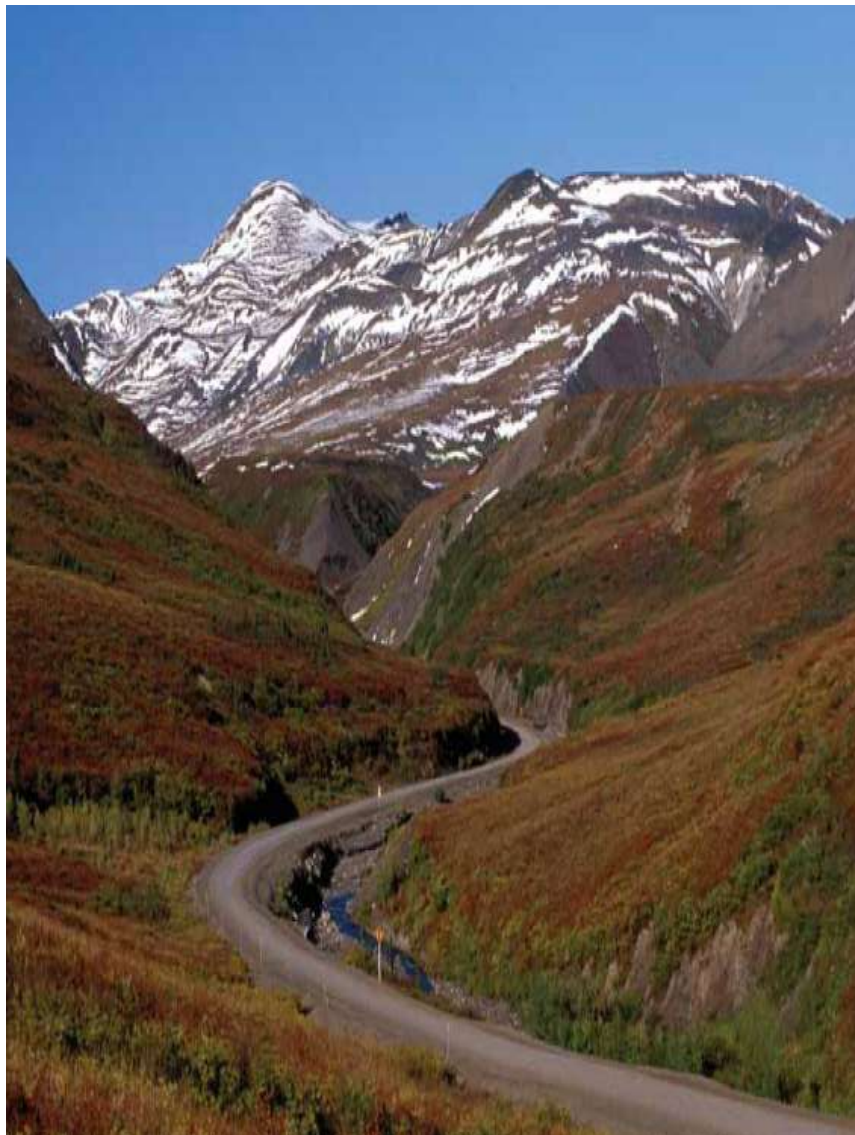
Respondents also cited concerns over other potential impacts including:

- cultural values being eroded
- the potential of increased social issues such as drugs and alcohol
- potential increases in the cost of living, and
- the lack of quality of Aboriginal tourism products to meet tourism needs.



These issues were echoed by consultation session participants who were generally most concerned about impacts to the environment as a result of increased tourism and the need to protect environmentally and culturally sensitive areas. Other concerns raised by consultation session participants included the possibility of increased social issues such as drugs and alcohol and the lack of capacity to deliver quality Aboriginal tourism related products and services.

The Dempster Highway



5.3 BENEFITS AND IMPACTS ASSESSMENT

There are a number of potential benefits and impacts that may result from increased Aboriginal tourism in the NWT. Developing the Aboriginal tourism industry will require a considerable investment and the equivalent economic returns may not be realized for a period of time. Therefore, it is essential to look at the value of Aboriginal tourism from a larger context than a strictly business perspective.

From a Community Economic Development perspective, tourism presents an opportunity to develop local businesses and provide employment opportunities that do not currently exist. It is also an opportunity to showcase a community to outside visitors and provides an incentive to enhance the physical characteristics of a community, build up traditional and cultural artefacts and sites, and develop facilities that improve the conditions for local residents as well as visitors. It is also an opportunity to develop transferable and sustainable business and employment skills within the community.

More importantly, respondents saw Aboriginal tourism as an opportunity to reinvigorate Aboriginal cultures and traditions and to pass these on to the youth of the community. Being involved in the Aboriginal tourism industry will provide the opportunity for people to become better acquainted with their own cultures and traditions, and gain pride in sharing these with others who have a dedicated interest in the area. This may be the greatest value in developing Aboriginal tourism.

While the benefits can be substantial, the potential impacts must be taken into consideration in the development and marketing of Aboriginal tourism products. Of greatest concern is the protection of the environment and the protection of culturally important areas and artefacts. Those involved in the industry must respect the environment and culture and ensure that the potential negative impacts are mitigated in an effective and meaningful way.

A primary method for ensuring the protection of the environment and culturally and historically important areas is to involve community representatives, and particularly Elders in the development and approval of Aboriginal tourism products.

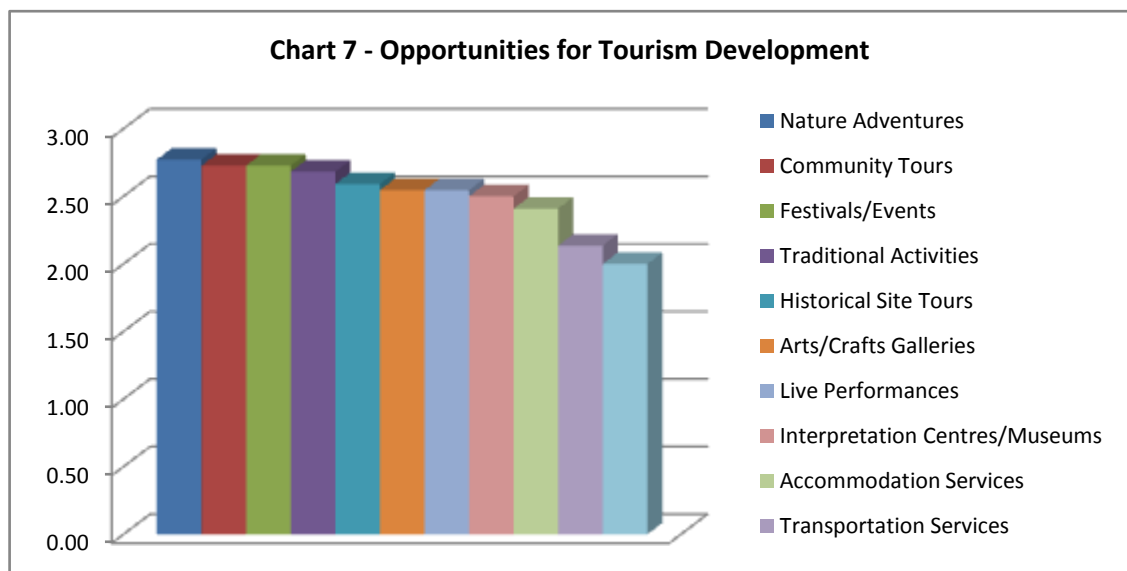
6. OPPORTUNITIES

As previously stated, the tourism industry is in the very beginning stages of development. As a result, it is an excellent time to consider what the opportunities are and where to target industry development, capacity building, product development and marketing initiatives in the future.

As part of an overall Aboriginal Tourism Strategy, it is important to look at these in more detail, however, there are indicators of the best opportunities that could be pursued.

Both the survey respondents and the consultation session participants suggested a wide range of areas that could be explored. As demonstrated in the following chart, these included such areas as:

- outdoor activities and nature adventures
- community and historic tours
- traditional activities, festivals, events and performances
- interpretation centres and arts and crafts galleries, and
- accommodation and transportation services.



The primary issue is that, with a few exceptions, these represent concepts for tourism development, rather than actual tourism products that can be effectively marketed and delivered. There are many steps that need to take place before these concepts can become actual products with the requisite infrastructure, supports, capacity and packaging to meet tourist expectations.

However, there are opportunities for Aboriginal tourism that could be developed with the proper approach. ATBC has identified six potential market areas that were of interest to visitors to the BC cultural tourism market:

Aboriginal Heritage Market – Aboriginal museums, art galleries or authentic Aboriginal facilities and sites.

Aboriginal Events and Festivals Market – Aboriginal performing arts, events and ceremonies.

Aboriginal Cuisine Market – traditional or contemporary Aboriginal cuisine.

Aboriginal Nature-Based Market – outdoor adventure, including hunting and fishing, or visiting pristine wilderness areas with Aboriginal guides.

Aboriginal Arts and Handicraft Culture Market – view/purchase authentic Aboriginal arts, crafts and handiwork.

Aboriginal Sport Culture Market – view or take part in Aboriginal sporting events.

These categories closely mirror the areas identified by the stakeholders consulted as part of this analysis. However, it must be mentioned again that these are currently ideas for potential tourism. There is a significant amount of work that needs to be done to turn these ideas into actual tourism products.

7. CHALLENGES

There was an overwhelming consensus on the part of stakeholders that there are considerable opportunities to develop Aboriginal tourism in the Northwest Territories. There was also a clear recognition that the Aboriginal tourism industry is at the very early stages and that substantial work, resources and support is required to make it a viable part of the tourism sector.

The primary challenges can be set out in five broad categories that should be used as the basis for the development of a multi-year, multi-phase Aboriginal Tourism Strategy. These primary challenges are the need for:

1. Lead Agency/Organization
2. Aboriginal Tourism Strategy
3. Industry Development
4. Capacity Building
5. Product Development
6. Marketing and Promotion.

The following sections include an assessment of each of these challenges and recommendations on how to address each specific challenge.

For the most part, the challenges must be addressed in a strategic and phased approach. For example, the first step must be to identify a lead agency or organization to oversee the development and implementation of a strategy. Without a champion for Aboriginal tourism it is unlikely that the industry will fully develop to become a viable sector of the NWT tourism industry.

Once a lead organization or agency is identified, they must be tasked with developing a multi-year, multi-phased Aboriginal Tourism Strategy to develop the industry over the next five to ten years. Likewise, building the industry base needs to be done in order for capacity building to be effective; tour operators and tourism employees require a certain level of capacity in order to develop and deliver quality products; and quality products are required in order to effectively market and promote Aboriginal tourism in the NWT.

There must be some flexibility within the approach to provide assistance to communities and operators who are at the marketing and promotion stage, however, it is recommended that the proposed process be followed to allow for the development of quality products that will meet and appeal to market needs.

8. LEAD AGENCY OR ORGANIZATION

Based on the findings of consultations with stakeholders, it is clear that there is currently no one identifiable group who is responsible for developing the Aboriginal tourism industry.

Therefore, the first step in developing the Aboriginal tourism sector in the NWT is to identify a group or organization to act as the industry champion. One of the most common concerns expressed by the stakeholders was the fact that there was no identified individual or organization that could lead the development of an Aboriginal tourism industry.

There are currently three primary organizations that provide support to the tourism industry in the NWT; the Department of Industry, Tourism and Investment (ITI), the Northwest Territories Tourism Association (NWTT) and the Federal Department of Indian Affairs and Northern Development. The consensus of the stakeholders was that none of these organizations were providing sufficient support to the development of Aboriginal tourism.

It is important to note, however, that none of these organizations have been specifically tasked with the development of Aboriginal tourism. For example, ITI is responsible for overall tourism development and support. NWTT is largely responsible for marketing the entire NWT tourism industry – specifically promoting market-ready tourism products, in addition to representing tourism industry operators.

Based on the responses of stakeholders, the NWTT must do a better job understanding and promoting regional tourism products and services. On the other hand, regional and Aboriginal representatives must do a better job of representing their regions at the Board level. Most importantly, market-ready Aboriginal tourism products must be developed in order for the NWTT to effectively promote Aboriginal tourism as a sector.

It is therefore essential to identify a group or organization that is given specific responsibility for the development of the Aboriginal tourism industry. While an organization is needed to address the significant development challenges facing the Aboriginal tourism industry (including awareness among NWT stakeholders), it is perhaps most needed to simply move the industry forward.

Similar organizations have been established in a number of other jurisdictions such as British Columbia and Alberta. These organizations are helping to establish a vibrant Aboriginal tourism industry in these provinces. Establishing a similar organization in the NWT is a crucial first step in the process.

Recommendation 1: Identify a Central Organization or Lead Organization or Agency

It is highly recommended that a champion organization be identified to develop and oversee the Aboriginal tourism strategy. Without such an organization, it is doubtful that Aboriginal tourism can become a viable sector of the NWT tourism industry.

The responsibilities of the organization should include:

- lobbying for recognition, support and resources for Aboriginal tourism
- ensuring that regional interests are represented
- developing and overseeing implementation of a multi-year, multi-phased Aboriginal Tourism Strategy as described in this report
- making key decisions such as the definition of Aboriginal tourism
- overseeing the development of Aboriginal tourism products, and
- interfacing with the NWTT to promote Aboriginal tourism.

Ultimately the organization could take on responsibility for such activities as product development and acting as a coordinator/booking agent for Aboriginal tourism operators.

The Project Team has identified four options for establishing such an organization.

Option 1 – Mandate NWTT to Take Responsibility for Aboriginal Tourism

The first option is to give NWTT the mandate to develop and implement the Aboriginal Tourism Strategy. The benefit of this approach is that the NWTT is already in place. As a result, there are limited additional administrative resources required.

The disadvantage is that the focus of the NWTT to date has been on the promotion of market ready tourism products. There is significant work that needs to be done to bring the Aboriginal tourism to the point of being market ready. A separate organization with this focus may therefore be warranted.

Option 2 – Establish a Territorial Aboriginal Tourism Council

The second option would be to establish a Territorial Aboriginal Tourism Council. The Council would be tasked specifically with overseeing the development and implementation of the Aboriginal Tourism Strategy. Each region would have representation on the Council. Administrative support for the Council could be provided by either ITI or the NWTT.

Option 3 – Establish Regional Tourism Councils

There was a strong recommendation from at least two regions that Regional Tourism Councils be established. The regions felt that they were not being effectively represented by the NWTT and that only a regional organization would fully understand the products that they had to offer.

The benefit of this option is that the regions have the best understanding of the attractions, products and services within the region and are best able to represent those products and services. The disadvantage is that Regional Councils will divide limited resources and fragment a fledgling industry in a highly competitive global market. Regional Tourism Councils may be more appropriate once more market ready products and services have been developed.

Option 4 – Create an Aboriginal Tourism Section Within ITI

A fourth option is to create a section within the Department of ITI to focus specifically on the development of an Aboriginal tourism sector/industry. Additional resources would need to be allocated to the Department's HQ and regional development functions, since the Project Team found that the majority of regional offices were consumed with issues affecting the NWT tourism industry in general, with little time available to develop new mainstream products let alone a new sector/industry.

The advantage to creating a specific discipline within ITI is that it supports the current tourism development mandate of the GNWT. The disadvantage is that the development of this sector should be driven by Aboriginal people that have a vested interest in its success.

9. STRATEGY DEVELOPMENT

Aboriginal tourism is not currently recognized as a sector of the NWT Tourism industry. As a result, Aboriginal tourism operates on a largely ad hoc basis. There are a few successful operators that could be considered under the banner of Aboriginal tourism.

For the most part, Aboriginal tourism businesses operate on an as and when required basis. There is little structure to the industry and no clear vision of where the industry should be headed in the future.

A multi-year strategic plan is required that establishes a clear vision, principles, goals and objectives and a framework for moving forward. The strategy should be developed by Aboriginal groups and tourism operators to provide direction on providing resources and support for developing the industry.

Market research must be undertaken as a first step in developing a sector strategy. Research will provide a better understanding of the demand for Aboriginal cultural tourism products - information crucial to the development of market ready products. In addition, research will help direct investment by determining the level of importance and priorities to ensure an optimum return. Many of the provincial departments took the lead in providing market research to industry associations responsible for the development of Aboriginal tourism. The strategy should address the challenges outlined in this report and include the recommendations as determined appropriate by the strategy development group.

Aurora Viewing



Recommendation 2: Develop a multi-year Aboriginal Tourism Strategy.

It is recommended that a multi-year Aboriginal Tourism Strategy be developed by a group of stakeholders that includes Aboriginal organizations, tourism operators, and others with a vested interest in developing the Aboriginal tourism industry. The strategy should address each of the challenges identified in this assessment and include:

- Vision, principles and values
- Market research and assessment
- Challenges and opportunities
- Roles and responsibilities
- Short, medium and long-term objectives
- Monitoring, evaluation and reporting processes.

A key component of the strategy must be annual workplans that identify required resources and supports, areas of responsibility, timelines and milestones for success. Critical to the success of the strategy is that it is developed by Aboriginal people – communities, elders, organizations/businesses/individuals that will be involved in its delivery.

9.1 DEFINITION OF ABORIGINAL TOURISM

A critical component of the Aboriginal Tourism Strategy must be a clear definition of Aboriginal tourism in the NWT. A definition will help identify who is eligible for support and assistance in terms of capacity building, product development and/or marketing and promotion of Aboriginal tourism products and services.

Defining Aboriginal tourism will assist in identifying the types of products and services to be developed and help to establish clear and consistent marketing and promotion strategies. A clear definition will also help to define what visitors can expect through an Aboriginal tourism experience in the NWT.

There are a number of existing definitions for Aboriginal and/or cultural tourism. In the Aboriginal Cultural Tourism Blueprint Strategy for BC, Aboriginal Cultural Tourism is defined as:

...a cultural experience that must be tied directly to an Aboriginal person, or group of Aboriginal people. The Cultural experience is authenticated in one of two ways:

1) *As a direct result of permission provided through that person or person's Cultural Keepers, Elders or those designated with the authority to approve the sharing of the experience as it relates to that culture; or*

2) *As a result of experiences relating to either traditional Aboriginal culture or today's living culture as it is reflected through modern day lifestyle.*

Based on discussions with stakeholders, there are three key elements that must be considered in establishing a definition of Aboriginal Tourism in the NWT:

- a) authenticity
- b) participation, and
- c) ownership.

Authenticity

Authenticity was the primary consideration for stakeholders in determining what should be included under Aboriginal tourism. Authenticity in this case means that goods, services or activities have some cultural and/or historical reference to traditional northern Aboriginal experiences and lifestyles. It also means that the development and/or manufacture of goods, services or activities must have some direct ties to northern Aboriginal peoples.

Authenticity was presented as a much debated topic in the report, "Demand for Aboriginal Cultural Tourism in Yukon." The report indicates that the few points of consensus appear to be:

- there is a great deal of variation on the levels of importance attached to authenticity by tourists
- there is considerable variation in what it means to different tourists, and how its presence or absence is judged, and
- the perceived need for communities and businesses to provide what tourists consider to be "authentic" experiences often presents challenges due to potential disconnects between the reality of operating a tourism business and the expectation of tourists, which sometimes are based upon false and/or outdated images of Aboriginal people.

These factors must be taken into consideration when determining the meaning authenticity.

Participation

The second key element that was expressed throughout the consultations was the importance of participation by northern Aboriginal peoples in the development and delivery of Aboriginal tourism products and services. Participation in this case was wide ranging and included Aboriginal peoples being:

- owners of the business
- employees in the delivery of products and services
- interpreters of traditional, cultural or historic products, services and activities
- performers of traditional activities including cultural and sporting activities
- on-the-land guides, and/or
- community and historic tour guides.

Participants stated that not everyone involved in the business or organization had to be an Aboriginal person, but that Aboriginal participation in some form was critical.

Stakeholders also commented that the operators and staff had to have a very good understanding of Aboriginal customs, traditions, culture and history. It was stated on several occasions that many younger Aboriginal people are not familiar with these traditions, and would therefore have to be coached and mentored in order to deliver products and services. A key benefit in developing the Aboriginal tourism industry would be to teach young Aboriginal persons about their heritage and reignite a pride in Aboriginal culture and traditions.

It was recommended on several occasions that participation include community representatives, and particularly Elders, reviewing the goods and services to ensure that they were authentic and represented the traditions and cultures of the peoples of the region.

Ownership

The third element was the issue of ownership and equity share. In some jurisdictions, ownership is the overriding factor in determining whether a business or organization qualifies as an “Aboriginal tourism operation”. However, ownership was not seen by most stakeholders as the key issue. In fact, some stakeholders did not see ownership as an issue at all, as long as the business or organization was authentic and included some form of Aboriginal participation.

There are three levels of ownership that need to be considered.

Level 1 – No Required Aboriginal Ownership

The first level is no requirement for Aboriginal ownership. The benefit is that this allows for greater opportunities to develop Aboriginal tourism products and services as investment can come from a wide range of sources. The detriment is that it does not provide an opportunity for growth in Aboriginal business development and ownership.

Level 2 – Partial Aboriginal Ownership

The second level would be a set percentage of Aboriginal ownership (i.e. 50%). This would ensure that Aboriginal businesses and peoples would have direct buy-in in the development and delivery of products and services. It would also encourage establishing joint-venture partnerships that allow Aboriginal businesses to develop business skills and acumen and to directly benefit from potential profits. The detriment to this model is that there may be only a limited number of Aboriginal persons/businesses with the business skills and resources to enter into a joint venture operation.

Level 3 – Full Aboriginal Ownership

The third level would be full ownership by a northern Aboriginal business, individual or organization. This would ensure that all profits would accrue directly to an Aboriginal owned entity. The detriment would be that it would significantly limit the number of business and operators that would be able to access resources associated with the Aboriginal tourism designation. It would also limit the ability for Aboriginal operators to learn from, and share ideas with, more experienced non-Aboriginal operators.

Recommendation 3: Establish a clear definition of Aboriginal Tourism

As part of the Aboriginal Tourism Strategy, it is essential to establish a clear definition of Aboriginal tourism. The definition will establish the types of business and organizations that qualify for resources and support under the Aboriginal tourism strategy; provide a framework for developing and marketing products and services; and provide visitors with an understanding of what they can expect from an Aboriginal tourism experience in the NWT.

In developing the definition, the following factors and questions must be considered:

1. Authenticity
What is an authentic experience?
Who determines authenticity (i.e. Board, Elders, operators)?
2. Participation
Is Aboriginal participation required?
If yes, what types of Aboriginal participation is required (i.e. as employees, guides, interpreters, authenticators, etc.)?
What level of participation is required (i.e. full participation, shared participation, etc.)?
3. Ownership
Is Aboriginal ownership required?
If yes, what level of Aboriginal partnership is required (i.e. 25%, 50%, etc.)?

10. ABORIGINAL TOURISM INDUSTRY DEVELOPMENT

Participants in each of the focus group sessions agreed that, despite a long history of tourism in the NWT, Aboriginal tourism is in its infancy. With the exception of a few successful operators, Aboriginal tourism is at square one in terms of development.

As a result, there is a limited understanding of the tourism industry by many of the communities, businesses and individuals who are interested in pursuing tourism opportunities. There are also serious inconsistencies in the level of tourism products and services, the availability of tourism operators, and an inability to sustain Aboriginal tourism businesses over the long term.

As a next step in the process therefore, it is essential to establish the foundations of the Aboriginal tourism industry in order to move forward with capacity building. Industry development includes:

- industry and community preparation
- developing industry standards and certification, and
- establishing partnerships and supports.

10.1 INDUSTRY AND COMMUNITY PREPARATION

It became clear in discussions with stakeholders that there is a wide range of understanding of the tourism industry in general, and Aboriginal tourism specifically, among communities, operators and others involved in the sector.

Successful tourism operators fully understood that the industry is market driven. They had an understanding that the tourism market is highly competitive on a global basis and it is critical to find and cater to specific markets that have the interest and resources required to travel to high value locations such as the Northwest Territories.

Successful operators also understood that a tourism business requires a high level of dedication and commitment and that it takes years for a business to become self-sustaining. NWT tourism operators spoke of the characteristics needed to succeed in a seasonal industry including passion, drive to succeed, hard-work, selflessness, long

hours, service to others, etc. They were well aware of the vagrancies in the market caused by such factors as the global economy and/or the ability to provide services to the market. Most importantly, successful operators understood that the tourism industry first and foremost is a business that is driven by market demand and, for the most part, destination based.

Market driven means that operators must have a clear understanding of who their target market is, what their expectations are, and how best to meet those expectations in a professional manner. The tourism industry must therefore adapt to meet the needs of the market. Many start-up businesses and/or communities appear to feel that the market should adapt to the current status of the tourism industry. This state of mind must change in order for Aboriginal tourism to be successful.

Destination based tourism means that most tourists travel to a region because of the physical, climatic or geological aspects of the area, or to participate in specific activities. Studies in other jurisdictions have demonstrated that cultural tourism is generally value added. Tourists and visitors who are already in the region will take advantage of Aboriginal/cultural activities if available. Few tourists will travel to a specific location simply to engage in Aboriginal/cultural tourism activities.

It should also be noted that Aboriginal/cultural tourism is at the developmental level in most jurisdictions. For example, it is estimated that Aboriginal tourism in B.C. represents less than three percent of all tourism expenditures, and is largely successful due to the fact that BC tourism delivers an enormous captive audience spending in excess of 13 billion dollars.

Understanding these basic tenants of the tourism industry is critical to the development and promotion of Aboriginal tourism products. Much work has been done to understand who is travelling to the NWT and the reasons for the travel. However, little of this analysis has gone into understanding the ways in which Aboriginal tourism operators can tap into existing and potential markets.

In order for tourism to be successful at the community level, communities as a whole must also be prepared to welcome visitors. Visitors must feel safe and welcome in the community in order to have a positive experience and to promote the community to other potential tourists. Communities must be aesthetically appealing and make every effort to ensure that public and private properties are well maintained and well cared for. Communities as a whole must make a concerted effort to be “tourist friendly” and

establish the foundation for visitors to feel welcome and invited and have a positive community experience.

The Aboriginal Tourism Strategy must therefore include a component on increasing basic awareness and understanding of the tourism industry. Communities, operators and people interested in tourism require a much better understanding of both the positive and negative aspects of the industry. Providing opportunities for awareness and understanding will also help to identify those who are truly interested in the tourism sector and provide further capacity development opportunities.

Recommendation 4: Conduct an Analysis of the NWT Aboriginal Tourism Market

As part of this analysis, the Project Team undertook an analysis of the NWT Aboriginal tourism market, however, a more in-depth understanding of the market is required. It is therefore recommended that a specific study of the market and the expectations of tourists and visitors be completed.

A number of similar studies have recently been completed in other jurisdictions including in the Yukon and B.C. It is assumed that there are similarities in the expectations of tourists in terms of Aboriginal/cultural tourism. A meta-analysis of recently completed studies may therefore suffice. However, a detailed analysis specific to the NWT market may be warranted. This would include conducting market surveys with tourists travelling to the NWT as well as with booking agents from targeted markets.

Recommendation 5: Develop and Deliver Aboriginal Tourism Orientation Workshops

It is essential that individuals, businesses and communities understand all aspects of the tourism industry including meeting market demands; product development; marketing; and operations. It is just as important to ensure that communities as a whole understand and value tourism and that efforts are made to make communities tourism friendly. Aboriginal tourism orientation workshops are therefore required to ensure that those interested in the industry have a full understanding of what is involved in developing a viable product and business.

There is currently a limited understanding of what is involved in establishing and operating a successful tourism business. In order to expand the Aboriginal tourism sector, individuals, businesses and communities need to understand the level of commitment and investment required to establish a local tourism sector, and the need to meet the expectations of the market in an authentic and professional manner.

Orientation sessions should therefore be developed for interested communities, businesses and individuals. Specific orientation workshops should be designed for:

- current and potential tourism operators and employees
- communities, and
- Community and Aboriginal Councils and Leadership.

The purpose of the workshops should not be to provide detailed training in specific areas of product delivery, but to provide a general introduction to the tourism industry and the process to develop market ready tourism products as well as how to ensure the community can provide positive tourism experiences.

10.2 INDUSTRY STANDARDS AND CERTIFICATION

Stakeholders regularly commented that there is a wide range of tourism service providers in the NWT. Many of the service providers are mature businesses with high standards for the delivery of products and services. However, many tourism operators provide inconsistent, and often unreliable, products and services. It is critical that tourists and booking agents can rely on operators to be available when required, and to provide a standard level of products and services that meet market needs and expectations.

Developing Aboriginal and/or overall tourism industry standards will ensure that there are clear expectations of operators and staff in such critical areas as authenticity, reliability, product/service delivery, business management, human resources, and safety. Standards will help to identify deficiencies in individual operations and areas where further capacity building is required.

As part of the standards development, a certification process should also be established. Businesses and organizations who meet the standards should be recognized as approved Aboriginal tourism operators. Businesses/organizations who receive certification must be expected to maintain the standards of service.

Standards can be used as a key marketing tool. Tourists and visitors are much more inclined to book travel activities with operators who can demonstrate that they have met an industry standard for the provision of products and services.

Standards can also be used as the basis for capacity building including the development and delivery of assessment strategies and training programs targeted at specified requirements.

Along with the development of standards, there will be a requirement for some level of inspection to ensure that businesses are meeting the standards on an on-going basis. For those businesses that do not meet industry standards, there is a need to identify deficiencies and the steps an operator would have to take to become certified.

Recommendation 6: Develop Industry Standards and Certification

It is essential to develop standards for the Aboriginal tourism industry. Standards can be used to set an expected level of service; ensure availability and commitment of operators; establish business and human resource requirements; and ensure that Aboriginal tourism businesses are operating in an authentic, safe and effective manner. Standards can also be used for capacity building and as a marketing tool.

Standards are already in place in a number of jurisdictions. These standards can be adapted to the NWT situation.

Industry certification should be included as part of the standards development process. Business and organizations who meet the standards should be recognized as Aboriginal tourism operators. Certification will allow businesses/organizations to promote their products and services to the national and international Aboriginal/cultural markets.

The standards and certification process must also include an inspection and evaluation process to ensure that certified operators are meeting requirements on an on-going basis and to provide mentorship and resources to operators who have not attained the required level of service.

10.3 PARTNERSHIPS AND SUPPORT

Another key area of discussion among stakeholders was in the level of partnerships and support for Aboriginal and regional tourism. The organizations most often cited as supporting tourism in the NWT were the Department of Industry, Tourism and Investment, Northwest Territories Tourism, and Aboriginal Tourism Canada. The role of the Federal Government was seen as primarily a funding agency.

As previously mentioned, most stakeholders did not feel they were receiving sufficient support from these agencies. However, the organizations have not been specifically tasked with developing Aboriginal tourism in the NWT nor has there been a strategic approach to industry development.

Recommendation 7: Define Partnerships and Supports

For the strategy to be effective, both ITI and the NWTT should be partners in the development and marketing of Aboriginal tourism. The specific roles and responsibilities of each organization will have to be established, however, it is recommended that ITI work closely with the Lead organization to develop the industry and specific products and services. It is also recommended that the NWTT work with the Lead organization to promote Aboriginal tourism products once they are market-ready. As sufficient products are developed, Aboriginal tourism should be recognized as a sector under the umbrella of NWT tourism by the NWTT.

10.4 ABORIGINAL TOURISM BUSINESS SUBSIDIES

It will take some time before new or underdeveloped Aboriginal tourism businesses are able to develop market-ready products, and even more time to become profitable and self-sustaining. Aboriginal tourism operators will need time and resources to fully understand the industry; develop their own capacity and the capacity of employees; develop a product or products to the market ready stage; and market and deliver the products.

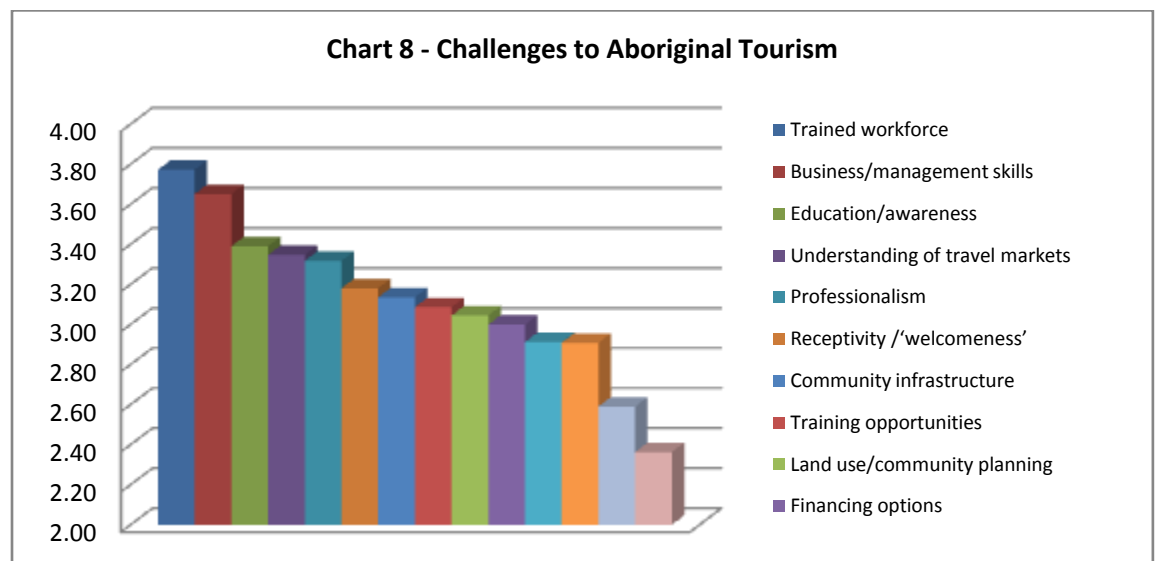
Newly formed or underdeveloped businesses will not likely survive the start-up phase before being able to create sufficient revenues to become self-sustaining. The GNWT, possibly in partnership with the Government of Canada, should therefore consider creating a subsidy program to allow Aboriginal tourism businesses with the resources required to become viable operations.

Recommendation 8: Establish an Aboriginal Tourism Subsidy Program

It is recommended that the GNWT consider establishing a subsidy program to allow Aboriginal tourism entrepreneurs with the resources required to develop a viable tourism business. Strict guidelines will have to be placed on the subsidy program to ensure that funding flows to those with a serious interest in tourism and the potential and commitment to develop a viable product.

11. HUMAN RESOURCES AND CAPACITY BUILDING

A critical component of the Aboriginal Tourism Strategy must be human resources and business capacity building. As demonstrated in Chart 8, survey respondents rated the lack of a trained workforce, lack of business/management skills and the need for education and awareness about the tourism industry as the most significant challenges facing the development of Aboriginal tourism in the NWT.



This is consistent with the findings of the consultation sessions. Participants in these sessions regularly commented that two of the biggest challenges for industry development were:

- the lack of a trained, qualified and committed workforce to deliver tourism products and services, and
- the lack of Aboriginal tourism business operators with the tourism and business skills and/or commitment and dedication to be successful.

11.1 HUMAN RESOURCES CAPACITY BUILDING

Consultation group participants in all regions stated that the lack of a trained and qualified tourism workforce was a major deterrent to developing the industry. Providing tourism services requires a wide range of skills and abilities. Tourism operators and service providers not only require technical skills, but must be able to effectively interact with visitors in a social situation. The Project Team was regularly informed that while many Aboriginal people had the technical skills, they required training and development in such areas as hosting and social interactions with visitors from other cultures.

A second key factor severely limiting the development of the Aboriginal tourism industry was the lack of commitment and dedication by both tourism businesses and employees. The Project Team was informed that many Aboriginal tourism businesses operate on an inconsistent and “as available” basis. It was therefore very difficult to schedule tourism activities in some communities as the booking agent could not be certain that the operator would be available.

The Project Team was informed that on some occasions tourists were taken to a community only to find that the business operator was not available. The tourists were therefore either left to their own devices, sometimes for several days at a time, or alternative activities had to be quickly arranged that did not meet the tourists expectations or that resulted in additional and unexpected costs for the tourists or the booking agent.

Tourism employees were also often not available as scheduled which would have similar results. For example, food services staff may not arrive as scheduled leaving tourists to fend for themselves to arrange meals.

Other human resources and capacity building factors limiting Aboriginal tourism development included:

- a lack of understanding of the tourism industry and what it takes to be successful
- the fact that the tourism season occurs when many Aboriginal people are engaged in traditional, on-the-land activities such as hunting and fishing
- competition for a limited workforce with other, higher paying industries such as mining and oil and gas

- reluctance by some Aboriginal persons to engage in social interactions with tourists, and
- the fact that tourism related jobs often do not pay as well as other jobs.

While there are challenges to business and human resource capacity development, there are several reasons for Aboriginal persons to enter into the tourism industry either as business operators or employees. Unlike many resource based jobs, tourism occupations are community based allowing operators and employees to remain in their home communities. Tourism jobs are often related to traditional activities such as outdoor and on-the-land activities; arts and crafts; or traditional lifestyles. Tourism jobs allow Aboriginal persons to learn, practice, share and gain pride in their culture and history.

Cultural Events

Many tourism jobs and business can also be combined with other forms of employment. For example, employees working in industrial jobs are often on a two week in/two week out schedule. During the off periods, there are opportunities to engage in tourism businesses.

In order to meet the above challenges, specific human resource and capacity building strategies are required. The following recommendations are designed to address these challenges.



Recommendation 9: Develop Occupational Standards

There is a need to develop occupational standards for key positions in the tourism industry. Occupational standards have become the basis for establishing expected levels of training and professionalism for a range of industries including the tourism industry.

Occupational standards will help identify the key areas for developing training that meets the specific needs of the industry. Training programs and curriculum can then be developed based on the occupational standards. Individuals who have completed the training can be recognized for their level of competence and professionalism.

Occupational standards have been developed for tourism based occupations in other jurisdictions and it may be possible to adapt these for use in the NWT. Occupations that should be considered for standards development include:

- hosts
- servers
- cooks
- hunting, fishing and outdoor guides, and
- accommodations staff.

Recommendation 10: Establish a Hosting Skills Program

The Project Team was informed that many people involved in the Aboriginal tourism industry, either as business owners or as employees, did not have the required level of hosting skills. These skills include ensuring that facilities are clean and well cared for; interacting with visitors and tourists; and ensuring that tourists have a positive experience.

An Aboriginal Tourism Hosting Program is needed to set the standard for hosting tourists and to provide much needed training in this area for business owners and staff. Businesses and employees who complete the program can promote themselves as meeting the expected level of service.

Recommendation 11: Aboriginal/General Tourism Skills Program

Many interested in the tourism sector may not have the requisite Aboriginal Tourism Skills. There is a need to enhance the technical skills of many operators and employees including in such areas as hunting and fishing guides; arts and crafts; traditional lifestyles and so on. This is particularly true for young people who may not be fully familiar with traditional skills.

There is also a critical need to develop occupational health and safety training programs for the Aboriginal tourism industry. Many Aboriginal tourism activities include outdoor activities and transportation of tourists through a variety of means. Basic safety training is essential to ensure the safety of tourists, operators and employees and to safeguard businesses and organizations from serious liability issues.

Ultimately, the goal should be to develop an Aboriginal Tourism Program that provides certification for those who complete the program. Partnering with an educational institution such as Aurora College to develop and deliver such a program is highly recommended.

11.2 BUSINESS CAPACITY BUILDING

The Project Team was informed that there are serious business capacity building issues that need to be addressed. The primary issues revolve around building business skills for tourism operators and providing on-site supports once businesses are in operation.

One of the biggest issues raised at each of the consultation sessions was the costs of insurance for tourism operators. Insurance premiums are very expensive, particularly for operators who do not have a steady clientele base and regular operations. There may be little that can be done concerning this issue, however, it has to be noted because of the emphasis placed on this by stakeholders.

Recommendation 12: Develop a Business Skills Program

There is a critical need for the development of business skills for Aboriginal tourism operators. Many operators have the technical skills (i.e. hunting, fishing, etc.) but are lacking in terms of business operations including in such key areas as bookkeeping; business administration (insurances, licenses, etc.); marketing; booking appointments; and financial and human resource management. Providing business skills training will be essential to ensuring that businesses are sustainable over time and have the ability for growth.

Recommendation 13: Provide On-site Business Development Assistance

In conjunction with business training, there is a need to provide on-site business services such as assisting with setting up bookkeeping programs; management of finances; establishing booking systems and so on. Assistance is also required to manage the administrative needs of a business such as licensing, insurances and so on. These services can most likely be provided by local or regional economic development officers, but may need to be augmented by ITI.

12. PRODUCT DEVELOPMENT

The current level of Aboriginal tourism product offering available in the NWT is extremely limited, particularly when you define a tourism product as “market-ready”. Market-ready products are the backbone of the tourism industry - they define the industry and establish the destination’s appeal as a vacation option.

It is evident that the NWT contains world-class natural and cultural features and attractions. It is also evident that the NWT suffers from an acute shortage of market-ready Aboriginal tourism products. A shortage in tourism products also has a trickle-down effect and impacts areas such as packaging and marketing. Without a sufficient inventory of market-ready products, it is impossible to build the packages that travelers are requesting, it becomes difficult to market a region or a destination and it is a challenge to compete with other Canadian and international destinations.

The development of tourism products in the NWT is hampered by factors such as:

- a lack of critical mass of tourists necessary to sustain tourism businesses especially at the start-up stage
- in many communities, there is very little interest in starting a tourism business or being involved in the tourism industry
- potential tourism business operators lack skills and knowledge in the areas of small business management and operations, the tourism industry, accounting, marketing, product packaging and market research
- there is a lack of professional development resources available to existing and potential operators
- there is a lack of communication between businesses and between business and government
- it is extremely difficult for an individual to obtain financing for a tourism business
- a career in tourism is not seen as favourable to young workers especially when compared to careers in the oil, gas and mining industries
- those that might be interested in developing tourism products or getting started in the tourism industry do not know what is needed or where to go to get assistance.

In order to spur growth of Aboriginal tourism products, it is important to first understand the current status of Aboriginal tourism products within the NWT. The Project Team adapted a model developed by the Aboriginal Tourism Association of BC,

to categorize Aboriginal tourism products in the NWT into the following three developmental stages:

Stage One – Start-up

This stage of “product” is

defined as underdeveloped where the potential of capitalizing on local natural assets could be developed into viable Aboriginal tourism products. The Project Team found that the majority of NWT Aboriginal products to be in this stage of development. This group may also include community organizations that hope to establish their community as

a tourist destination. Assistance in this stage focuses on awareness, opportunity identification, education, training and business preparedness.

Inuvik Church



Stage Two – Existing, but not Market Ready

Existing Aboriginal tourism products include outfitters, etc. that currently have products but that are not offered/available on a consistent basis and/or there are clear gaps in market standards, hospitality and service levels. This stage may also include businesses that have just been started as well as existing operators that are interested in expanding their products. Organizations, businesses and individuals are familiar with general business operations and have an understanding of the tourism industry, but lack market ready product. Assistance in this stage focuses on product development.

Stage Three – Market Ready Product

Market ready includes Aboriginal tourism products that satisfy market demand, comply with standards and could be fully integrated into a destination marketing program. Assistance in this stage focuses on marketing support and provides a clear path for participating in NWT tourism programs.

Support for product development and marketing assistance would be tailored to each stage of development and would depend on the organization or individual progressing through each stage in subsequent order. As an example, product development assistance for businesses/individuals provided for in Stage 2, will only occur when suppliers have participated in the first stage of development – training, education, industry readiness (or have demonstrated understanding of this Stage).

In order to define market ready product (to qualify as Stage 3), product standards will have to be developed as part of the Aboriginal Tourism Strategy.

Criteria will need to be compared against current licensing requirements and could include the following:

- must offer an authentic Aboriginal cultural tourism experience
- there must be a consistent point of contact with national communications capability and the ability to accept reservations by fax, email and phone
- a printed brochure of product and consideration of the development of a website offering information on the product
- if the business is a seasonal operation, it must be open and operating for the entire length of the main tourism season
- the operation must have a multi-tiered rate system in order to support wholesale/retail and consumer direct purchases
- the operation must demonstrate quality, accuracy and consistency in product delivery
- the operation must carry adequate insurance.

Throughout the consultation process, the Project Team heard from respondents suggesting potential Aboriginal tourism products. An important and critical distinction regarding the identification of potential Aboriginal tourism products within the NWT is the fact that our findings are based on input from NWT stakeholders (Aboriginal organizations, tourism outfitters, communities, Parks, etc.) and therefore do not reflect market demand.

As stated earlier, a market-driven approach to tourism product development is critical and ensures that products are grounded by consumers and travel influencer's preferences. Therefore the following list of *potential* tourism products reflects the recommendations of northern stakeholders.

Focus Group respondents listed the following product themes by Region as opportunities for development:

REGION	PRODUCT THEMES:
Inuvik	Whaling camps, Dempster Highway, Ice Road Tours, Great Northern Arts Festival, Rivers/Canoeing/Delta Boat Tours, Arctic Ocean/Pingos, Community/Historical/Cultural Interpretation
Sahtu	Mackenzie River, Great Bear Lake fishing, Canol Trail, Hunting, Arts & Crafts (beading, tanning), Community/Historical/Cultural Interpretation
North Slave	Fishing, Hunting, Aurora Viewing, Festivals/Events, Dogsledding, Community/Historical/Cultural Interpretation
Deh Cho	Nahanni National Park – Hiking, Camping, Boating; Hunting, Fishing; River tours; Community/Historical/Cultural Interpretation
South Slave	Wood Buffalo National Park, Canoeing, River Tours, Community/Historical/Cultural Interpretation

The concept of community tours that would highlight local historical and cultural significance was brought forward by many focus group participants. However, from a market perspective, this type of product offering is most valuable as an add-on product, designed to enhance the visitor's experience once in the community. Such experiences should be incorporated into mainstream tours as unique complements to existing products. For instance, a canoeing expedition on one of the river systems within the NWT could be enhanced with Aboriginal interpretation and cultural insights of the community that is part of the staging of the canoeing expedition.

A complete product development plan must be included in the Aboriginal Tourism Strategy. Product development recommendations would be based on product-market match analysis. Each potential product will have to be defined in the strategy along with a blueprint to map out its development – including an assigned level of overall importance and priority in order to determine the level of investment required.

The 2005 NWT Inventory and Gap Analysis Final Report was commissioned to define the status of tourism products in the NWT. It outlines areas of product potential by listing existing industry suppliers and NWT assets – the gap pointing to potential product starts. This inventory could be used as a starting point for the development of the product development plan within the Aboriginal Tourism Strategy.

However, it is important to point out that a successful product development plan can only occur after Industry development and capacity building have occurred – creating a higher degree of success since the elements required to deliver a successful product will already be in place – industry understanding, hospitality training, human resource capacity, etc., all fully supported by market research.

And finally, an excellent tool for assisting in the development of the Aboriginal tourism industry is a publication entitled, “Tourism Development Handbook for the Northwest Territories”, published by Industry, Tourism and Investment. The handbook is designed to help assess, plan and implement tourism projects and is geared towards the first-time business operator who may not be familiar with the development process in the NWT. This tool can be used during the implementation phase of the Aboriginal Tourism Strategy.

Recommendation 14: Develop Product Standards.

Product standards are required in order to ensure quality, market-driven products are developed, and to assist defining Aboriginal tourism products.

Recommendation 15: Promote Awareness of Aboriginal Tourism Product/Business Opportunities.

Very little information is available within communities and the tourism industry regarding the potential of Aboriginal tourism. Promoting awareness of opportunities among aboriginal and non-aboriginal organizations will help to foster the development and identification of potential tourism operators, businesses, products and partnerships.

Recommendation 16: Classify Existing “Products”.

The classification of Aboriginal tourism products by stage of development will assist in determining the level of assistance required, in addition to helping to define gaps and priorities as determined by market research. The Aboriginal Tourism Strategy should define which product areas are given priority based on an agreed upon level of return.

Recommendation 17: Streamline and Centralize all Tourism Licensing Requirements.

Many respondents indicated the licensing process was cumbersome and obtaining a license renewal was particularly frustrating. The requirement to re-apply for a tourism license when an additional service was being added to an existing tourism operation seemed excessive. In addition a centralized approach to all licensing requirements was considered ideal – currently operators are required to respond to several different agencies at the Federal, Territorial, Regional, and Community level. A complete review of tourism licensing requirements, licensing agencies and processes is required in order to streamline and centralize functions to the degree possible.

Recommendation 18: Provide Individual Product Development Assistance

While there is value in providing product development workshops to provide assistance in developing Aboriginal tourism products, there is also a real need to provide direct, one on one assistance to individuals/businesses that are at the product development stage. Operators/businesses that have progressed through the industry development and capacity building phases would be qualified for individual assistance to develop market ready products.

13. MARKETING AND COORDINATION

As stated earlier, there is a requirement to conduct and/or access specific market research to better understand the demand for Aboriginal cultural tourism products among visitors to the NWT. Visitor data for Canada, Yukon, and BC should be supplemented in order to provide Aboriginal organizations, the GNWT and the NWT tourism industry in general with current, relevant and local data to use as a resource in Aboriginal tourism planning and development. A strategy to develop this sector must be market driven and therefore supported by current and relevant market data.

The Project Team has previously recommended conducting analysis of the market. This data will be used to form the basis for developing an Aboriginal tourism strategy in addition to directing the marketing efforts and expenditures needed to promote an Aboriginal tourism sector.

Without conclusive data available to define specific market characteristics of visitors interested in NWT Aboriginal tourism, the Project Team identified the following highlights from studies conducted by the Yukon Government and the Aboriginal Tourism Association of B.C.

- age, or generation, appears to be a particularly important variable, with baby-boomers consistently making up a large proportion of cultural tourists
- studies in the Canadian context have also found that those travelers interested in Aboriginal tourism tend to be those with greater than average incomes and levels of education (Lang Research, 2007, O'Neil Marketing & Consulting et al., 2005)
- as stated throughout the document, Aboriginal tourism is seen primarily as an enhancement to tour offerings already available, and interest from a market can be further classified as those that:
 - are interested in a "taste" of Aboriginal culture;
 - want an adventure, sightseeing or general touring experience that is enhanced by the additional element of Aboriginal interpretation;
 - have a specific interest in Aboriginal culture and a preference for a more extensive and interpretive experience (while high yield, this group probably represents only a small share of the potential market);
 - are completely unaware that Aboriginal culture exists and in some instances do not even understand what the words Aboriginal or First

Nations mean (these are visitors that may unexpectedly discover an Aboriginal cultural tourism experience)

- Research suggests that the greatest opportunity for revenue growth is among visitors looking for a taste of Aboriginal culture or Aboriginal culture as an enhancement to their overall tourism experience.

The NWT Tourism Association is the Destination Marketing Organization (DMO) for the NWT and is responsible for pan-territorial tourism marketing activities that include advertising, production of travel guides, maintaining the tourism toll free and fulfillment service, media and trade relations, trade show attendance and providing tourism member services and programs. The organization responds to market ready products by promoting specific sectors to the various target markets.

Focus group participants in all regions stated that they did not feel represented by the NWT Tourism Association. When prompted to list organizations involved in the promotion and marketing of the NWT tourism industry, in some cases NWTT was not mentioned, and in all cases, the Association was perceived as being a Yellowknife based marketing agency.

Marketing was cited as one of the challenges facing the Aboriginal tourism industry. While respondents suggested the creation of an Aboriginal Tourism Association, with the responsibility for marketing Aboriginal tourism products, it is not recommended that Aboriginal tourism products be marketed separate from mainstream tourism products in the NWT.

From the perspective that visitors are looking for a “taste” or an enhancement to existing products, the challenge of marketing Aboriginal tourism products may in fact be rooted in creating awareness of Aboriginal tourism products to a market already visiting the NWT versus strategies to promote the NWT as an Aboriginal tourism destination. Success is more likely to come from working with existing NWT tourism operators and promoting products to tourists already visiting the NWT as well as local residents.

In addition, due primarily to the fact that work required to develop an Aboriginal tourism industry is largely centred on development work – industry understanding, capacity building, community preparedness, human resource training, business training, etc., - the need for a greater focus on marketing Aboriginal tourism products is best addressed through the development of an Aboriginal Tourism marketing plan as part of the Aboriginal Tourism Strategy. Elements of the plan will include the identification of

markets, Aboriginal product positioning, brand development, a marketing mix, distribution channels and budget.

While a critical component of the development of a marketing strategy is to promote Aboriginal tourism products throughout the NWT, just as importantly, operators delivering Aboriginal tourism products must have a much better understanding of who their market is; what products and services the market is looking for in terms of Aboriginal or cultural tourism; how to develop products and services to meet the needs of this market; how to effectively promote their products and services; and how to deliver quality programs and services that meet market expectations.

A part of the marketing strategy will be to identify the proper marketing channels based on the target audience. For example, the travel trade and NWT tourism operators will need to be reassured that Aboriginal tourism suppliers will be able to meet certain standards related to insurance, reliability (endorsement by DMO), competitive pricing, commissions and the capacity to handle groups.

Recommendation 19: NWTT To Promote Awareness Of Aboriginal Tourism, In Addition To Market Ready Aboriginal Tourism Products.

Since Aboriginal tourism is in the very early stages of development, and most products do not qualify as market ready, NWTT should be encouraged to promote awareness of Aboriginal tourism. The Association should create an Aboriginal tourism sector to support the awareness of Aboriginal tourism, until such time that market ready products are available for sale. Where market ready products exist, these should be highlighted in the sector advertising.

Recommendation 20: Develop A Marketing Plan As Part Of The Aboriginal Tourism Strategy.

A marketing plan should be developed in conjunction with the development of the Aboriginal Tourism Strategy and should address the following marketing challenges:

- lack of a unique NWT Aboriginal brand and positioning statement
- limited partnerships with mainstream NWT tourism operators and businesses
- limited market awareness of Aboriginal tourism products and opportunities

Recommendation 21: Develop Marketing Skills Development Programs.

During the development and implementation of the Aboriginal Tourism Strategy, incorporate marketing skills programs – workshops, marketing plan templates, and the provision of marketing expertise to assist Aboriginal businesses or suppliers in developing individual marketing strategies.

Fishing in the NWT



14. CONCLUSION

Tourism is a key sector of the Northwest Territories economy and contributes more revenue than all other renewable resource sectors combined. The Aboriginal Tourism Engagement Strategy provides the basis for understanding the possibilities of Aboriginal Tourism and developing a multi-year strategy for developing the industry.

The Project Team conducted background research that included contacting key stakeholders to gain a basic understanding of current tourism projects and initiatives as well as challenges and barriers to Aboriginal tourism development. Industry documents were analyzed and a survey was developed to gather additional information from a wide range of respondents. Regional consultation sessions were conducted (in-person meetings and focus groups) to learn firsthand the challenges facing this fledgling sector.

The results of the research and consultations demonstrate that Aboriginal tourism is at the beginning stage of development. In order to foster a true Aboriginal tourism industry, a strategic and phased approach must be implemented. In developing this approach, the following must be taken into consideration:

- there is considerable interest in developing an Aboriginal tourism sector
- a significant investment of time and resources will be required to develop an Aboriginal tourism sector and the returns may not be realized for a period of time
- the benefits of developing an Aboriginal tourism sector have to be defined in broad terms and include the value of protecting and reinvigorating Aboriginal cultures and traditions, community economic development and enhancement of the NWT tourism industry
- a Lead Agency is required to oversee and champion the development of an Aboriginal tourism sector
- a multi-year strategic plan is required to define a clear vision, principles, goals and objectives and a framework for moving forward. The Strategy must be market driven, reflecting the needs and demands of an identified market.
- in the early stages, the majority of work will focus on creating an understanding of the basic tenants of the tourism industry and small business administration, community and operator preparedness, establishing industry standards, developing partnerships and supports, and human resources capacity building and hosting skills
- once the industry is ready – product development will occur – creating products and packages from the NWT's world class natural assets and

cultural features that can be sold to a market through the travel trade or directly to consumers

- a marketing plan, backed by solid market research, will guide the promotional efforts of this sector and will position Aboriginal tourism as a significant enhancement to the NWT tourism industry
- throughout the process, Aboriginal people must play a meaningful role in all stages of the sector's development.

An Aboriginal tourism sector has the potential to enhance and contribute to the growth of the NWT tourism industry. In fact, the development of this sector, at this time, may be ideal given the changes within the NWT tourism industry, and market trends favouring demand for authentic, experiential products. In order to bring this to fruition, a well resourced, strategic and practical approach is required such as outlined in this analysis.

15. APPENDIX A – SUMMARY OF RECOMMENDATIONS

Recommendation 1: Identify a Central Organization or Lead Organization or Agency

It is highly recommended that a champion organization be identified to develop and oversee the Aboriginal tourism strategy. Without such an organization, it is doubtful that Aboriginal tourism can become a viable sector of the NWT tourism industry.

Recommendation 2: Develop a Multi-year Aboriginal Tourism Strategy.

It is recommended that a multi-year Aboriginal Tourism Strategy be developed by a group of stakeholders that includes Aboriginal organizations, tourism operators, and others with a vested interest in developing the Aboriginal tourism industry.

Recommendation 3: Establish a clear definition of Aboriginal Tourism

As part of the Aboriginal Tourism Strategy, it is essential to establish a clear definition of Aboriginal tourism. The definition will establish the types of business and organizations that qualify for resources and support under the Aboriginal tourism strategy; provide a framework for developing and marketing products and services; and provide visitors with an understanding of what they can expect from an Aboriginal tourism experience in the NWT.

Recommendation 4: Conduct an Analysis of the NWT Aboriginal Tourism Market

As part of this analysis, the Project Team undertook an analysis of the NWT Aboriginal tourism market; however, a more in-depth understanding of the market is required. It is therefore recommended that a specific study of the market and the expectations of tourists and visitors be completed.

Recommendation 5: Develop and Deliver Aboriginal Tourism Orientation Workshops

It is essential that individuals, businesses and communities understand all aspects of the tourism industry including meeting market demands; product development; marketing; and operations. It is just as important to ensure that communities as a whole understand and value tourism and that efforts are made to make communities tourism friendly. Aboriginal tourism orientation workshops are therefore required to ensure that those interested in the industry have a full understanding of what is involved in developing a viable product and business.

Recommendation 6: Develop Industry Standards and Certification

It is essential to develop standards for the Aboriginal tourism industry. Standards can be used to set an expected level of service; ensure availability and commitment of operators; establish business and human resource requirements; and ensure that Aboriginal tourism businesses are operating in an authentic, safe and effective manner. Standards can also be used for capacity building and as a marketing tool.

Recommendation 7: Define Partnerships and Supports

For the strategy to be effective, both ITI and the NWTT should be partners in the development and marketing of Aboriginal tourism. The specific roles and responsibilities of each organization will have to be established, however, it is recommended that ITI work closely with the Lead organization to develop the industry and specific products and services. It is also recommended that the NWTT work with the Lead organization to promote Aboriginal tourism products once they are market-ready. As sufficient products are developed, Aboriginal tourism should be recognized as a sector under the umbrella of NWT tourism by the NWTT.

Recommendation 8: Establish an Aboriginal Tourism Subsidy Program

It is recommended that the GNWT consider establishing a subsidy program to allow Aboriginal tourism entrepreneurs with the resources required to develop a viable tourism business. Strict guidelines will have to be placed on the subsidy program to ensure that funding flows to those with a serious interest in tourism and the potential and commitment to develop a viable product.

Recommendation 9: Develop Occupational Standards

There is a need to develop occupational standards for key positions in the tourism industry. Occupational standards have become the basis for establishing expected levels of training and professionalism for a range of industries including the tourism industry.

Recommendation 10: Establish a Hosting Skills Program

The Project Team was informed that many people involved in the Aboriginal tourism industry, either as business owners or as employees, did not have the required level of hosting skills. These skills include ensuring that facilities are clean and well cared for; interacting with visitors and tourists; and ensuring that tourists have a positive experience. An Aboriginal Tourism Hosting Program is needed to set the standard for hosting tourists and to provide much needed training in this area for business owners and staff. Businesses and employees who complete the program can promote themselves as meeting the expected level of service.

Recommendation 11: Aboriginal/General Tourism Skills Program

Many interested in the tourism sector may not have the requisite Aboriginal Tourism Skills. There is a need to enhance the technical skills of many operators and employees including in such areas as hunting and fishing guides; arts and crafts; traditional lifestyles and so on. This is particularly true for young people who may not be fully familiar with traditional skills.

Recommendation 12: Develop a Business Skills Program

There is a critical need for the development of business skills for Aboriginal tourism operators. Many operators have the technical skills (i.e. hunting, fishing, etc.) but are lacking in terms of business operations including in such key areas as bookkeeping; business administration (insurances, licenses, etc.); marketing; booking appointments; and financial and human resource management. Providing business skills training will be essential to ensuring that businesses are sustainable over time and have the ability for growth.

Recommendation 13: Provide On-site Business Development Assistance

In conjunction with business training, there is a need to provide on-site business services such as assisting with setting up bookkeeping programs; management of finances; establishing booking systems and so on. Assistance is also required to manage the administrative needs of a business such as licensing, insurances and so on. These services can most likely be provided by local or regional economic development officers, but may need to be augmented by ITI.

Recommendation 14: Develop Product Standards.

Product standards are required in order to ensure quality, market-driven products are developed, and to assist in the definition of Aboriginal tourism products.

Recommendation 15: Promote Awareness of Aboriginal Tourism Product/Business Opportunities.

Very little information is available within communities and the tourism industry regarding the potential of Aboriginal tourism. Promoting awareness of opportunities among aboriginal and non-aboriginal organizations will help to foster the development and identification of potential tourism operators, businesses, products and partnerships.

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The classification of Aboriginal tourism products by stage of development will assist in determining the level of assistance required, in addition to helping to define gaps and priorities as determined by market research. The Aboriginal Tourism Strategy should define which product areas are given priority based on an agreed upon level of return.

Recommendation 17: Streamline and Centralize all Tourism Licensing Requirements.

Many respondents indicated the licensing process was cumbersome and obtaining a license renewal was particularly frustrating. The requirement to re-apply for a tourism license when an additional service was being added to an existing tourism operation seemed excessive. In addition a centralized approach to all licensing requirements was considered ideal – currently operators are required to respond to several different agencies at the Federal, Territorial, Regional, and Community level. A complete review of tourism licensing requirements, licensing agencies and processes is required in order to streamline and centralize functions to the degree possible.

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While there is value in providing product development workshops to provide assistance in developing Aboriginal tourism products, there is also a real need to provide direct, one on one assistance to individuals/businesses that are at the product development stage – having progressed through the industry development and capacity building phases.

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Since Aboriginal tourism is in the very early stages of development, and most products do not qualify as market ready, NWTT should be encouraged to promote awareness of Aboriginal tourism. The Association should create an Aboriginal tourism sector to support the awareness of Aboriginal tourism, until such time that market ready products are available for sale. Where market ready products exist, these should be highlighted in the sector advertising.

Recommendation 20: Develop A Marketing Plan As Part Of The Aboriginal Tourism Strategy.

A marketing plan should be developed in conjunction with the development of the Aboriginal Tourism Strategy and should address the following marketing challenges:

- lack of a unique NWT Aboriginal brand and positioning statement
- limited partnerships with mainstream NWT tourism operators and businesses
- limited market awareness of Aboriginal tourism products and opportunities
- varying stages of marketing support required – as products are developed the marketing of this sector d approach that identifies activities that can be accomplished in the short, medium and long term.

Recommendation 21: Develop Marketing Skills Development Programs.

During the development and implementation of the Aboriginal Tourism Strategy, incorporate marketing skills programs – workshops, marketing plan templates, and the provision of marketing expertise to assist Aboriginal businesses or suppliers in developing individual marketing strategies.

16. APPENDIX B – ABORIGINAL TOURISM ENGAGEMENT STRATEGY SURVEY FORM

The Department of Industry, Tourism and Investment (ITI) has contracted Allan Twissell of NorthWays Consulting and Kelly Kaylo to work with Aboriginal organizations, the tourism industry and other stakeholders to develop an Aboriginal Tourism Engagement Strategy.

The objectives of the Strategy are to hold discussions and consultations on:

- the benefits of tourism
- barriers to developing tourism businesses
- trends in Aboriginal tourism
- tourism statistics
- new or enhanced products and services that could be developed
- obstacles and barriers to product development, and
- new or expanded markets that could be targeted.

As part of the project, we are conducting a survey of stakeholders and community members to determine the status of Aboriginal tourism in the NWT.

This survey is confidential. The results of this survey will be compiled with all other surveys for reporting purposes.

If you have any questions or comments about the survey or the assessment, please contact:

Allan Twissell
(867) 873-5444 (telephone)
(867) 873-2384 (fax)
northways@theedge.ca (e-mail)

Kelly Kaylo
(867) 873-2103 (telephone)
kkaylo@theedge.ca (e-mail)

Thank you for your participation.

Organization Information

Name: _____

Organization: _____

Title: _____

Community: _____

Contact
Number: _____

Date: _____

1. What do you think will be the cultural benefits and impacts of increased Aboriginal tourism in your region? *(Please give your answers in the appropriate box provided beside each statement.)*

Aboriginal tourism in the region will result in:	Strongly Disagree	Moderately Disagree	Uncertain	Moderately Agree	Strongly Agree	Don't Know / NR
a) Availability of more Aboriginal cultural facilities and activities in the region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Loss of Aboriginal culture and traditions due to the presence of visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) More opportunities for Aboriginal people to learn about their own culture and traditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) More opportunities for Aboriginal people to learn and practice traditional arts and crafts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) More pressures on local facilities and services (such as community centres or local businesses)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Visitors in the community affecting residents' enjoyment of traditional lifestyles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Increased pride about Aboriginal culture by showing visitors about traditional lifestyles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h) Increased pressures on the natural environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i) Increased cost of living for community members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j) Increased pride and spirit among Aboriginal members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Please list any other positive or negative changes that you feel might occur if Aboriginal tourism is developed further in your region.

3. From the list above, or for other reasons, what are the 3 **most important reasons** for encouraging Aboriginal tourism development in your region? (*Please specify*)

a) Most important reason

b) Second most important reason

c) Third most important reason

4. From the list above, or for other reasons, what are the 3 **biggest concerns** you have about increasing Aboriginal tourism in your region? (*Please specify*)

a) Biggest concern

b) Second biggest concern

c) Third biggest concern

5. Please indicate how important the following factors are in developing Aboriginal tourism?
(Please give your answers in the appropriate box provided next to each statement.)

Aboriginal tourism in the region will result in:	Not At All Important	Not Very Important	Important	Quite Important	Very Important	Don't Know / NR
a) Involving the participation of Aboriginal People as guides, cultural interpreters, managers etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Demonstrating Aboriginal techniques and methods approved by community representatives such as Elders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Showing local customs and culture to others (e.g., clothing, arts and crafts, foods, performances, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Providing opportunities for community members to review cultural tourism products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Providing guests and travel operators with pre-trip information about their Aboriginal tourism experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Taking steps to ensure that culturally sensitive places and activities are protected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Developing Aboriginal tourism managers and staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h) Making sure that all Aboriginal tourism activities are done in environmentally sensitive ways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i) Making sure that all goods and services are supplied by local and regional Aboriginal suppliers (where possible)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j) Making sure that all staff involved in Aboriginal tourism activities understand and can explain Aboriginal culture and traditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k) Making sure that there is an active and up-to date Aboriginal employee orientation program that includes cross-cultural relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l) Ensuring that the Aboriginal products and services reflect the needs of the marketplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Are there any other important factors to be considered in developing Aboriginal tourism?

7. From the above list, or for other reasons, what are the **3 biggest factors** to be considered in developing Aboriginal Tourism? (*Please specify*)

a) Most important factor

b) Second most important factor

c) Third most important factor

8. Please indicate how much potential there is for developing the following Aboriginal tourism products and services in your region. *(Please give your answers in the appropriate box provided beside each statement.)*

The potential for developing the following products and services are	No Potential	Some Potential	Significant Potential	Don't Know / NR
a) Aboriginal interpretation centres and museums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Aboriginal community tours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Aboriginal historical site tours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Aboriginal restaurants and food service businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Aboriginal accommodation services (hotels / motels, bed and breakfast homes)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Aboriginal festivals/ceremonies and other cultural events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Aboriginal outdoor/nature adventures and tours (canoeing, snowmobiling, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h) Aboriginal art galleries/crafts exhibits and opportunities to view and purchase Aboriginal arts and crafts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i) Aboriginal transportation services (e.g. taxis, air services etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j) Aboriginal live performance of arts (e.g. drum dance, storytelling, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k) Aboriginal traditional outdoor activities (hunting, trapping, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Are there other types of Aboriginal tourism products or services that could be developed in your region? *(Please specify here.)*

10. From the above list, what are the **3 products or services** that have the most potential for development in your region? *(Please specify)*

a) Product/service with the best potential for development

b) Product/service with the second best potential for development

c) Product/service with the third best potential for development

11. Which of the following are constraints to the development of Aboriginal tourism? *(Please give your answers in the appropriate box provided beside each statement.)*

Constraints to Aboriginal Tourism development:	Not A Constraint	Not Much of a Constraint	A Constraint	A Big Constraint	A Major Constraint	Don't Know / NR
Limited availability of education and awareness programs explaining the potential benefits of Aboriginal tourism to Members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited availability of training opportunities for Aboriginal persons to participate in Aboriginal tourism businesses and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited understanding of travel markets suited to visiting Aboriginal attractions, services and products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited development of business and management skills needed to participate in Aboriginal tourism ventures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited availability of financing options needed to participate in Aboriginal tourism businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited support from Aboriginal organizations for the development of Aboriginal tourism opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited resources for development of marketing plans and promotion of Aboriginal tourism attractions, products and services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited access of travellers to your region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Aboriginal Tourism Engagement Strategy
Final Report**

Constraints to Aboriginal Tourism development:	Not A Constraint	Not Much of a Constraint	A Constraint	A Big Constraint	A Major Constraint	Don't Know / NR
Limited availability of a trained Aboriginal workforce interested in working in Aboriginal tourism ventures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited availability of community infrastructure (transportation, accommodation, food and beverage services) needed to accommodate visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited receptivity/'welcomeness' in the way the Aboriginal organization /community appears to visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited land use and community planning to allow for tourism or business development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited willingness of Aboriginal leaders to support Aboriginal tourism development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited professionalism in the operation of current Aboriginal tourism businesses in your organization or region.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Please list the 3 biggest constraints that need to be overcome for Aboriginal tourism to develop in your region. *(They may be listed above or new ones, please specify)*

a) Biggest constraint

b) Second biggest constraint

c) Third biggest constraint

13. Please list three (3) kinds of Aboriginal tourism businesses that should be the priority for development in your region (*i.e. festivals, accommodation, historical site tours, etc.*).

a) First priority

b) Second priority

c) Third priority

14. What government or private sector organizations ***are currently*** the most important in supporting Aboriginal tourism development in your Aboriginal organization/region. (*Please specify*)

15. What government or private sector organizations ***could potentially play a greater role*** in supporting Aboriginal tourism development **in your community/region**. (*Please specify*)

16. Is your organization interested in attending a forum on developing an Aboriginal Tourism Strategy in April/May 2010 (tentatively to be held in Yellowknife)?

Yes No

a. If yes, when would be the best time to hold the Forum?

b. Are there any topics and/or presenters you would like to have on the agenda for the forum?

17. Do you have any other comments concerning Aboriginal Tourism?

Thank you for participating in this survey.

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17. APPENDIX C – REGIONAL CONSULTATION QUESTIONS

Regional Consultation Questions – Aboriginal Tourism Engagement Strategy	
#	Question
1	What is your definition of aboriginal tourism?
2	Does your community support the growth of aboriginal tourism?
3	What do you see as the benefits of aboriginal tourism? Let's list 10.
4	What do you see as the challenges of aboriginal tourism? Let's list 10.
5	Do you see any negative impacts as a result of increased aboriginal tourism?
6	What aboriginal tourism products exist in your community (in other communities)? Or is your community already participating in aboriginal tourism? How so? Give examples.
7	What types of aboriginal tourism products should be developed in your community or in the NWT? E.g.: ecotourism, cultural, arts & crafts, consumptive (hunting/fishing), attractions. a) Of these which present the greatest opportunities to incorporate aboriginal tourism? b) If you could only focus on 3 areas, what would they be? And in what order?
8	What is needed to support aboriginal tourism in your community and the NWT? a) Education b) Training c) Marketing d) Business skill development e) Financing f) Cultural g) Community/product development In your opinion why are aboriginal tourism products not more developed (what are the barriers)? What do you see as the 3 main important areas? What is needed to enhance these?
9	What can be done to encourage greater involvement of aboriginal entrepreneurs in the tourism industry?

Regional Consultation Questions – Aboriginal Tourism Engagement Strategy	
#	Question
10	<p>What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?</p> <p>a) What should their role be?</p> <p>b) What is missing?</p>
11	<p>What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?</p> <p>a) Website</p> <p>b) Brochures</p> <p>c) Advertising</p> <p>d) Familiarization tours</p> <p>e) Package development</p> <p>f) Work with other tour operators</p> <p>g) Tradeshows/marketplaces</p> <p>h) NWTT membership</p> <p>i) Others (describe)</p>
12	<p>Who do you think is the market for aboriginal tourism? Where do they live? Where do you get your information from? What new or expanded markets could be targeted?</p>
13	<p>Would you be interested in participating in an aboriginal tourism forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?</p>

18. APPENDIX D – REGIONAL STAKEHOLDER CONSULTATION SESSIONS

Introduction:

To ensure that Aboriginal Organizations, Industry Associations, tour operators and other key stakeholders participated directly in the development of the Aboriginal Tourism Engagement Strategy, NorthWays Consulting conducted a series of focus group and input sessions in each of the Regional Centres. A summary of the views and discussions are compiled below and organized by each Regional Centre.

In addition to the stakeholders identified in the following sessions, several NWT tourism operators, including Aboriginal tourism operators were interviewed to gain firsthand knowledge of their interests, opinions and recommendations related to the development of an Aboriginal tourism sector. These interviews provided valuable insight into the challenges surrounding the development of Aboriginal tourism products based on firsthand experience, as well as practical approaches to developing a bona fide Aboriginal tourism sector.

18.1 SAHTU REGION

Two consultation sessions were conducted in the Sahtu Region – the first involved participants from the various aboriginal organizations and self governments throughout the Region, and the second involved industry stakeholders and business associations within Norman Wells.

DATE: December 9, 2009

LOCATION: Norman Wells

Participants:

Andy Short	GNWT – Industry, Tourism and Investment
Mark Patrick	GNWT – Industry, Tourism and Investment
Warren Wright	North-Wright Airways
Rodger Odgaard	Norman Wells Land Corporation
Ethel Blondin-Andrew	Sahtu Secretariat Incorporated
Kirk Dolphus	Sahtu Secretariat Incorporated
Chief Frank Andrew	Tulita Dene Band
Brian Menacho	Tulita Dene Band
Rocky Norwegian	Fort Norman Métis Land Corporation
Archie Lennie	Fort Norman Métis Land Corporation
Judith Wright-Bird	Tulita Land Corporation
Gordon Yakeleya	Tulita Land Corporation
Valerie Yakeleya	Tulita Renewable Resources Committee
Sally Ann Horassi	Tulita Renewable Resources Committee

KEY ISSUES:

1. What is your definition of aboriginal tourism?
 - Includes aboriginal ownership and aboriginal content
 - Content to include how to set nets, track animals, arts & crafts - beading
 - Focus on aboriginal historical culture vs. current aboriginal lifestyle
 - Traditional knowledge (snares, trapping)
2. Does your community support the growth of aboriginal tourism?
 - Unanimous support

3. What do you see as the benefits of Aboriginal Tourism?
 - Employment
 - Tour guides
 - Beading
 - Elders as teachers
 - Harvesters as guides
 - Traditional knowledge
 - Protect aboriginal culture
 - Promote aboriginal culture to others
 - Teaching about the language
4. What do you see as the challenges of Aboriginal Tourism?
 - Insurance costs
 - Lack of funding
 - Unlicensed operators
 - Enforcement of regulations
 - Concern with new legislation (Coast Guard) re: boat operations
 - NWT tourism Association not regional
 - Lack of infrastructure – no park in Tulita
 - Lack of coordination among agencies – RCMP, ITI
 - No organization to support group insurance
 - Training & capacity building – how to do guiding, how to start a business,
 - Marketing, trade show attendance – cost and lack of knowledge
 - Lack of financial support
 - Who to go to for information?
 - Operators are isolated – not operating as a group
 - Bundling and packaging of products
 - High airfares
5. Do you see any negative impacts as a result of increased Aboriginal Tourism?
 - Environmental footprint
6. What Aboriginal tourism products exist in your community?

7. What types of aboriginal tourism products should be developed in your community or in the NWT?
 - Handicrafts, beading
 - Workshop for tourists (how to tan a hide)
 - Storytelling – how legends were developed
 - Language – understanding of the meaning of aboriginal language versus learning to speak an aboriginal language
 - Intellectual property rights – legends, sacred places (don't mind sharing but don't want to give it away)
 - Need to do it right – elders must approve
 - Branding is important
 - Product must be genuine, honour the culture
8. What is needed to support Aboriginal Tourism in your community and the NWT?
 - Money to develop skills
 - Money for raw materials
 - Training
 - Information on financing and borrowing
 - Mentoring with operators that attend international marketplaces to assist in transferring marketing/salesmanship skills
 - Partnering with "interpreter" – someone who knows how to interpret the cultural aspect of the aboriginal service/product
9. What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?
 - Training and education of value of tourism
10. What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?
 - ITI
11. What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?
 - Ecological appeal to markets
 - History – people searching and interested in legends
 - Internal, business traveller, government worker

12. Who do you think is the market for Aboriginal Tourism? Where do they live? What new or expanded markets could be targeted?

- European
- German
- Asian
- No mention of Canada or North America

13. Would you be interested in participating in an Aboriginal Tourism Forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?

- Product development
- Marketing and salesmanship – how to sell (trade show approach, etc.)
- How to start a business
- Internet marketing – use of technology
- Examples of successful products – e.g.: Osoyoos Band
- Regional presentations of tourism products
- Insurance
- Partnerships

14. Networking – need to coordinate with Yukon Tourism and other agencies (DMO's)

Date: December 10, 2009

Location: Norman Wells Heritage Hotel

Participants:

Tanya McAuley	Bed & Breakfast
Chris Buist	Norman Wells Chamber of Commerce
Nicky Richards	Economic Development Officer
Warren Wright	North-Wright Air
David Janes	North-Wright Air
Peggy Pouw	Historical Centre
Mark Patrick	Tourism Manager

Key Issues:

1. What is your definition of aboriginal tourism?
 - How would it benefit if not aboriginal
 - 51% ownership, joint venture, although not ownership specifically
 - Use of historical/aboriginal sites
 - As long as aboriginal is part of product it would be supported
 - Dependability issues
2. Does your community support the growth of aboriginal tourism?
 - Some resistance
 - Large issue of communities not working together
 - Keep heritage intact vs. tourism
 - Must have level of commitment
 - Overly protective
 - Norman Wells is supportive – communities fear change
3. What do you see as the benefits of Aboriginal Tourism?
 - Tourism could be used to protect/preserve culture & heritage
 - Arts & crafts development
 - Tanning of moose hides
 - Sahtu Marten – number one in the world for supply/quality (unique product)
 - Pristine/heritage
 - Teach young people the language, arts & crafts, tanning (being lost today)
 - Pay elders to teach – losing traditions
 - Tourism was stable industry – oil & gas up and down

4. What do you see as the challenges/barriers of Aboriginal Tourism?

- Transportation costs too high
- Supply issues - inability to acquire raw materials needed in the development of arts, crafts, beading, tanning (currently import hides)
- Must have reliable delivery of service – people not always available when needed
- Short season/weather
- Oil & gas jobs pay much higher than tourism employment – easier to make a living in other industries
- Insurance is very expensive (participants wondered if the NWT Tourism group insurance program still existed?)
- License is expensive (\$500); amending license is also very expensive (\$300)
- License renewals are an issue – lapsing a year (when market is down) shouldn't have to go through process and expense of getting another license. Should be able to put on hold if not used in one year
- Tourist license should cover everything/outfitter license should be all inclusive; currently need separate licenses for each activity, i.e. an operator added horse back riding to their product offering and was required to get another license even though he was already licensed to outfit for river excursions
- Communities don't work together – they compete
- Encourage people interested in tourism to joint venture with existing companies or people that have different skill sets (accounting, marketing, customer service, etc.)
- Lack of ambition in younger generation
- Advertising, marketing costs
- On their own can't get needed equipment – band together, combine with other operators
- Labour intensive – have to baby-sit tourists
- Big challenge is providing the services – arranging for accommodation, meals, transportation (receptive tour operator could handle)
- Not enough volume to provide everyday service on a full time basis; balance between their own lifestyle and hosting tourists
- Turnover of staff is high; lack of people on a regular & consistent basis; flying by the seat of our pants
- Permitting for the guides
- Lack of licensed operators

5. Do you see any negative impacts as a result of increased Aboriginal Tourism?
6. What Aboriginal tourism products exist in your community?
 - Promote quiet, rustic, isolation – bush camps
 - Rivers, lakes - no portages, no dams, straight flowing, peace & quiet
 - Arts & crafts
 - Bobby Manual – artist in Colville Lake
 - Morris Modeste – fishing trip
 - Archie Lennie – boating in Tulita
 - Peter Lafferty – Ft. Good Hope
 - Wilfred Jackson – touring
 - Judith Wright – Drum Lake Lodge
 - Spend time with elders telling stories & legends
 - Deline tapestry – genuine beadwork – high end product
 - Core group understand the business
 - Tours are currently ad-hoc – call up local person to see if they are available to take someone out on the river, wildlife viewing, etc.
 - Fossil hunts were very successful but no longer being conducted; lacked consistency
 - Not much going on in Sahtu – brochure is a starting point
 - Winter tours
7. What types of aboriginal tourism products should be developed in your community or in the NWT?
 - Tanning centre where raw materials are turned into final product – from hide tanning to making of mukluks
 - Facility along shore of river bank for canoeists, include accommodations, showers, rustic cabins, gas, water
 - Excellent producers in area of stroud, beadwork, hides (someone could be employed by GNWT to deliver workshops, demonstrations)
 - Fishing on Bear Lake
 - Canoeing – rivers (no portages), need to learn techniques from canoeing outfitters
 - Boat trips – with story telling
 - Arts & crafts
 - Canol Trail
 - Hiking tours

8. What is needed to support Aboriginal Tourism in your community and the NWT?
 - Infrastructure – tourists need to know if they can do laundry in town
 - Marketing support/training – outfitter to take to show
 - Develop a product that during training period could be sold at lower rates to help operator gain experience in hosting tourists (test products). Bring airline on board to assist in airfare costs during start-up period.
 - One person can inspire others
 - Need outlets such as the museum
 - Need someone to coordinate everything (someone dedicated to develop tour products and help fledging operators)
 - Lack of coordination, human resource to make sure it is getting done
 - Advertising, marketing of existing products – knowledge of how to promote products
9. What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?
 - Establish a cooperative to develop support services for tourists
 - Region is at step one – just beginning – need support at all levels
 - One central agency – one person to travel to communities to assist in developing tourism products – company could take a commission for developing and promoting products; act as a booking agent
 - Must be passionate about the business as it is very difficult to make a living; have to love the industry
10. What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?
 - Government
 - Arts centre in Holman
 - McPherson Tent Shop
 - NWTT part of government; doesn't do regional marketing
 - Government encourages start-up but does not provide follow-up support
11. What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?
 - Tourism marketing is mostly YK based - NWT Tourism Association seen as largely YK centric
 - Region has just completed a "Spectacular" brochure for Sahtu

- Lack of marketing of the Region

12. Who do you think is the market for Aboriginal Tourism? Where do they live? What new or expanded markets could be targeted?

- Norway (Hammer Nelson), Switzerland, Germany, Scotland (canoeing school)
- Americans
- Opportunity exists to market to schools/Universities and take school groups out on the land; spend two weeks in the bush
- Calgary YMCA – Camp Chief Hector

13. Would you be interested in participating in an Aboriginal Tourism Forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?

- Sceptical if not directly related to Sahtu product, issues, etc.
- Break-out session by Region to develop a strategy unique to their area
- Only want information related to Sahtu
- Minister should be in attendance)for duration
- Licensing, rules, regulations session
- Wouldn't be interested if just information sharing
- Need implementation sessions to develop action plans; next steps in developing an aboriginal tourism industry
- Facilitators from the Region who will know issues, products, markets, etc. – more useful than unknown entity
- Website of actual tours available
- Define markets – local, NWT, national – matched to NWT products

18.2 FORT SMITH REGION

Date: Dec. 11, 2009

Location: Fort Smith

Participants:

Laurie Young	Fort Smith Historical Society
Ria Coleman	Parks Canada
Alex Hall	Canoe Arctic
Sonny MacDonald	Artist

Key Issues:

1. What is your definition of aboriginal tourism?
 - Involvement of Aboriginal operator
 - Involves Aboriginal culture
 - Not necessarily Aboriginal owned
 - Needs to be authentic
 - Should be represented by Aboriginal persons
 - Needs to be buy-in by Aboriginal people
 - May need to teach Aboriginal presenters/operators about their culture
2. Does your community support the growth of aboriginal tourism?
 - Aboriginal community supports growth in tourism
 - Hope for growth
 - Government and tourism should work together to promote tourism, market Fort Smith together
 - Person was hired by the town to promote tourism and other events
 - Need regional tourism
 - Need a designated coordinator for the region
3. What do you see as the benefits of Aboriginal Tourism?
 - More pride in culture/community
 - More awareness about the environment
 - Protection of the environment (i.e. protect against downstream dam)
 - Economic benefits
 - Government funding
 - More people see the culture/environment more will care about it (i.e. many local people have not seen the salt plains)
 - Diversify the economy

4. What do you see as the challenges/barriers of Aboriginal Tourism?
 - Need goals
 - Apathy
 - Lot of good paying jobs, hard to find people for tourism
 - Very little unemployment
 - Other jobs provide benefits, holidays, etc.
 - Can't feed a family on tourism
 - Tourism season is bush season
 - Most can't make a living in arts and crafts
 - Not enough qualified people
 - Off the beaten track, this could also be a positive
 - Expense of travel, especially from Edmonton
 - Most traffic is tire traffic, some canoe, Hay River day trips, some fly in (fisherman)
 - Insurance/liability
5. Do you see any negative impacts as a result of increased Aboriginal Tourism?
 - Potential impacts on local environment
6. What Aboriginal tourism products exist in your community?
 - Museum
 - Aboriginal village
 - Crafts
7. What types of aboriginal tourism products should be developed in your community or in the NWT?
 - Cultural activities
 - Rafting
 - Park experience
 - Shield country
 - Hunting, camping
 - Winter activities – dog sledding
 - History, ship building
 - Wildlife tourism
 - Salt river
 - Whooping crane
 - Pelicans
 - Trans Canada Trail
 - Zipline

- Boardwalk
- Community tours
- Need community signage
- Make the road more interesting – points of interest

8. What is needed to support Aboriginal Tourism in your community and the NWT?

- Lots of support to get in the business
- Can't be a 1 year pilot project
- Need to be stable, steady
- Spend a lot of money on marketing
- Financing is of utmost importance
- Need to be aggressive in marketing
- Need to advertise, very expensive
- Government has to support the industry
- Arts and tourism must go together
- Need more support for arts and crafts
- Finding for wage subsidies, materials, NWT Arts Council
- Need to support trade shows
- holistic approach to marketing
- Work with Alberta tourism/Parks Canada
- Need tourism agencies support
- Downturn in tourism has direct impact on arts and crafts
- Lack of coordination – scrambling, Olympics, friendship festival

9. What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?

- Must be suitable for tourism
- Have people learn about their own culture
 - Significance of rapids
 - York boats
 - Chief Squirrel, signing of treaty
 - Band land
 - Whooping crane society

10. What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?

- Government
- NWT Tourism

11. What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?
 - Need combined website
 - Website needs to be more attractive
 - Tourism brochure (i.e. Alberta Aboriginal Tourism Brochure)
 - Not sure what NWT Tourism does for Fort Smith
 - Need to educate people that promote tourism
 - Need hospitality/service delivery training
 - People are friendly
12. Who do you think is the market for Aboriginal Tourism? Where do they live? What new or expanded markets could be targeted?
 - Parks has surveys
 - Extreme adventure travel
 - Mostly U.S.
 - Overseas, Germans, Italians
 - Indian days in Germany
13. Would you be interested in participating in an Aboriginal Tourism Forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?
 - Goals
 - Next steps
 - Bands in B.C.
 - Commitment from government (funding)
 - Implementation plan
 - Past success stories

18.3 NORTH SLAVE REGION

Date: Jan. 18, 2010

Location: Yellowknife – Industry Stakeholders

Participants:

Andy Hutchinson	Northern Frontier Visitors Association
Gary Jaeb	True North Safaris
Joe Bailey	North Star Adventures
Stephanie Yuill	NWT Parks

Key Issues:

1. What is your definition of aboriginal tourism?
 - Cultural activities
 - Authentic versus traditional (ski-doos, fishing with rod, women participating in hand games)
 - The apathy we see toward building aboriginal tourism may be because we define aboriginal tourism in terms of economic development. Perhaps we should define/promote it as a way of preserving a culture
2. Does your community support the growth of aboriginal tourism?
 - Lobby to recognize aboriginal tourism as a separate sector under NWT Tourism Association
 - Lobby to create a separate Aboriginal Tourism Association
 - Aboriginal tourism operators are lost – nothing to promote Aboriginal tourism as a stand alone
 - Communities are not currently aware of the potential of Aboriginal tourism – just beginning to understand economic benefit, employment opportunities, etc.
 - Communities are more focused on other priorities, like land claims
3. What do you see as the benefits of Aboriginal Tourism?
 - Doesn't have to be full time job; can keep mining job but deliver a tourism product during a season
4. What do you see as the challenges/barriers of Aboriginal Tourism?
 - Licensing – cost and process an issue
 - Education
 - Regulations and red tape
 - Funding needed to create packages, hire people, logistics

- On-going financial support – do not need another gov’t program to apply on, but rather a real investment over a 5 year period
 - Tourism is a good gov’t investment, proven over time. Tourism contributes more than all other industries combined. Gov’t support is better use of funds than constantly researching issue.
 - Industry will always require gov’t subsidization, not unlike prairie farmers, east coast fisherpeople, etc.
 - Need a core warehouse of information;
 - Information needed on funding sources, application process, etc.
 - Biggest hurdle is sustainability and vision; could see some immediate results, but is it sustainable
 - Tourism is an industry – we continue to talk about developing Aboriginal tourism but then it dies and nothing is ever done
 - Other job opportunities compete for industry operators
 - Mostly low paying, seasonal, prone to global issues – SARS,
 - Fly by night organizations that access funding and “play” at it for a summer
 - Reliable suppliers – have to show up or industry reputation is harmed
 - Competitive products in Yukon and BC
5. Do you see any negative impacts as a result of increased Aboriginal Tourism?
- None identified
6. What Aboriginal tourism products exist in your community?
- Ptarmigan hunting, berry picking – need delivery of products on a consistent basis, but no one will deliver consistently as there is not enough volume to create a living and ad-hoc doesn’t generate enough revenue for operator to consistently package
 - Got criticized for using lodges instead of traditional tents
7. What types of aboriginal tourism products should be developed in your community or in the NWT?
- Products must be market-ready
 - Need local in-community activities versus long duration packages
 - Not enough product developed
 - Aurora Village/Aurora World is back?!
 - No afternoon excursions; guided walk/hike; something reasonable/affordable for a family to do
 - Restaurants that serve aboriginal foods

- However, one operator suggested the above activities don't add money to the bottom line – doesn't generate enough money to the operator
8. What is needed to support Aboriginal Tourism in your community and the NWT?
- Aboriginal Tourism Development Officer focused exclusively on aboriginal tourism products and assistance to aboriginal industry – could be funded by ABC
 - Education
 - Sustainability
 - Aboriginal Tourism Association – will go a long way to defining need, assisting industry, creating dialogue
 - Should be a sector first under NWTT
 - Support Aboriginal operators that exist today – they are in the business and know what needs to be done – best thing gov't could do
 - Hospitality training
9. What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?
- Create Aboriginal Tourism Association will create a foundation for discussion, create a vision, add substance
 - Do not feel NWTT is representative of Aboriginal tourism; do not feel comfortable discussing concept under umbrella of NWTT (scoop ideas, mistrust)
 - Similar to French Association
 - Who would qualify as a member of Aboriginal Tourism Association? Gov't, operators
 - Association would be a stand alone organization attached to National organizations like ABC, Aboriginal Tourism Canada and could therefore access national funding
 - Aboriginal Tourism Canada has a checklist and standards
10. What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?
- NWTT although do not feel it is adequately representing aboriginal tourism
 - Mandate does not allow them to focus on cultural product; must represent other sectors
 - Regional reps on NWTT are not engaged; don't feel they belong

- Half the population of the NWT is aboriginal, need representation in industry Association

11. What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?

- Must have a website
- Brochure in hotels
- Social media
- “wheels” in hotels are actually working – have generated business
- Support existing Aboriginal tourism operators – best thing they could do
- Not sure there are any shows/marketplaces focused on aboriginal tourism

12. Who do you think is the market for Aboriginal Tourism? Where do they live? What new or expanded markets could be targeted?

- Any southern business person
- Corporate traveller
- Germany – interested in Aboriginal culture
- People who have the money to come here

13. Would you be interested in participating in an Aboriginal Tourism Forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?

- Parks presentation – what do they offer in terms of product potential and what do tourists that visit parks want in an experience
- Need more discussions like this with everyone at the table (aboriginal, non-aboriginal, operators, outfitters, marketers, etc.)
- Capacity – frustrated with regulations, licensing, cost of setting up in business, insurance (can we develop a one stop shop, as once someone is licensed no one can provide direction/assistance on where they go for insurance, etc.)
- Funding sources – application process, etc.
- Panel of large operators (successful northern operators that can provide advice on how to be successful) – e.g.: if you don’t market product (if you don’t have any customers) you will not survive.

18.4 NORTH SLAVE REGION (2ND FOCUS GROUP)

Date: Jan. 19, 2010
Location: Yellowknife – Aboriginal Organizations
Participants:
Alex Nitsiza Tlicho Investment Corporation
Mike Nitsiza James Company Ltd.
John Carter Yellowknives Dene First Nation
Randy Bergen Community Government of Gameti

Key Issues:

1. What is your definition of aboriginal tourism?
 - Cultural experience
 - Guided by people that have a connection to traditional/cultural way of life
 - Aboriginal people must get something out of it
 - Aboriginal tourism is at ground zero – a handful of successful operators throughout the NWT
2. Does your community support the growth of aboriginal tourism?
 - Most communities are dry and will not attract tourists
 - Minority view – do not want tourists (white guys) running around their community
 - Wrigley/Lutselke – not supportive (short of teachers); tough communities
 - Resistance from some communities
3. What do you see as the benefits of Aboriginal Tourism?
 - Tourism is a means to bridge culture and generation gap
 - o On-the-job training, elders training – will get more buy-in
 - Engage elders in development of tourism
 - Provides a means of wage economy not tied to gov't grant
 - Will help build capacity in the community – services (cooks), transportation logistics, hire elders
 - Maintaining traditional knowledge
 - Bridge relationships
 - Sustainable economics
 - Sustainable renewable resource – eventually the mines will close

4. What do you see as the challenges/barriers of Aboriginal Tourism?
 - Sport fishing licenses are hard to get (have to go to YK to get a license)
 - Lack of guides and training
 - Marketing/advertising
 - No training for ecotourism guides
 - Aboriginal people don't like it when aboriginal people succeed (will try to push them down). Hard to achieve personal goals due to jealousy, personal agendas
 - Business training – Revenue Canada, GST, taxation, bookkeeping, gov't regulations
 - Economics – to set up guide training programs
 - Start-up costs
 - World economics – recession (decrease in disposable incomes)
 - Limited hotel space in communities
 - Competition – destinations with better products
 - Competition – between communities/regions/within community
 - Cost of travel
 - Hunting restrictions
 - Need to build – today at ground zero
 - Hardly any advertising or marketing taking place
 - Money is easier to follow than your heart
5. Do you see any negative impacts as a result of increased Aboriginal Tourism?
 - Environment – footprint
 - Tourists can impact on culture
 - Climate change – ice roads could be changed to all weather roads
 - Pressure on environment
 - Roads – some were against (Tlicho region)
 - Dry communities – (alcohol could come into community)
 - Support – depends on how you present it as there has to be a payback; must meet with elders and youth
 - SAIT – Aboriginal Leadership Development Program (ALDP)
 - Diavik program – select employees to upgrade their skills – mining created opportunities
6. What Aboriginal tourism products exist in your community?
 - Dene village
 - Cross country skiing opportunities

- Natural resources
- Scenery
- Fishing
- Winter road
- Had a fishing lodge but wasn't successful due to inability to consume alcohol
- WAVE – welcome all visitors enthusiastically – everyone got a t-shirt with WAVE
- Lakes – Whati
- Falls
- Very little currently available
- Some start-up; lots of opportunity
- Alex has a B&B but needs work
- Gameti – fly fishing paradise
- Whati – water rafting
- Behchoko – hunt buffalo
- Wekweètì – Walk to the Tree line (5 mins. From community)
- Germans in the summer

7. What types of aboriginal tourism products should be developed in your community or in the NWT?

- See response to #6 as the majority of the products mentioned are not yet developed or available as a package
- Day trips
- Photography market – Tlicho have an eye for photography
- Need to categorize:
 1. Market ready – very few in NWT
- Un-packaged; not market ready – some

8. What is needed to support Aboriginal Tourism in your community and the NWT?

- Look at each community to determine what is marketable/unique
- Community needs to support business – education workshops, develop pro-business policies
- Community must be strong
- Must have right attitude
- Community must be educated and must support
- Need a band resolution
- People thank for doing work
- Dollars (seed money, start-up, advertising, training)

- Need assistance to create a web page
 - Marketing
 - Financing
 - Training is needed
9. What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?
- Build self esteem among Aboriginal people
 - Attend workshops
 - Go to schools and start educating them on business opportunity and tourism as a career
 - How to understand business
 - Need a support arm (model to assist)
 - Regional models eg: YEV – YVQ; YSM – YHY, YFS;
10. What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?
- Hard to get aboriginal people on board; not sure if aboriginal people are represented anymore
 - Need own organization
 - Tlicho will put forward a community needs assessment
 - Tourism – doesn't deal with lands
 - Chamber of Commerce – but only for Behchokö; need one for all communities
 - NWTT – voluntary membership and board
 - o Doesn't do anything for Aboriginal tourism; no support
 - o Used to have problems with 6 reps on the board (probably so they could get gov't funding)
 - o Maybe they could help promote Aboriginal tourism
 - o Interest seems to be mostly YZF based
 - Could form their own Aboriginal tourism committee
 - Develop a mentor program to help get people involved – use business people already in tourism business. Find Role Models!
 - Career day
 - Increase interest
 - New business opportunities
 - School based programs; how to attract more people into the industry

11. What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?
- Word of mouth
 - Pictures of Gameti (beautiful community)
 - Post pictures on the internet
 - “come and catch your own dream”
 - Facebook accounts – experience yourself develop your photo skills
 - Theme: northern scavenger hunt – get a stamp from all communities
 - Opportunity to market each community to determine potential product/would have to differentiate unique product, but must include all communities
12. Who do you think is the market for Aboriginal Tourism? Where do they live? What new or expanded markets could be targeted?
- Germany – 3,000 clubs interested in cowboys & Indians (ready-made market)
 - Dress up as Aboriginal people in Germany
 - Whati rapids, waterfall, good fishing
 - Canada (concern with growing travel restrictions)
 - Americans – but not coming to Canada due to recession
 - China – Alex was on a trade mission to China
 - Could partner with Aurora Village
 - Business travelers are a large source of visitors
13. Would you be interested in participating in an Aboriginal Tourism Forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?
- Would send a rep
 - Wonderful opportunity to meet other people in the tourism industry
 - Community Rep would see a need
 - Topics:
 - History of Aboriginal Businesses – how many were there, how many were successful, what happened, where did they go?
 - What goals are you trying to achieve
 - Jealousy – need people in the right frame of mind – important on how people are invited to attend
 - What is available in communities – what are the opportunities, pros & cons, barriers

- What resources are there to help tourism – dollars, training, marketing support, partnering opportunities
- Strengths & weaknesses
- Advice sessions – elders, respected participants ask questions of others
- Need more consultations – need more interest

18.5 INUVIK REGION

Date: Feb. 16, 2010

Location: Inuvik – Industry Stakeholders and Aboriginal Organizations

Participants:

Darlene Burden	Town of Inuvik
Paul Grech	Industry, Tourism and Investment
Pat McKinnon	Gwich'in Tribal Council
Kyle Taylor	Up North tours
Adriana Bacleschi	Parks Canada
Gerry Kisouin	Parks Canada
Judith Venaas	Industry, Tourism and Investment
Christine Boyde	EDO, Tuktoyaktuk (afternoon session)

Key Issues:

1. What is your definition of aboriginal tourism?
 - Authentic product, delivered and showcased by aboriginal people
 - Pursuit of traditional activities
2. Does your community support the growth of aboriginal tourism?
 - Some aboriginal people support/some don't (50/50); individuals not communities
 - Eg: can't just stop at any camp site, aboriginal people want to maintain their personal fishing/hunting sites that are not "open" to tourists
 - All Gwich'in communities support tourism - Chiefs
3. What do you see as the benefits of Aboriginal Tourism?
 - Jobs
 - Maintain traditional lifestyle which is now very expensive to do in terms of gas, equipment, etc.
 - Self reliance/sustainability of traditional pursuits
 - Diversify economy
 - Do not have destination "status" with National tourism associations
 - Some interest from individuals but don't have skills to pursue
 - Prosperity, confidence in culture, community pride

4. What do you see as the challenges/barriers of Aboriginal Tourism?

- Pricing is difficult especially as weekenders price based on covering their costs for that trip while operators have to price to cover overhead costs and full operation
- Need guidelines on what can be offered; need standards
- Skills – business
- Land claim process – must consult with everyone before they can get a license, etc. and existing operators would not support due to increased competition
- Lack of product – have hanging fish but no one can see it or it is not packaged
- Must designate which camps can be stopped at
- Don't have a NWT brand like Nunavut and the Yukon do
- Not enough business to make an income – breakeven at best
- Cost of living/doing business
- Seasonality – season too short
- Marketing/advertising costs are high and have no idea how to market
- Transportation costs are high
- Tourist won't just come for a skidoo ride, but have to start small, but then not enough volume to be viable
- Not enough things to do (product)
- Need support from ground up all along the way – subsidization required
- Pricing is challenging – based on number of people taking the trip however never know how many people will book. Can't advertise price unless number of people is known (volume!)
- Lack of business experience – administration is huge challenge especially when expertise is in the delivery of tour activity
- Forms/applications are difficult – IRC forms used for screening – need to provide assistance to fill out
- Parks Canada have forms – must apply every 5 years
- Yukon has forms due to Herschel Island and other areas
- 90% of revenue comes from drop ins versus longer packaged tours
- Financing – gov't programs designed to screen out people who are most likely to succeed. Applicant must prove they need it. Tends to fund poorest individual and not someone is likely the better entrepreneur
- Volume needed to price product so that it is affordable

5. Do you see any negative impacts as a result of increased Aboriginal Tourism?
 -
6. What Aboriginal tourism products exist in your community?
 - Actual Products:
 - Hunting Muskox
 - Up North Tours – boat trips, Herschel Island whaling camp
 - Arctic Chalet – dogsledding, hiking
 - Siulig Tours - Delta Boat tours
 - Midnight Express – delta boat tours
7. What types of aboriginal tourism products should be developed in your community or in the NWT?
 - GNAF
 - Dempster Highway
 - Aboriginal Day (June 21)
 - Muskrat Jamboree – not other spring festivals as their date changes every year
 - Aviation tours
 - Cultural tours
 - Boat one way/fly the return to Tuk
 - Rentals for Dempster – drop off costs too high, must drive both ways
 - Ice road tours
 - Cultural overnight camping tours at cabins – ice fish
 - Sunrise Festival
8. What is needed to support Aboriginal Tourism in your community and the NWT?
 - 1 or 2 umbrella organizations – organization supports individual operator by doing the paperwork, maintaining the insurance policy, booking tourists, marketing support, etc. Individual delivers product on the land.
 - Needs to be supported for 3 year period then on their own; minimum of three years so that business has a chance to succeed
 - Funding should be provided to product offering not individual
 - Quality should be supported and promoted
 - Need standards and guidelines
 - Who monitors? Operators have old websites that are out of date – not operating, wrong prices, wrong contact information, advertising products that don't exist

- Tourism society should set standards
- Need an Aboriginal Tourism Association
- Consistency – pricing, information, licensing (helps monitor/ensure good products)
- Licensee – ITI regulates but need to receive letter from communities affected to identify infractions
- Training – business skills, hospitality (Northern Most Host program), interpretive skills, guiding skills
- Product Development – what is a tourist product? Market Ready?
- Mentoring – hands on assistance needed, one on one for quick books, pricing, etc.

9. What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?

- Promote success stories to encourage others to get involved
- Need to support right from the beginning – may always be subsidized similar to other industries (farmers, fishermen on East coast)
- Need one stop shop to assist with entire process and support once up and running
- However, it is the individual that develops tourism not an association or organization – must find passionate, willing individuals
- By example
- High school presentations
- Everyone offers same product – licensing should monitor quotas
- Hire a Student program – pays \$6/hour operator tops up
- GTC advertised to identify operators – no one came
- Use media – film success stories and use video to promote opportunity; profile individual and take to schools

10. What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?

- ITI, Parks Canada, IRC, Gwich'in, WABD, ABC, Town of YEV
- NWTT not proactive in YEV, works mostly for YZF, will only support if dollar return is high, only told recently they need a password to update their own website content, the list of benefits on the Association website doesn't list anything for YEV
- ITI provides assistance to write business plan (really important first step which will aid greatly in overall success – need a good business plan)
- Existing operators must approve new licenses

11. What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?
12. Who do you think is the market for Aboriginal Tourism? Where do they live? What new or expanded markets could be targeted?
13. Would you be interested in participating in an Aboriginal Tourism Forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?
 - Look at the challenges listed above to develop topics
 - Business owner versus deliver hands on experience
 - Workshop on how to get people involved at all levels
 - April better timing than May
 - Videoconferencing for those that can't attend
 - Help exists – fundamental problem is finding actual people that are interested in delivering and developing

18.6 DEHCHO REGION

Date: February 18, 2010

Location: Fort Simpson

PARTICIPANTS:

Steve Vital	Naha Deh Concerns Team, Nahanni Butte
Darrell Betsaka	Naha Deh Concerns Team
Jonas Antoine	Naha Deh Concerns Team, Dehcho First Nations
George Tsetso	Naha Deh Concerns Team, Dehcho Representative
Vanessa Gerlock	Nahanni National Park Reserve, Fort Simpson
Raquel Michaud	GNWT, ITI, Fort Simpson
Roy Chenard	Tthenago Development Corporation, Nahanni Butte
Lena Marcellais	Tthenago Development Corporation, Nahanni Butte
Fred Teson	Nahanni Butte Dene Band, Nahanni Butte
Trish Duncan	Simpson Air, Fort Simpson
Ria Letcher	North Nahanni Lodge and Dehcho First Nation, Fort Simpson
Julia Capot Blanc	Hamlet of Fort Liard, Fort Liard
Brenda Berrault	Acho Dene Koe First Nation, Fort Liard

KEY ISSUES:

1. What is your definition of aboriginal tourism?
 - Culture
 - Identity
 - Traditional
 - History
 - Language
 - Land area
 - Mind blowing experience
 - Authenticity
 - Local aboriginal
 - Interpretation can be done by non-aboriginals
 - Ownership is a plus, must be some participation (major participation)
2. Does your community support the growth of aboriginal tourism?
 - Unanimous support

3. What do you see as the benefits of Aboriginal Tourism?

- Economic
- Bring pride to the people
- Sustainable
- Showcase culture too the world
- Opportunities
- Can be lucrative
- Focus on winter tourism, more accessibility, northern lights, no bugs, cheaper, more to do
- Sustain Dene culture
- Opportunities for youth
- Physical and mental well-being of people in the tourism industry
- Self-esteem
- Educates about the culture
- Better understanding of fur industry and arts and crafts

4. What do you see as the challenges of Aboriginal Tourism?

- Cost of transportation
- Lack of products, need broader products
- Marketing (big issue)
- Packaging and marketing
- Interpretation, create a vision
- Attractive and interpretative, strategic marketing
- Capacity
- Lots of competition (mines, oil and gas)
- Tourism is seasonal and non-competitive
- Needs to be training – guide training, northern most host, customer service
- Product needs to be grade a quality
- Location is a challenge, cost to fly in
- Need to tap into direct flights from Germany
- Need improvements to highways
- Cost of doing business, insurance, consultation process, interim land agreements
- Lack of implementation of land use plan for access to areas i.e. park
- Need to resolve land use issues
- Equipment, insurance. Licenses, training for boat operator
- Who provides the training
- Flooded marker

- Need a regional assessment
 - Need for business skills
 - Hospitality, people are reserved, cultural differences
 - Language barriers
 - Need print material translated into target languages
 - Hire interpreters
5. Do you see any negative impacts as a result of increased Aboriginal Tourism?
- Not huge issues
 - Environmental damage
 - Spiritual areas
6. What Aboriginal tourism products exist in your community?
- Lots, could be much more if open the park for more tourism
 - Should be marketed as pristine and eco-friendly (green)
 - Pristine
 - Wild
 - Park
 - Snow mobiles
 - Lodge activities
 - Snow shoeing
7. What types of aboriginal tourism products should be developed in your community or in the NWT?
- Use of jet boat to access the park
 - Hiking
 - High demand for hiking in the park
 - Camping in the park
 - More access to shorter excursions now 10 to 14 days
 - Greater variety
 - 1 or 2 day park excursions
 - Rabbit Kettle area access
8. What is needed to support Aboriginal Tourism in your community and the NWT?
- Money
 - Create funding opportunities for development
 - Bridge gap between languages
 - Focus is now on resource development (O&G, mines)
 - Need more balance

- Education and awareness
 - Career trade fairs
 - Promoting regional around the world
 - Demonstrate that tourism can do a lot for you
 - Learn from others, BC, Quebec, Misiqwi Cree
 - Aboriginal people/culture first
 - Sense of urgency
 - Park is expanding, expect to bring more tourism to the region
9. What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?
- See above
10. What agencies and organizations do you know of that are involved or should be involved in aboriginal tourism development?
- Strong voice for regional tourism – Nahanni Ram Tourism Assoc.
 - NWTT only represents YK, don't know the Dehcho region
 - Need linkages between the dc communities
 - Not all operators will be huge
 - Different sized operators, need some micro-operators
 - Communities will collaborate
 - Packaging agency, tour promotion
 - Breakdown of communications between NWTT and operators
 - i. Only select operators invited to meetings
 - ii. Services are generally good
 - iii. Need to represent and know the region better
 - ITI provides funding, promotion and marketing, licensing
 - Local chambers of commerce
 - First Nations need to support
11. What marketing/sales activities does your community/organization currently participate in to support tourism growth in your community or the NWT?
- Need to be at trade shows (targeted)(
 - Need web marketing
 - Combination of regional marketing and individual marketing
 - Whoever does the marketing needs to know the product
 - Dehcho Tourism Association used to market the region
 - NWTT not sellers, just promoters, need bookings on the spot
 - Arts and crafts sales on the spot

- Products are developed, need marketing and bookings

12. Who do you think is the market for Aboriginal Tourism? Where do they live? What new or expanded markets could be targeted?

- Europeans
- Canadians
- Americans

13. Would you be interested in participating in an Aboriginal Tourism Forum in April/May in YK? What topics would you like to see on the agenda? Who (or what areas) would you like to see represented as a presenter?

- Everyone yes
- Focus on regional tourism association/strategy
- BC aboriginal tourism, how they did it

14. Networking – need to coordinate with Yukon Tourism and other agencies

19. APPENDIX E – PROPOSED TIMELINE

Phase	2010	2011		2012		2013		2014		2015	
	Oct-Dec.	Jan-May	Jun-Dec	Jan-May	Jun-Dec	Jan-May	Jun-Dec	Jan-May	Jun-Dec	Jan-May	Jun-Dec
Lead Agency/Organization											
Aboriginal Tourism Strategy											
Industry Development											
Human Resources & Capacity Building											
Product Development											
Marketing and Promotion											

20. APPENDIX F – DRAFT BUDGET

Phase	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	Total Budget
Lead Agency/Organization						\$450,000
Identify a Lead Agency	\$50,000	\$100,000	\$100,000	\$100,000	\$100,000	\$450,000
Aboriginal Tourism Strategy						\$175,000
Host a Strategy Forum	\$100,000					\$100,000
Develop an Aboriginal Tourism Strategy	\$75,000					\$75,000
Industry Development						\$500,000
Market analysis	\$75,000					\$75,000
Aboriginal tourism orientation workshops		\$100,000	\$100,000	\$100,000		\$300,000
Development of Industry Standards & certification		\$100,000				\$100,000
Identify partnerships & support services		\$25,000				\$25,000
Tourism operator Subsidies						
Human Resources & Capacity Building						\$1,200,000
Development of Occupational Standards		\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
Hosting Skills Program		\$100,000	\$100,000	\$100,000	\$100,000	\$400,000
Development & Delivery Aboriginal Tourism Skills		\$100,000	\$100,000	\$100,000	\$100,000	\$400,000
Development & Delivery Develop & Deliver Business Skills Program		\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
Provide on-site Business Development Assistance (in-house)						
Product Development						\$325,000
Develop Product Standards			\$75,000	\$50,000	\$25,000	\$150,000
Develop & deliver a communications plan for product awareness opportunities			\$75,000	\$50,000	\$50,000	\$175,000
Individual business assistance (in-house)						
Marketing and Promotion						\$200,000
Marketing workshops				\$100,000	\$100,000	\$200,000
Total Aboriginal Industry Development	\$300,000	\$625,000	\$650,000	\$700,000	\$575,000	\$2,850,000