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***EVALUATION OF
ABORIGINAL TOURISM TEAM CANADA***

Prepared for

Aboriginal Business Canada
Industry Canada

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Executive Summary

This report presents the results of a review of Aboriginal Tourism Team Canada (ATTC). The review was done by KPMG Consulting on behalf of Aboriginal Business Canada.

PURPOSE

A review of the ATTC was requested by Aboriginal Business Canada (ABC) to determine to what extent ATTC has been successful in influencing and developing tourism policy and programs for the benefit of Aboriginal people.

The review was intended to address key performance issues related to rationale of the ATTC initiative and impacts of the initiative. Specific questions related to these issues are addressed by the review report.

APPROACH

The approach for the study included the following tasks:

- a review of relevant documents and databases
- a survey of Aboriginal tourism sector organizations
- interviews with ATTC Board members
- interviews with Regional Aboriginal Tourism Associations (RATAs)
- interviews with Government partners
- a literature review.

The conclusions and recommendations from the study are summarized below.

CONCLUSIONS AND RECOMMENDATIONS

Rationale and Need for ATTC

- The review confirms the need for an ATTC-like organization.
- There is sufficient evidence from market studies that Aboriginal tourism in Canada holds strong potential for growth, and is a source of employment and economic development for Aboriginal communities throughout Canada.

- Aboriginal tourism organizations from all tourism sectors suggest that an Ottawa-presence, and a national organization to represent Aboriginal Tourism in Canada is required on a continuing basis, to promote and help develop the Aboriginal tourism product and to provide a voice representing the interests of this industry in Ottawa.
- It is also suggested that a coordinated, cohesive federal (interdepartmental) policy for Aboriginal tourism be introduced. In addition to Industry Canada, several departments have an interest and are partners in the work of ATTC, including Canadian Tourism Commission, Canadian Heritage, Indian and Northern Affairs, and Parks Canada. However, there is not a clear consensus on the roles and contributions required from different departments, and how these should be coordinated under one strategic framework that consolidates requirements of the initiative.
- **Recommendation [1] to conduct a strategic review**—*There is a need for a strategic review that consolidates the rationale for an ATTC-like organization, defines more clearly the roles and commitments of different participants and partners in the initiative (including federal government departments and RATAs), provides for more consistent and diversified funding sources, and scopes out the program in a manner consistent with the opportunities and challenges of developing the Aboriginal tourist industry in Canada.*

Role of RATAs

- The role of Regional Aboriginal Tourism Associations (RATAs), as a network of associations serving regional and local needs of the Aboriginal tourism industry across Canada, is confirmed by this review study. This is seen particularly in the context of a need to further develop RATAs in each province, to address grassroots issues of the industry. ATTC, on the other hand, is seen as more of an umbrella organization – i.e., the “glue” that supports and keeps the network of associations together.
- RATAs are at different stages of development in different regions of Canada. This partly depends on how long they have been in business, and partly on their relationships to local and regional government organizations and private sector participants. It also depends on their respective financial support base and range of activities.
- **Recommendation [2] to continue to support the development and growth of RATAs**—*There is a need to continue to develop the RATA organizations, to help them grow and to strengthen their capacity to serve regional and local Aboriginal tourism interests.*

Leadership

- Generally, partners of ATTC who were interviewed for this study have given high marks for the progress made by ATTC in establishing a national presence, and in promoting Aboriginal tourism in various networking venues, media and interest groups.
- There is also a general notion that the administrative requirement of setting up an ATTC organization in Ottawa has substantially succeeded, and that ATTC's presence and profile has increased incrementally over the past three years.
- A strong base has been established to build on, but more effort is required to broaden the reach and effectiveness of the organization, and to address critical strategic issues related to promoting and developing Aboriginal tourism in Canada.

Funding

- There is a consensus that ATTC cannot realistically be expected to be a financially "self-sustaining" organization, at least in the foreseeable future (i.e., over the next three years).
- This does not preclude contemplating undertaking cost-recovery activities such as charging membership dues, conference fees, or payments for information services. Some corporate and private sponsorships and in-kind contributions are potentially sources of support, but at this point this represents a funding option that has not been fully assessed/explored by the organization.
- **Recommendation [3] to develop an interdepartmental strategic framework—**
There is a consensus among ATTC Board members, ATTC staff, RATA organizations and government partners and participants in the ATTC-related initiatives, that core funding for ATTC needs to become more diversified and consistent with a broader strategic framework that encompasses several federal interdepartmental mandates.

Reach

- Survey results show that ATTC and the RATAs have achieved some success in reaching out to the Aboriginal tourism community (the industry sector operators).
- Of 118 Aboriginal tourism organizations interviewed, 16 percent said that they were "familiar" with ATTC, 25 percent said they were "somewhat familiar" and 59 percent said they were "not familiar". While this appears to be a low percentage of familiarity, in fact it is a very good result when one considers that ATTC is a

relatively new organization with limited resources and staff, and a national mandate working out of Ottawa (i.e., not at the regional or tourist operator's jurisdiction).

- Similarly, RATAs have also been moderately successful in reaching out to Aboriginal tourism organizations. Out of 118 Aboriginal tourism organizations interviewed, 27 percent said they were “familiar” with their local (i.e., regional) RATA, 16 percent said they were “somewhat familiar”, and 57 percent said they were “not familiar”.
- Of those who were “familiar” or “somewhat familiar” with ATTC and/or RATA, 22 percent were able to identify directly with some specific ATTC and/or RATA project-related activity.
- Of those who could identify with some specific ATTC and/or RATA project-related activity, 40 percent said that they thought the project(s) had a definite impact on improving awareness of, and/or helping promote/market tourism in their respective regions.
- More than half of those organizations that said they were “familiar” or “somewhat familiar” with ATTC felt that more should be done by this organization to promote Aboriginal tourism in Canada.
- Generally, about 45 percent of those “familiar” or “somewhat familiar” felt that ATTC could do more market research to identify business opportunities; 40 percent felt that ATTC should do more trade shows/missions; 52 percent felt that ATTC should do more promotional activities and networking events; 56 percent felt that ATTC should provide more educational materials and opportunities.
- Several (about 55 percent) of those organizations that had not heard of ATTC, or the relevant local RATA, said they would like to hear more about them and agreed in principal that such organizations were needed.
- None of the organizations interviewed would attribute any of their personal successes in the industry to any ATTC or RATA related activities or services. However, encouragingly, about 20 percent suggested that at least “some success” of their organizations could be attributed to either an ATTC or RATA related activity or service.

Project Activities

- A large majority of ATTC Board members, RATAs, and government partners interviewed indicated that ATTC's project activities have been adequate over the past three years. The projects undertaken have been relevant and contributed in varying ways to the challenge of understanding the industry and its needs, in promoting Aboriginal tourism, and in supporting the development of industry capacity and products.

- RATAs in particular strongly endorse the ATTC project activities and related information products, since RATAs (as well as ATTC itself) consistently receive requests for the type of information that ATTC has been producing over the past three years. This includes newsletters, guides to doing business and brochures, checklists, media articles, and other similar information products and referrals.
- **Recommendation [4] to widen the dissemination of project results—***Notwithstanding the adequacy of ATTC project activities, there is a consensus that the dissemination of results of projects could be more widespread, since there appears to be a strong appetite for this information among the industry partners and tourism organizations.*

Scope of the ATTC Initiative

- The scope of ATTC, as it currently stands, may not be sufficiently broad enough to address the full range of potential challenges involved, to develop Aboriginal tourism in Canada to its full capacity.
- **Recommendation [5] to consider situating ATTC within a broader federal context—***The “strategic review” suggested above, should consider the issue of scoping out ATTC against a broader federal mandate, and interdepartmental strategic framework.*

RATA Perspectives

- The issue of RATAs in the Atlantic provinces has not been sufficiently resolved. There is a need to develop separate RATAs within each province—since the different communities in the Atlantic represent distinct Aboriginal entities.¹
- In recognition that Industry Canada has a specific mandate within the federal government, RATAs are consistent in their view that the Aboriginal tourism issue is an interdepartmental matter, and that the Industry Canada mandate only partially addresses the full requirements of this industry.
- All RATAs suggested that ATTC funding sources should be more diversified, but all were appreciative that Industry Canada continues to contribute to the extent that it has over the past three years.

¹ Since the completion of this review study, Prince Edward Island has begun a process to develop articles of association for a RATA in that province.

- **Recommendation [6] to diversify funding sources for ATTC**—*All RATAs consider that there is a strong need for other government participants in ATTC to contribute to core funding requirements, as well as project-related funding.*

The Perspective of Aboriginal Tourism Organizations

- While a majority of the tourism organizations interviewed for this study were not familiar with ATTC or respective regional associations for Aboriginal tourism, they nonetheless consider it to be essential that such organizations have the support of government and of the industry itself.
- They also suggested that they would like to see a stronger presence in providing information services about Aboriginal tourism, and that promotion of their products be provided a higher profile by ATTC in Ottawa—and of course in the various market areas where their tourists come from, particularly the U.S., certain parts of Europe and Asia-Pacific Rim, in addition to Canada.

Reporting and Accountability

- Due diligence requires appropriate reporting for accountability purposes in response to requirements of funding sources.
- ATTC quarterly reports provided to ABC are detailed and sufficient for accountability purposes, but evaluation indicators and performance measures that are tracked against strategic or operational goals of ATTC are required, in a handy way for ABC to monitor and assess progress on a routine basis.
- As the main provider of core funding to ATTC, this is a minimum requirement by ABC to address due diligence and evaluation requirements that are common to all government departments and agencies.
- There is a need for interaction between ABC and ATTC on this matter to discuss and agree on a set of relevant indicators for this purpose. Pertinent indicators and performance measures are suggested in the report, including qualitative and quantitative measurements related to the key strategic directions of ATTC.
- These requirements are intended to determine to what extent ATTC has achieved its objectives, at least on an annual basis, and has completed its prescribed statement of work with ABC while realizing appropriate value for resources contributed by ABC.
- **Recommendation [7] to develop and track performance measurements**—*ATTC needs to develop and track performance measurements, in consultation with its*

government funding sources, to ensure a results-based accountability system is in place that is consistent with federal government guidelines and requirements.

Operational Effectiveness

- Operational effectiveness generally can only be assessed against expectations, stated goals in operational plans, and level of effort required and realized by the organization.
- In this respect, ATTC with only three full-time staff members is considered to be productive, especially over the past three years, by a majority of the ATTC Board members, government partners, and RATA representatives who were interviewed.
- However, the feedback is that ATTC's role is clear, that it needs to do more of what it is currently doing to have a greater impact and be more effective. It is also recognized, however, that to achieve this requires additional resources at ATTC.
- **Recommendation [8] to increase staffing support**—*Notwithstanding ATTC's current level of effort and productivity, a broadening of the scope of activities with additional staffing support is needed.*

ATTC Board of Directors

- Board members participate on a voluntary basis, and their pro-active contributions help broaden the reach and effectiveness of ATTC. However, Board members are expected to (and do) contribute to strategic directions and challenges in responding to Aboriginal tourism opportunities.
- Operational issues and long-term funding challenges need to be resolved so that Board members could turn more of their attention to fundamental challenges and requirements of developing the Aboriginal tourism industry throughout Canada.

I. Background

This report presents the results of a review of Aboriginal Tourism Team Canada (ATTC). The review was done by KPMG Consulting for Aboriginal Business Canada, Industry Canada.

1.1 Purpose

The report describes the ATTC initiative, its activities and policy context, and presents findings and recommendations on implementation and related questions. The purpose of the review was to address questions related to the following areas of investigation:

- rationale and need for ATTC
- initiative design and service delivery
- results of the initiative
- client reach and impacts.

The review was intended to provide Industry Canada and Aboriginal Business Canada with feedback on the ATTC initiative with respect to these issue areas—to determine to what extent ATTC has been successful in influencing and developing tourism policy and programs for the benefit of Aboriginal people, and to determine to what extent ATTC has achieved its objectives to date and has completed its prescribed statement of work with ABC, while realizing appropriate value for resources contributed by ABC.

The review was also intended to assess the operational effectiveness of ATTC, and to identify appropriate performance measures for monitoring and reporting on ongoing performance of ATTC.

1.2 The ATTC Initiative

In July 1996, representatives of the Aboriginal tourism industry and key government departments met to explore the concept of developing Aboriginal Tourism Team Canada. The ATTC initiative arose in response to expressed industry needs to address a variety of concerns and aspirations. The concept provides a vehicle for government and business to work as a team in implementing a collective vision for Aboriginal tourism and achieving common goals.

1.2.1 Definition of “Aboriginal Tourism”

The operating definition of Aboriginal tourism for ATTC is any tourism business that is owned or managed by Indians,² Inuit or Métis people. It comprises the full spectrum of tourism products and services, be it traditional or contemporary. This includes: accommodation, food and beverages, transportation, attractions, travel trade, events and conferences, adventure tourism, recreation, and arts and crafts.

1.2.2 Vision, Mission and Activity Areas of ATTC

The vision of ATTC is to represent Aboriginal people as world leaders in tourism in harmony with their culture. ATTC is a partnership of business and government whose mission is to influence and develop tourism policies and programs to benefit Aboriginal people in Canada.

Guided by its values and vision, ATTC identified the following key activity areas to achieve its mission:

- **Industry development**—To support the new development and expansion of Aboriginal tourism products that meet or exceed market standards.
- **Community awareness and capacity development**—To increase awareness of Aboriginal tourism as an economic development opportunity through increased community level initiatives. To increase the capabilities of regional associations so they can better assist industry development and provide better services to existing businesses.
- **Marketing and partnership building**—Assist industry growth and create greater awareness of and therefore increase market share for Aboriginal products and services within both domestic and international tourism markets.
- **Human resources development**—To support skill development initiatives in order to increase the participation of Aboriginal people in the tourism industry. To support Aboriginal youth.
- **Communications**—To ensure effective and consistent communication with stakeholders. To advocate the key directions of ATTC.

1.2.3 Participation

Participation in ATTC is open to representatives from the following organizations: Aboriginal tourism/travel businesses in the hospitality, transportation, culture/heritage, arts and crafts, and outdoor/adventure sectors. Participation is also open to representatives from the various Regional Aboriginal Tourism Associations (RATAs) across Canada, and to government partners—including Canadian Tourism Commission, Indian and Northern

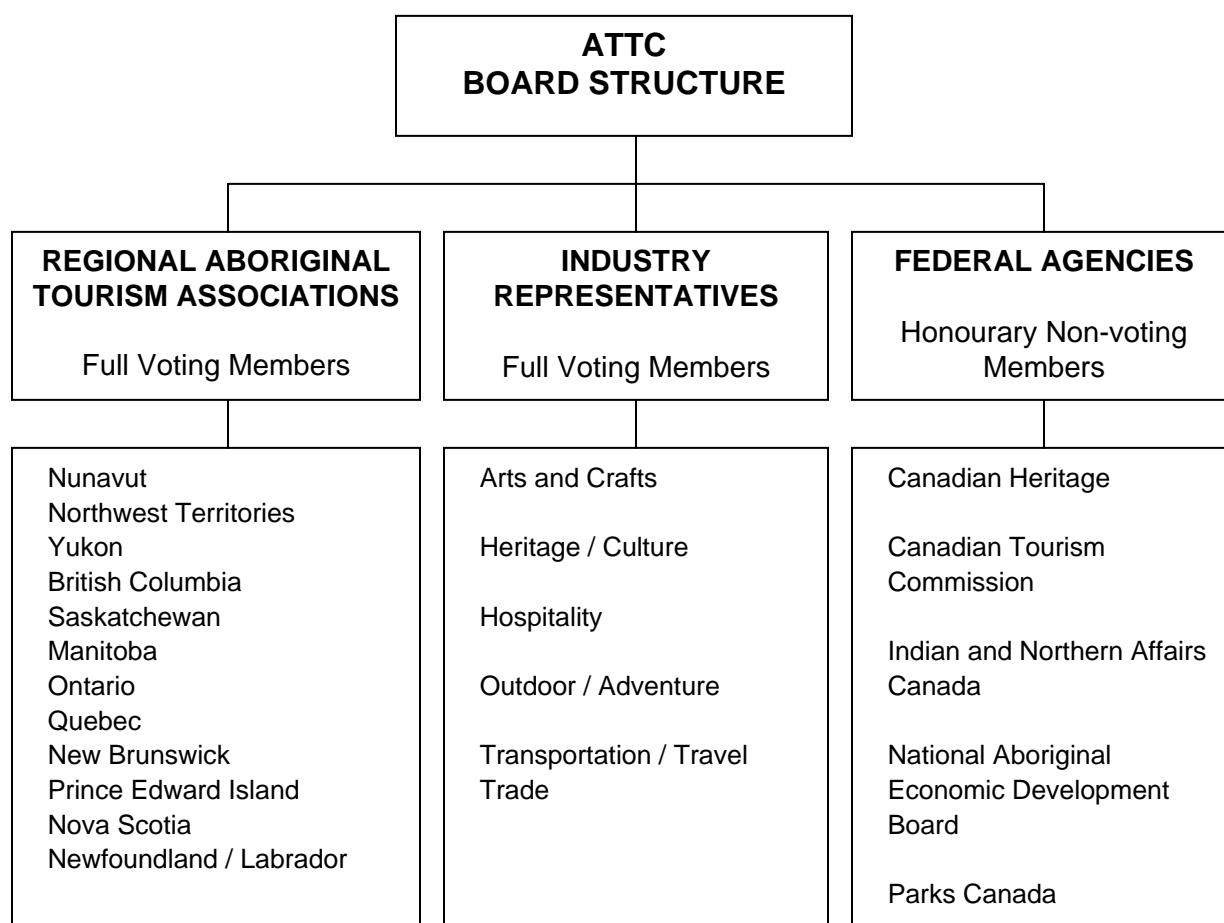
² The use of the word “Indian”, rather than “First Nations”, was first proposed by ATTC so as to ensure off-reserve and non-status Indians were included.

Affairs Canada, Canadian Heritage, National Aboriginal Economic Development Board, and Parks Canada.

1.2.4 Board of Directors

The Board of Directors of ATTC is comprised of representatives from Aboriginal regional associations, Aboriginal tourism industry sectors across Canada, and government agencies. Exhibit 1.1 shows the geographic coverage and organizational/sectoral representation. A good mix of participants is represented on the Board, and this contributes to achieving a good basis for setting appropriate goals and strategic directions for ATTC.

Exhibit 1.1: ATTC Board of Directors Structure and Representation



1.2.5 Organization and Finances

The ATTC is comprised of a total staff of three persons, including an Executive Director, a Projects Manager, and an Administration Officer. The core budget for ATTC is in the vicinity of \$500 thousand per year. This covers salaries, travel, office rental, equipment, Board expenses, other operating expenses, general business development and advocacy projects, and other expenses related to training, developing a national strategy and hosting a national forum and conferences. Other specific project funding is over and above core

funding, and varies from year to year depending on agency contributors and projects proposed. Exhibit 1.2 provides a summary of the official ATTC revenues and expenses statements for 2001 and 2000 (according to McIntyre and McLarty LLP, chartered accountants, October 25, 2001).³ Aboriginal Business Canada contributes core funding for operations of ATTC.

Core funding from ABC for the year ended August 31, 2002 was also similar at \$499 thousand, and core funding from ABC for the year ending August 31, 2003 has been renewed at a similar level. Additional details about funding and funding sources are provided in Section 1.4.

Exhibit 1.2: Summary Statement of ATTC Revenues and Expenses

	YEAR ENDED AUGUST 31, 2001	YEAR ENDED AUGUST 31, 2000
REVENUES		
Aboriginal Business Canada	\$ 576,364	\$ 508,324
Canadian Tourism Commission	39,150	5,000
Indian and Northern Affairs Canada	--	7,500
Parks Canada	3,300	--
Saskatchewan Indian Gaming Authority	--	1,070
Tourism Industry Association Canada		
Conference registrations	1,500	--
Other	20,437	6,471
	1,883	149
	<u>642,634</u>	<u>528,514</u>
EXPENSES		
Accord	\$ 494,947	\$ 428,760
Conference	48,956	43,299
European Market Research	18,596	25,658
Travel Activity and Motivational Study	22,873	--
Other	--	6,201
	<u>\$ 585,372</u>	<u>\$ 503,918</u>
EXCESS OF REVENUES	\$ 57,262	\$ 24,596

³ ATTC Annual Report, 2000-2001.

1.2.6 Activities and Projects

Phases of development of ATTC—Aboriginal Business Canada has been supporting the ATTC since its foundation in 1997. The first three years of ATTC operations had focused on securing funding sources and a consistent cash flow for the organization, on staffing, and on identifying the organization's strategic directions and key activity areas. During the second phase, primarily since 1999-2000 to the present, ATTC has been building a national presence under new management and, with the help of its partners and associates, has focused on implementation and project development, as well as on nurturing relationships with key stakeholders, contributing to the success and development of RATAs, and generally helping promote the continued growth of Aboriginal tourism in Canada.

Activities—ATTC keeps a national inventory of active Aboriginal tourism businesses. It supports existing Regional Aboriginal Tourism Associations (RATAs) and the creation of new ones. Exhibit 1.3 provides a list of the current RATAs in operation across Canada. ATTC is currently on the board of the Canadian Tourism Human Resource Council (CTHRC) and a member of the Tourism Industry Association of Canada (TIAC).

ATTC produces a quarterly newsletter distributed to Aboriginal tourism organizations across Canada, and maintains a website with relevant business, marketing and financial links for aboriginal tourism entrepreneurs. ATTC also organizes an annual national Aboriginal tourism forum, encouraging stakeholders in Aboriginal tourism to meet, learn and share their expertise.

Exhibit 1.3: Regional Aboriginal Tourism Associations

LIST OF RATAs
Aboriginal Tourism Association of British Columbia (AtBC)
Niitsitapi Tourism Society of Alberta
Aboriginal Tourism Association of Saskatchewan Inc. (ATASI)
Manitoba Aboriginal Tourism Association (MATA)
Northern Ontario Native Tourism Association (NONTA)
Aboriginal Tourism Association of Southern Ontario (ATASO)
Quebec Aboriginal Tourism Corporation (S.T.A.Q.)
Nunavut Tourism
Yukon First Nations Tourism Association (YFNATA)
Northwest Territories Arctic Tourism

Note: Since the time of completing this review study, Saskatchewan launched its own RATA, and Prince Edward Island began a process for drawing up articles of association for a RATA in that province.

Projects—Exhibit 1.4 provides a partial list of projects and activities undertaken by ATTC since 1997. This list is only a partial list intended to be representatives of the different kinds of work ATTC has been involved in since its inception.

As can be seen from Exhibit 1.4, ATTC projects and activities have included marketing, networking, advocacy, community awareness, communication and human resources development opportunities and events—all well within the context of its mandate and its “key directions”.

Exhibit 1.4: Partial List of Projects ⁴

PROJECT / ACTIVITY	YEAR
ATTC Strategy Development	1997
Advertising – Ontario Tour Planner	1998
Salon de la rondonee et des sports nature	1998
Promote Aboriginal Tourism at Trans Globe Outdoor Event in Germany	1998
Coordination—National Aboriginal Tourism Strategy	1998
Aboriginal Tourism Trade Mission—Germany	1998
Aboriginal Tourism Identity Project Design (Air Canada Plane Project)	1998
Aboriginal Delegation at World Travel Market in London, England	1998
Planning and Professional Development Workshop	1999
Participation in International Tourism Bourse (ITB)—Germany	1999
ATTC National Forum in Halifax	1999
Rendezvous Canada Calgary	2000
Aboriginal Tourism—Business Planning Guide (Checklist for Success)	2000
Aboriginal Cultural Tourism: Checklist for Success	2000
National Aboriginal Tourism Conference and Youth Forum in Saskatoon	2000
Development of Aboriginal Tourism Database	2000
Market Research in Europe—in Partnership with CTC	2000
Canada and U.S. Market Research Project	2001
Aboriginal Tourism Identity Project Launch and “Painting the Plane”	2001
ATTC Annual Forum in Brantford, Ontario	2001
Aboriginal Tourism Product Data Set—TAMS Research	2001
National Study on the State of the Aboriginal Tourism Industry	2002
Rendezvous Canada, Halifax	2002
National Aboriginal Tourism Conference	2002
National Poster Campaign Project	2002

⁴ This list is partial but representative of the kinds of projects ATTC has been involved with since its inception in 1997.

1.3 ABC Policy for ATTC and RATAs

As a part of Industry Canada, Aboriginal Business Canada is dedicated to working with Aboriginal entrepreneurs to promote the development, competitiveness and success of Aboriginal business in Canadian and world markets. As such, ABC provides national level funding for aboriginal tourism associations primarily directed to the Aboriginal Tourism Team Canada secretariat with funding available to them in three areas:

- Operating expenses—100 percent of operating expenses including salaries, office expenses, travel and Board expenses to a maximum of \$250,000 per year.
- General business development and advocacy projects—75 percent of eligible costs related to training development, product accreditation, development of a national strategy and national forums and conferences to a maximum of \$250,000.
- Marketing projects—50 percent of project costs as related to national marketing initiatives and participation at trade shows.

ABC also provides provincial or regional level funding for provincial or regional Aboriginal tourism associations. This funding is available through the respective regional ABC offices and budgets. It is expected that each province and territory will develop their own regional Aboriginal tourism association(s).

Funding for RATAs is available for a variety of projects:

- **RATA development**—Maximum of \$50,000 one time funding to support the initial study or regional conference for the development of a regional association. Conditions of funding are: be an industry driven initiative with support of local Aboriginal tourism operators; be province/region wide in scope and represent all Aboriginal heritage groups.
- **RATA ongoing support**—Maximum of \$50,000 per year for operating expenses of an association based on meeting the following conditions: have matching financial support from another agency or provincial government; continue to be industry driven, province/region wide and represent all heritage groups.
- **RATA projects**—75 percent of costs for General Business Development and Advocacy projects which leverage other funds from industry and other partners as provincial governments and regional agencies. 50-75 percent for marketing projects on a regional level or participation in a national initiative.

1.4 Funding and Funding Sources

Exhibit 1.5, provided by ATTC, shows a history of funding for Aboriginal Tourism Team Canada beginning with the 1997-1998 fiscal year. This tabulation provides information up to

January 2002. More recently, ABC has approved funding for the current fiscal year, ending August 2003, at a level similar to ABC contributions in previous years.

ABC has been the most significant contributor to date to ATTC both for operational and project support, with a total of \$2.454 million (to January, 2002). ABC has been the only provider of operational support.

The Canadian Tourism Commission (CTC) has been ATTC's most consistent project partner with over \$330,000 in project dollars to date. CTC has also agreed to contribute \$100,000 for ATTC operations in fiscal year 2002-2003.

Indian and Northern Affairs (INAC) has to date contributed over \$120,000. Parks Canada and Canadian Heritage have only begun funding partnerships with ATTC last fiscal year and together have increased from \$5,200 last year to \$36,300 in 2001-2002.

Contributions from other partners have not been very significant, although the Canadian Tourism Human Resource Council (CTHRC) put up \$32,000 for the *Tourism Business Planning: Checklist* project. Also, Air Canada accounted for \$160,000 of partner support for the Aboriginal Tourism Identity Project (ATIP).

Exhibit 1.5: Aboriginal Tourism Team Canada Funding History⁵

Partner	Fiscal Year	Core Funding	Project Funding		Total by Partner & Fiscal Year
			Cash	In-kind	
Aboriginal Business Canada	1997-98	\$61,236			\$61,236
	1998-99	\$461,332	\$314,765		\$776,097
	1999-00	\$459,494	\$53,627		\$513,121
	2000-01	\$487,885	\$75,355		\$563,240
	2001-02	\$499,000	\$41,400		\$540,400
	TOTAL	\$1,968,947	\$485,147		\$2,454,094
Canadian Tourism Commission	1998-99	0	\$132,000	\$0	\$132,000
	1999-00	0	\$104,650	\$30,000	\$134,650
	2000-01	\$7,300	\$31,850	\$0	\$39,150
	2001-02	0	\$25,000	\$0	\$25,000
	TOTAL	\$7,300	\$293,500	\$30,000	\$330,800
Parks & Canadian Heritage	1998-99	\$0	\$0	\$0	\$0
	1999-00	\$0	\$0	\$0	\$0
	2000-01	\$0	\$5,200	\$0	\$5,200
	2001-02	\$0	\$36,300	\$0	\$36,300
	TOTAL	\$0	\$41,500	\$0	\$41,500
Indian & Northern Affairs	1998-99	\$0	\$54,463	\$0	\$54,463
	1999-00	\$0	\$7,500	\$0	\$7,500
	2000-01	\$0	\$0	\$0	\$0
	2001-02	\$0	\$58,800	\$0	\$58,800
	TOTAL	\$0	\$120,763	\$0	\$120,763
Others	1998-99	\$0	\$0	\$0	\$0
	1999-00	\$0	\$33,000	\$20,000	\$53,000
	2000-01	\$0	\$163,820	\$0	\$163,820
	2001-02	\$0	\$0	\$0	\$0
	TOTAL	\$0	\$196,820	\$20,000	\$216,820
TOTAL		\$1,976,247	\$1,137,730	\$50,000	\$3,163,977

⁵ In 1999, ATTC changed its fiscal year from April 1 – March 31 to September 1 – August 31. Thus, figures in 1998-99 are for a 17 month period. For 2001-02, figures are derived from actual and agreed upon dollars as at January 18, 2002.

Sources: Prepared by ATTC based on audits for each fiscal year, as well as from internal financial records because partner dollars were not adequately captured before 1999-2000.

II. Approach

The approach of the review was tailored to address particular issues identified for the study. The review focused mainly on consultations with key informants and stakeholders with interests in Aboriginal tourism in Canada, and with ATTC partners and associates involved in activities to help the growth and development of Aboriginal tourism.

2.1 Issues

The issues addressed in this study are generally related to the rationale for maintaining an organization such as ATTC and the results expected and achieved. Any government initiative should have a context, a *rationale* for being introduced and maintained. The initiative's design and delivery mechanisms should provide a basis for causal linkages between related activities and results—and the ultimate achievement of objectives.

The issues addressed were designed around the following key issue areas:

- **Rationale and need for ATTC:** This involves understanding the challenges faced in growth and development of Aboriginal tourism in Canada, the need for government support, and the relevance and context of the ATTC initiative within ABC/Industry Canada's mandate and expectations.
- **Initiative design and service delivery:** This involves examining the consistency and relevance of the overall goals of the initiative, the operational effectiveness of the organization and the delivery of ATTC services.
- **Results of the initiative:** This involves reviewing the performance and achievements of ATTC.
- **Client reach and impacts:** This involves identifying the extent to which ATTC has developed a national presence, and the kind of impact it has achieved in supporting the development and growth of Aboriginal tourism.

Sections III and IV of this report present the main findings regarding these issue areas.

2.2 Methodology

The analysis and results of the study are based on a series of consultations with ATTC Board members, RATA representatives, ATTC staff and management, officials of federal government departments, and key informants and stakeholders involved in the Aboriginal tourism industry.

In addition, a survey was conducted of Aboriginal tourism operators across Canada, and relevant documents and industry references were reviewed. Also examined were online and offline resources and information materials of organizations involved in Aboriginal tourism.⁶

Exhibit 2.1: Tasks of the Study

A review of relevant documents and databases
A survey of Aboriginal tourism sector organizations
Interviews with ATTC Board members
Interviews with Regional Aboriginal Tourism Associations (RATAs)
Interviews with federal government partners
A literature review

Overview of Interviews:

- Forty-one interviews were carried out with stakeholders and key informants concerned with Aboriginal tourism in Canada, and ATTC operations. The interviews by group of interviewee are summarized as follows:

Exhibit 2.2: Interviews

Interviewee Group	Number of Interviews
Aboriginal Business Canada – regional and HQ staff	6
ATTC staff	3
RATA representatives	9
ATTC Board – voting members	12
Aboriginal industry sector representatives	6
Other federal government partners	5
Total interviews	41

- In total, ten interviews were done in person, and the remainder were done by telephone.

⁶ Appendix A provides a list of references and documents reviewed and Appendix B provides a list of individuals interviewed.

- A list of individuals interviewed is provided in Appendix B and a list of the interview questions is in Appendix C.
- The interview questions addressed strategic and operational challenges related to Aboriginal tourism, ATTC rationale and delivery of services, and expectations of results and impacts. Questions about the commitment and need for government support to an ATTC-like organization, and about approaches and improvements, were also discussed with interviewees.

Overview of survey of Aboriginal tourism operators:

- Out of an attempted 360 telephone interviews, 118 survey respondents were reached, achieving an overall survey response rate of 33 percent. The designated target for the study was 100 responses from Aboriginal tourism operators across the various industry sectors and regions of Canada. The survey questionnaire is provided in Appendix D.
- Provincial and regional representation in the survey is as follows:
 - Ontario, 26 responses (22 % of sample);
 - Quebec, 20 responses (16.9 % of sample);
 - Alberta, 16 responses (13.6 % of sample);
 - British Columbia, 13 responses (11 % of sample);
 - Manitoba, 8 responses (6.8 % of sample);
 - Saskatchewan, 5 responses (4.2 % of sample);
 - Atlantic provinces, 8 responses (6.8 % of sample);
 - Yukon, 8 responses (6.8 % of sample);
 - Nunavut, 8 responses (6.8 % of sample);
 - Northwest Territories, 6 responses (5.1 % of sample);
- Industry sector representation in the survey is as follows (percentages do not add up to a total of 100 percent, because several individual responses represent two or more tourism sectors):
 - Accommodation, 13 responses (11 % of sample);
 - Food and beverages, 20 responses (17 % of sample);
 - Outdoor/adventure, 21 responses (18 % of sample);
 - Attractions, 17 responses (14 % of sample);
 - Transportation, 6 responses (5 % of sample);
 - Tourism services, 51 responses (43 % of sample);
 - Event tourism, 16 responses (14 % of sample);

- Travel trade, 11 responses (9 % of sample).
- The sample frame for the study was derived from the ATTC database on Aboriginal tourism operators. The provincial/regional and industry sector representations shown above are reflective of the distribution of operators in the ATTC database. As the figures above show, the sample is reasonably representative across geographic and industry sector categories.
- All respondents are Aboriginal-owned and Aboriginal-managed businesses.
- The survey was conducted during the months of June, July and August 2002.

2.3 Limits of the Methodology

As a review, this study does not tackle issues related to the overall economic or specific industry sector impacts of ATTC on Aboriginal tourism. It is difficult to isolate and attribute specific impacts that ATTC has achieved on individual communities and/or regions, notwithstanding (and because of) the limited size and scope of ATTC operations and staff. The evidence of impacts, such as it is, though revealing, is mostly anecdotal and essentially non-quantitative in nature.

From the consultations conducted with key informants, it is generally accepted that overall the expected ultimate results and impacts of the initiative have not yet fully matured to yield measurable economic returns. Most respondents would agree that ATTC is a “work in progress”. For example, there is no evidence of quantifiable returns on investments, or value for money in the form of new revenues to the Aboriginal tourism industry, which have specifically been attributed to ATTC.

Another limitation is in the scope of the consultation process. While key informants and stakeholders in Aboriginal tourism have been adequately surveyed and consulted, the Aboriginal tourism industry in general in Canada is potentially very broad, with numerous stakeholders and participants in many public and private organizations and industry sectors, at different levels of geographic and political representation. Although some key associations, government representatives and Aboriginal organizations were consulted about the specific review issues of concern to ABC, the sample is not comprehensively representative of all Aboriginal stakeholders and interests across Canada.

III. Rationale and Need for ATTC

The findings of the review on the issues related to rationale and need for ATTC initiatives are contained in this section of the report. The results regarding these issues, from the consultations undertaken, from the survey, and from other background research, are presented in the following sections.

3.1 Industry Profile

Aboriginal tourism is any tourism business that is owned or managed by Aboriginal people. It covers the full spectrum of tourism products and services, be it traditional or contemporary, in all sectors of the industry. These include accommodation, food and beverages, transportation, attractions, travel trade, events and conferences, adventure tourism, recreation, and arts and crafts.

Size of industry—It has been estimated (KPMG report⁷) that Aboriginal tourism is a \$270 to \$300 million industry, in gross revenues, comprised of 1200-1500 small businesses and providing up to 16,000 jobs. It is also estimated that there is a lot of room for growth. Based on national tourism indicators of Statistics Canada and the Canadian Tourism Commission, ATTC estimates that Aboriginal tourism represents 0.5 percent of Canadian tourism as a whole (an industry sector exceeding well-over \$50 billion a year in revenues).

Potential—The potential for Aboriginal tourism, if Aboriginal people in Canada were to share in the tourism industry in proportion to their population, could be a \$1.6 billion industry employing 30,000 to 40,000 people.

Unfortunately, these industry profile data have not been tracked or updated in more recent studies. Nevertheless, they are clearly indicative of what the industry's potential is, and they provide a basis from which to argue for growth strategies focused on realizing the full potential of the industry.⁸

Aboriginal tourism product—In 1997, the Conference Board of Canada undertook an Aboriginal Tourism Products Identification Project. The purpose of this project was to assist in marketing efforts through the identification of export ready products and to provide information for more informed decision-making by Aboriginal tourism interests.

The project identified specific tourism sectors, broken down by provincial and territorial locations and determined the gross revenue level of each business.

⁷ *National Aboriginal Strategic Analysis*, prepared by KPMG for National Aboriginal Economic Development Board (NAEDB), Ottawa, 1997.

⁸ It is anticipated that a current study underway by ATTC (*National Study of the Aboriginal Tourism Industry in Canada*) will provide more up-to-date information about the industry and its potential.

Exhibit 3.1 illustrates the distributions of these data. Naturally, Ontario, Quebec and British Columbia show the largest percentage of Aboriginal tourism businesses. The top three sectors in the Aboriginal tourism industry are accommodation, events and conferences, and tourism services, which account for 55 percent of all tourism businesses identified by the Conference Board.

The large proportion of businesses that are classified as small (less than \$100K) is approximately 54 percent. This suggests that the industry as a whole is under developed. These industries are deemed to be the youngest and most vulnerable both to competition from within and outside of the Aboriginal tourism industry.

Exhibit 3.1: Aboriginal Tourism Product Distribution

Primary Business Category	Percent of Businesses	Location: Province or Territory	Percent of Businesses	Gross Revenue of Business	Percent of Businesses
Accommodation	20%	Ontario	26%	Under \$50K	41%
Events and Conferences	18%	Quebec	16%	\$50K - \$100K	13%
Tourism Services	17%	British Columbia	16%	\$100K - \$300K	18%
Attractions	15%	Manitoba	12%	\$300K - \$500K	7%
Adventure Tourism	12%	Saskatchewan	11%	\$500K - \$750K	8%
Food and Beverage	7%	Nunavut	8%	\$750K - \$1M	5%
Travel Trade	6%	Northwest Territories	4%	\$1M plus	8%
Transportation	4%	Alberta	3%		
Other	1%	Yukon	2%		
		Atlantic	2%		
TOTAL	100%	TOTAL	100%	TOTAL	100%

Based on current estimates of tourism in Canada, interest in outdoor or cultural/heritage (*a.k.a.*, Aboriginal) products is a “tremendous untapped potential...”.⁹ In the total outdoor/culture market segment, for example, Canadians represent 74 percent of overnight visits, Americans account for 20 percent and all other countries account for just over 6 percent. The extent to which these tourists have or will utilize Aboriginal tourism products will depend on the types of products and services offered by Aboriginal communities and

⁹ Tourism Attitude and Motivation survey and study (TAMS)—see Appendix A for reference.

how effectively the special needs and interests of target outdoor and heritage markets are met.

Conclusion—These data suggest that Aboriginal tourism is under developed in terms of its gross annual revenue and employment in comparison to the mainstream Canadian tourism industry. However, with appropriate support mechanisms in place, systematic growth can take place to realize the full potential of the industry for future prosperity.

3.2 Rationale and Need Issues

3.2.1 Need for ATTC

Feedback from RATAs, ATTC Board Members and Industry Representatives

- ATTC is needed to help provide “the glue” that keeps the diverse and dispersed Aboriginal tourism industry together. ATTC tries to reach out to various communities across Canada, by scheduling events and meetings in different locales, and to invite industry and other representatives to attend and network.
- There is a need for ATTC to more effectively engage other departments of government to support the development of Aboriginal tourism. The mandate of ABC (Industry Canada) does not embrace all the socio-economic facets and requirements of the Aboriginal tourism industry. Other departments should weigh in to contribute to the elements of the industry that are appropriate within their respective mandates— e.g., culture and heritage, social integration, and economic and human resource development.
- The role of ATTC is to represent the Aboriginal tourism industry and play an advocacy role. However, there is a clear consensus that ATTC should be working closely with the RATAs as the regional representatives and to work within clear demarcations between national and regional jurisdictions. ATTC provides networking opportunities for the RATAs and for Aboriginal tourism stakeholders across Canada. It also provides a vehicle for cohesive representation in international venues and events, to raise awareness about Canadian Aboriginal tourism in world markets.
- Generally, the feedback is that ATTC’s role is clear, that it needs to do more of what it is currently doing to have a greater impact and be more effective. It is also recognized, however, that to achieve this requires additional resources at ATTC.

Feedback from ATTC Partners and Government Representatives

- The role of ATTC is to support industry development through its own and RATAs' activities. The structural linkages between ATTC and RATAs need to be further enhanced.
- ATTC should be an ongoing advocate for Aboriginal tourism industry (all sectors), and should bring forth issues forwarded by RATAs to respective federal government departments.
- It is anticipated that the economic impact analysis currently in progress by ATTC will identify some of the needs of the Aboriginal tourism sectors. This should feed into the process of providing rationale for ATTC and need of its services. An issue to address will be: what kind of organization (ATTC) is needed to help address the extent of support needed by Aboriginal tourism?

Feedback from Survey of Aboriginal Tourism Operators

- Many Aboriginal tourism operators are learning the business by trial and error. There is a need for an organization like ATTC to help systematize the learning process, to develop training programs, and to help establish an infrastructure that brings industry stakeholders together in a cohesive way.
- The industry needs an advocate group. ATTC is well positioned in Ottawa to act as such. Advocacy is an important role for ATTC, to ensure that Aboriginal tourism is well recognized as a priority for federal government initiatives.
- ATTC can help bridge the gap between Aboriginal, regional local and remote operations, with national and international tourism markets—by creating a national presence and awareness of the industry and its needs in Ottawa, and by promoting the industry worldwide (particularly by participating in major events such as international trade shows, conferences and other networking opportunities).
- Most of the Aboriginal tourism operators are “new to the game”. Being able to connect with experienced contacts, e.g., as referenced through ATTC and RATA organizations, is a definite benefit that these organizations could/should provide.
- A lot of the local labour force is poorly educated, and they need organizations like ATTC and RATAs to provide learning opportunities to understand how to serve tourists professionally.
- The idea of having ATTC representing Aboriginal tourism as the “voice for Aboriginal tourism in Canada” is very well received by operators, but generally they consider the national and local presence of ATTC is insufficient, while at the same time recognizing that this is a “work in progress”.

- One of the areas most needed by operators is help in international marketing. Many of the operators are not familiar with the requirements and/or procedures to establish an international presence, or how to market to international tourists. ATTC and/or RATAs should provide some help in this direction.

3.2.2 Interdepartmental Roles

Feedback from RATAs, ATTC Board Members and Industry Representatives

- Organizations such as the Canadian Tourism Commission are key players, and ATTC should continue to nurture the relation with CTC to achieve a greater contribution from them to the initiative. ATTC, for example, could help get CTC to recognize fully that Aboriginal tourism is a thematic, identifying brand of Canada requiring support and development through organizations such as ATTC. CTC's contributions have been generous in the past, but they generally fall short of what is required to realize the full potential of what such an organization could do.
- There is a feeling generally that since several federal departments are "sitting at the table" (as ex officio members of the ATTC Board), they should be contributing financially (in a consistent and systematic way) to the initiatives and activities launched by the organization.

Feedback from ATTC Partners and Government Representatives

- The roles and contributions required from different federal government departments to help the growth and development of Aboriginal tourism are ambiguous. These need to be laid out in one strategic framework that consolidates the government's strategy.
- ATTC should be prepared to develop a strategic plan that addresses and incorporates the mandates and responsibilities of several federal departments/agencies—including Canadian Heritage, Indian and Northern Affairs, Parks Canada, Industry Canada, Canadian Tourism Commission.

Feedback from Survey of Aboriginal Tourism Operators

- Aboriginal tourism operators are not aware of specific roles or contributions of different federal government departments in supporting Aboriginal tourism product development. They seem to be mostly aware of one-time initiatives or specific projects, but very little about government programs or initiatives designed to help the tourism industry. Respective roles and contributions of federal agencies/departments such as Industry Canada, Canadian Tourism Commission, Parks Canada, Canadian

Heritage, Indian and Northern Affairs have a very low profile in the Aboriginal tourism industry.

3.2.3 Strategic Directions

Feedback from RATAs, ATTC Board Members and Industry Representatives

- Strategic directions of RATAs are not well coordinated with ATTC's strategic directions. There is a need to synchronize the development of strategies for the industry, to have a better framework for supporting the industry at different levels of operation across the country.
- One of the areas that need development that ATTC could provide leadership in is in developing a program of certification, for authenticity of Aboriginal tourism products.
- The Board of Directors of ATTC is evolving into a more dynamic and proactive Board that will help guide the development of ATTC into a more effective organization. Many members of the Board are anxious to tackle the strategic issues facing the Aboriginal tourism industry, and, as volunteers, are keen in contributing to ATTC capacity development.
- The potential of employment growth in the Aboriginal tourism industry is large, but there is a shortage of skilled people. Human resource development is a key priority and ATTC should take on the challenge to address this issue, in all tourism sectors.
- Developing a consensus strategic plan is important at this stage of the evolution of ATTC—to bring the stakeholder parties together, and to chart the long term directions of the organization.
- Several Board members want to see more strategic considerations on the agenda of their meetings, and fewer micro-management or operational and funding issues (though it is also recognized that these remain to be critical considerations).

Feedback from ATTC Partners and Government Representatives

- ATTC should work more closely with all of its federal government partners, to generate interest within these departments/agencies in Aboriginal tourism as an economic sector worthy of support and growth.
- Contributing to the marketing of Aboriginal tourism should be considered as a focus for ATTC, but also promoting the cause of the Aboriginal tourism industry.
- ATTC needs to lobby for additional resources in Ottawa.

- Activities such as updating and expanding the ATTC inventory of tourism industry organizations, and continued participation in major events, such as “Rendezvous Canada”, are a priority.
- There is a need to understand to what extent Aboriginal tourism has been developed as a marketable product, what is required to bring it to market, and how extensive a marketing initiative is required to make it successful. Such a product identification study would be necessary to help clarify some of the strategic priorities for an organization such as ATTC.

Feedback from Survey of Aboriginal Tourism Operators

- Operators need more tourism business training opportunities provided by ATTC.
- ATTC needs to help tourism operators to access government assistance, particularly in promoting Aboriginal tourism products.
- There is no organization better situated to help establish standards for the business than ATTC. But this hasn’t happened so far. ATTC needs to tap into federal resources to develop standards for the Aboriginal tourism industry. This includes setting up a certification system for operators, and developing accreditation credentials for Aboriginal tourism authentication.
- Aboriginal tourism is made up mostly of small businesses. ATTC should develop a strategy that is specifically tailored to help small operators. Therefore, understanding the needs and challenges of small business is a critical first step for ATTC. A project focused on this should be initiated.
- Strategically, ATTC and RATAs need to differentiate between the different needs of tourism industry sectors, and their specific needs. For example, the business support and needs of tour operators are different from those of accommodation providers. Other key stakeholders in the Aboriginal tourism industry, such as artists and performers, and other producers of Aboriginal products and attractions, also have unique requirements—although everyone needs tourists.
- Aboriginal operators consider that the role of ATTC and RATAs is for the “long-haul”. In other words, any strategy for developing a national Aboriginal tourism industry should be long-term, allowing for consistency and perseverance. For example, any effort to create an international presence through regular forums such as ITB (International Tourism Bourse) should be sustained year after year—to benefit from the cumulative exposure and experience.

3.2.4 Scope of the ATTC Initiative

Feedback from RATAs, ATTC Board Members and Industry Representatives

- It is not the role of ATTC to get into hands on product development activities, but rather to help tourism product developers to promote their business.
- In this respect, a great deal of creativity is required in setting the agenda, identifying the priorities for ATTC, and preparing strategic directions commensurate with an appropriate scope that addresses the challenges of the Aboriginal tourism industry – e.g., human resource development, marketing and promotion, use of modern technology, and the integration with the mainstream tourism industry of Canada.
- Somehow it is expected that ATTC would lobby for the whole Aboriginal tourism industry in Canada—but this is a diverse group across the nation, and it is pretty hard for one association to represent all groups. Nonetheless, ATTC is the only such organization available to the Aboriginal tourism industry, and as such, appears to have widespread support for continued presence and growth.
- The role of RATAs should be to serve as a network of associations serving regional and local needs of the Aboriginal tourism industry across Canada. This is seen particularly in the context of a need to further develop RATAs in each province, to address grassroots issues of the industry. ATTC, on the other hand, is seen as more of an umbrella organization – i.e., the “glue” that supports and keeps the network of associations together.

Feedback from ATTC Partners and Government Representatives

- ATTC and RATAs are mostly understaffed given the extent of requirements for their realized or potential services to the Aboriginal tourism industry.
- ATTC and RATAs need to free up their resources to carry out their mandate—but the only way they can do this is if they secure funding on a multi-year basis, as opposed to yearly renewals that are not necessarily guaranteed.
- What ATTC needs now are stability, consistency, and growth of capacity. Proper management of challenges and growth is also crucial, as well as being accountable using a performance framework set against clearly specified goals.

Feedback from Survey of Aboriginal Tourism Operators

- Operators would like to see ATTC broaden its scope to directly support more training and hospitality courses—perhaps through developing partnerships with local colleges and schools, and by helping fund such initiatives.

- ATTC should be in a position to provide advertising and marketing opportunities for the industry—free-of-charge. Examples suggested by survey respondents on how this could be done include: advertising opportunities through the ATTC and/or RATA websites, marketing and advertising opportunities in venues and events sponsored or attended by ATTC and/or RATAs (e.g., conferences and trade shows), and brochures and mailings of newsletters and other printed materials of these organizations. This additional expense might be a cost to the taxpayer in the short-term, but the benefits of developing a vibrant Aboriginal tourism industry outweigh the costs—particularly in terms of revenues gained in the economy in general, and specifically in terms of employment opportunities developed for Aboriginal communities, and also for Canadians in general.
- Many of the operators commented on the fact that the Aboriginal tourist industry needs to be fully interactive with the Canadian tourist industry in general, to be effective in delivering their products. As such, ATTC could broaden its scope to provide a link between the two.

IV. Results Expected and Achieved

The findings of the review on issues related to results expected and achieved by ATTC are contained in this section of the report. Findings on the operational effectiveness of the organization and the delivery of ATTC services are also presented. Also some findings on options and lessons learned regarding this initiative are included in this section.

4.1 Initiative Design and Delivery Issues

4.1.1 Leadership

Feedback from RATAs, ATTC Board Members and Industry Representatives

- ATTC has shown leadership in setting itself up as a national voice for Aboriginal tourism. However, without government assistance, ATTC would not be sustainable. The industry itself is not mature enough to fund an organization such as ATTC, or the RATAs. In time, ATTC should diversify its funding sources, and manage the process to be inclusive of different levels of government and industry representation. “They need to be more ‘business-minded’ in securing financing.”
- ATTC is represented in various national venues and boards (e.g., TIAC, CTHRC), to help support the industry. The Executive Director is approachable and well connected to key partners and stakeholders.
- However, resources at ATTC and limited staff impinge on its potential for addressing major challenges of the industry such as access to financing, training, use of technology, etc.
- ATTC contacts and influence should extend to the political representatives in government as well as the bureaucracy. Often the leadership in the political arena can overcome the challenges faced (or caused) by bureaucratic processes, challenges that hinder strategic initiatives geared to helping industry development.
- The issue of RATAs in the Atlantic provinces has not been resolved sufficiently. There is a need to develop separate RATAs within each province—since the different communities in the Atlantic represent distinct Aboriginal entities.¹⁰

¹⁰ Since completing this review study, Prince Edward Island has started a process to develop articles of association for a RATA in that province.

Feedback from ATTC Partners and Government Representatives

- ATTC has been developing its credibility within the community of Aboriginal tourism organizations. It is at a crossroads at this time, and needs to build on the credibility it has been developing. The turning point is defined by the high expectations built up in the industry, and the requirement to provide more support and services to help raise the profile of the industry, and help develop its capacity to increase revenues and employment within the Aboriginal communities of Canada.

Feedback from Survey of Aboriginal Tourism Operators

- ATTC should take the lead in helping Aboriginal tourist operators to network with mainstream tourism organizations in Canada. The full potential of Aboriginal tourism can only be realized if this link is effectively made. More often than not, tourists in Canada wish to have a multi-faceted tourist experience, which could include Aboriginal and non-Aboriginal features.
- Some operators feel that ATTC and RATAs have put too much emphasis on networking and bringing industry stakeholders together, and not enough focus on fundamentals of the business. They feel that providing support to industry to learn the entrepreneurial skills required to be successful is essential, and providing assistance in identifying funding sources and opportunities is needed. Also leadership in providing marketing and promotional activities rate very high as part of the “wish list” of operators.

4.1.2 Funding

Feedback from RATAs, ATTC Board Members and Industry Representatives

- ATTC is unlikely to be self-sustainable in terms of funding. It is highly dependent on government support to maintain a level of activity and operations appropriate to the challenge of developing the Aboriginal tourism industry in Canada. Similarly, RATAs are not self-sustainable without federal and/or provincial support.
- ATTC needs stability and consistency in funding. A three-year funding agreement, and multiple sources of funding for operations as well as projects is the desired formula.
- Some of those interviewed suggested that a clearer strategy for raising funds from multiple sources, for ATTC and for RATAs, was needed.

Feedback from ATTC Partners and Government Representatives

- Government often either over-funds or under-funds its initiatives. It is rare to find an initiative with just the right funding for the purpose it was set up. In the case of ATTC and RATAs it appears that the scope of the work needed is such that more funding is required, all around. There is consensus among those interviewed that the funding should be available from multiple sources, and that ABC has done its fare share of providing assistance. Other organizations need to step up to the plate and support the initiative financially. However, the onus is on ATTC to do the “leg-work” to make this happen.
- Short and long-term financial needs of ATTC need to be developed and presented within a strategic framework that encompasses the ATTC vision and directions, but also in terms of federal departmental mandates and roles and responsibilities of several departments—not just in terms of Industry Canada (ABC) context.
- Funding is always a pre-occupation of the Board of Directors meetings—so much so that it often dominates the agenda to the detriment of other priorities and challenges requiring input from Board members.
- Everyone agrees that ABC (Industry Canada) should not be footing the whole bill for ATTC core funding. The challenge is to get other partners to contribute financially, and to consider the role and contribution of ATTC more seriously, for delivering the necessary support in the development of Aboriginal tourism—which is within several departments’ mandates.

Feedback from Survey of Aboriginal Tourism Operators

- Generally, tourism operators understand the need for government funding of initiatives such as ATTC—and their response is positive on the need for government to do this, even if it requires taxpayer money. It is considered an essential service that governments at all levels should contribute to.
- They do not consider this to be the domain of only one department (i.e., Industry Canada), or one level of government (i.e., federal).
- Many operators have also asked for funding support—especially for smaller operators who need start-up funding to develop their tourist products. They consider that it is a role of ATTC and RATAs to help them access government programs that provide funding for industry and business development.
- Special consideration should be given for providing funding to address issues of language differences—i.e., for multiple translations of key documents, presentations and training opportunities.

4.1.3 Reporting and Accountability

Feedback from RATAs, ATTC Board Members and Industry Representatives

- It is important to clearly articulate whom ATTC is accountable to, whom they represent, and whom they report to in terms of roles and responsibilities, and performance. Without an overall strategic framework, that embraces different mandates of federal departments and respective funding sources, it is difficult to achieve a cohesive basis for operations.
- Feedback suggests that reporting by ATTC to its “constituencies” is transparent and comprehensive, but requires more consistency and to be based on a results-oriented framework.
- Feedback from Board members suggests that reporting to the ATTC Board is “fairly full” but it could be improved. The RATA members of the Board are interested in making ATTC more accountable to them, i.e., to demonstrate how ATTC is helping RATAs with respect to results achieved in terms of communications goals, networking, and production/distribution of pertinent information and materials, and project activities.

Feedback from ATTC Partners and Government Representatives

- ATTC should build into its operations a more effective performance measurement framework, to report to the Board on progress, and to report to its funding sources about the results and achievement of goals set out in its accountability accords.
- To muster support and to convey the story on its accomplishments to date, ATTC needs to write-up/compile some of its success stories in a handy format, for dissemination to stakeholders and funding sources.

Feedback from Survey of Aboriginal Tourism Operators

- Feedback on reporting and accountability was not sought as part of the survey of Aboriginal tourist operators.

4.1.4 Operational Effectiveness

Feedback from RATAs, ATTC Board Members and Industry Representatives

- After a lot of growing pains, it is generally felt that ATTC is finally beginning to reach its potential.
- The ATTC Administration, working closely with its Board, is improving in its ability to deliver—but access to long term resources and capacity building will continue to be a recurring issue if operations are not streamlined.

Feedback from ATTC Partners and Government Representatives

- By having a more effective performance measurement framework, ATTC can build into its management structure some of the modern management techniques built into new Treasury Board Secretariat policies and guidelines,¹¹ and become a more results-oriented outfit.
- ATTC needs an organizational development plan – and to monitor the extent to which they are achieving their goals. They also need a current strategic plan on which to base the development and growth of the organization.
- ATTC needs to articulate the needs of the industry more effectively.
- The ATTC Board is becoming more forward looking. It needs to become less pre-occupied with day-to-day funding or operational issues and more focused on the strategic challenges ahead.
- To gain support, ATTC needs to document some of its recent success stories, in a brochure that gets widely circulated.

Feedback from Survey of Aboriginal Tourism Operators

- Feedback on operational effectiveness was not sought as part of the survey of Aboriginal tourist operators.

¹¹ See the Treasury Board Secretariat's website on "modern management practices" at: http://www.tbs-sct.gc.ca/cmo_mfc/index_e.asp.

4.2 Reach, Impact and Results

4.2.1 Client Reach

Feedback from RATAs, ATTC Board Members and Industry Representatives

- A national website “portal” that links relevant sources and organizations in Aboriginal tourism is needed—to provide a comprehensive and interactive web presence for Aboriginal tourism. Currently, the series of RATA and ATTC web sites represent a beginning, but not a sufficient or potentially effective utilization of online technology.
- There have been numerous articles, news briefs, editorials and information bulletins authored or sponsored by ATTC staff and Board members that have helped create a national presence for ATTC and Aboriginal tourism in the published media [examples of these are listed in the bibliography, Appendix A]. This kind of activity is to be encouraged and appears to be much appreciated by stakeholders in Aboriginal tourism.

Feedback from ATTC Partners and Government Representatives

- ATTC needs to reach out to disseminate more information about what it does, or potentially could do, to help operators. The issues is one of “doing more of the same”, to have a more discernable impact on the industry.
- It may be a resourcing issue, but ATTC should develop a strategy to communicate with the industry on a more regular basis.

Feedback from Survey of Aboriginal Tourism Operators

- Those operators who have heard of ATTC, agree with the need for this organization, and with what it is doing, but feel it could do more to raise awareness about itself, and its services to the industry.
- ATTC really needs to make itself known, to explain what they do so that operators can use them more when and if appropriate.
- Web pages of ATTC and RATAs seem mostly static descriptions of the organizations and what they do. Need more dynamic frameworks for these web pages that provide current information on the goings on in the industry, and on events and opportunities available. An up-to-date database on Aboriginal tourism operators could/should also be accessible through the ATTC web page. Many tourism operators also said that they would appreciate a link to their operations through RATA/ATTC web pages.

- This helps create a more networked industry providing online presence to tourists and operators alike.
- It is perhaps more necessary to keep in regular contact with RATAs, and occasional contact with ATTC. Funding for networking and communications needs to reflect this. RATAs need to be on a regular contact basis with their regional and local Aboriginal tourist businesses—to be most effective in helping them.
 - Notwithstanding the limited resources available to ATTC and RATAs, several operators suggested that ATTC and RATAs should organize regular tours at the grass roots level, to become more familiar with the players and the products in the Aboriginal tourism industry.

4.2.2 RATAs

Feedback from RATAs, ATTC Board Members and Industry Representatives

- The continued sustainability of several of the RATAs is an important issue for ATTC to tackle. RATAs are typically small outfits with one, two or three persons carrying the workload (with some exceptions). Although these are regional associations, they nonetheless have a large field of operation, dealing with many Aboriginal tourism sector development issues. To be effective, they need national support, and to learn from each other in delivering services to their respective jurisdictions. ATTC provides them with opportunities and information to enhance their capacity to deliver, but there is room for more.
- ATTC has been consistent in its support for the development of the RATAs.

Feedback from ATTC Partners and Government Representatives

- Would like to see more input into ATTC from RATAs, in terms of their needs and strategic directions. Need to clarify the respective roles of RATAs and ATTC with respect to national and regional jurisdictions, funding responsibilities, and joint activities and projects.

Feedback from Survey of Aboriginal Tourism Operators

- RATAs provide useful materials and information to operators. They host workshops on Aboriginal tourism issues and bring the industry together in events that provide a forum for interaction and networking.
- RATAs could assist operators to obtain financial help when they need it, to help grow their business, or to take advantage of networking opportunities.

- RATAs should help promote and advertise the local/regional Aboriginal tourism attractions and organizations in the different tourism industry sectors.
- RATAs generally seem more visible than ATTC to the local operators. Many of those operators who are aware of their respective RATAs feel that they are more helpful than ATTC—and that they provide necessary opportunities for networking and training. But most feel not enough is being done in this respect, in comparison to the great potential in the industry.

4.2.3 Results Achieved

Feedback from RATAs, ATTC Board Members and Industry Representatives

- One of the biggest accomplishments of ATTC is in bringing the regions together. In creating a forum for interactions between regional representatives, it has provided the framework for national presence and awareness about Aboriginal tourism as an industry.
- Key successes of ATTC, as seen by Board members, include events such as the Roundtable with Minister Sheila Copps, Canadian Heritage; the Aboriginal Tourism Identity Project; the publication of checklists for success of Aboriginal businesses; the Aboriginal Business Planning Guide; identifying trends and statistics on markets and opportunities for Aboriginal tourism; the national awareness poster project; the networking and linkages with RATAs; newsletters and other communication materials shared with the Aboriginal tourism industry at large; and other similar activities and products that are helping to develop a foundation and to build strong relationships for a more sustainable ATTC organization representing Aboriginal tourism.
- ATTC is working towards becoming an effective clearinghouse for information, on behalf of Aboriginal tourism associations. There is consensus that this role for ATTC is needed and should continue.
- The checklists for success produced by ATTC were very well received by the industry, but some have suggested that now the next step is to develop more regionalized information and “how to” guides that go beyond the general checklist format.

Feedback from ATTC Partners and Government Representatives

- ATTC has been successful in setting up an effective Board of Directors to guide the work of the organization, and to provide opportunities for networking and leveraging its activities, to help grow the Aboriginal tourism industry.

- ATTC has established a framework for linkages to RATAs and to federal government partners, and provides the basis for developing a more cohesive infrastructure of support for Aboriginal tourism.
- Successes of ATTC include its extensive ability to engender communications between stakeholders in the Aboriginal tourism industry; newsletters and website; participation in major tourism forums, including contributing booths and posters, etc.; developing business development checklists; developing an inventory database; contributing to a network of RATAs and linkages with and between regions; using the ATTC Board as an outreach vehicle; beginning to develop partnerships and collaborations with other stakeholders in the Aboriginal tourism industry.

Feedback from Survey of Aboriginal Tourism Operators

- The various brochures, articles and materials produced by ATTC and RATAs do not necessarily bring in more tourists, but they help the industry understand its potential and provide a first step for newcomers into the industry.
- Newsletters and conferences produced and organized by ATTC provide a basis for nation-wide communications in the industry.
- ATTC and RATAs could help operators “by sending clients their way”. They are not sure exactly how to make this a systematic service, but seems appropriate that these organizations develop a process by which to bring tourists in contact with the operators. Perhaps developing and publishing a directory of operators by type of product/service might be a start.
- Some of the RATAs are very helpful to new companies starting-up their Aboriginal tourism operations. But business growth and development services for the more mature organizations are much less effective.
- There are insufficient results on initiatives for training and development of human resources in the Aboriginal tourism business. Operators seem consistent in their request for more training and development opportunities in areas such as: customer services, marketing, business operations and management, partnerships and networking.
- Aboriginal tourist operators generally understand that developing their industry as a whole is a long-term project—requiring perseverance and consistency on the part of organizations such as ATTC. While they expect positive results and contributions from ATTC and RATAs in the short-term, they also believe that without a long-term vision and strategy, the industry will fall short of its full potential.
- Generally, ATTC rates very high in effort by those operators who are familiar with the organization. However, expectations are high for results, as ATTC grows and expands its capacity to help the industry, in the months and years to come.

- A large part of the success of ATTC in reaching out to the Aboriginal tourism industry is due to a successful newsletter, and occasional communications sent to multiple recipients across Canada.
- A few operators seemed tired of being surveyed and suggested that there is a need for more emphasis on results and less on studies of the issues.

4.2.4 Options and Lessons Learned

Feedback from RATAs, ATTC Board Members and Industry Representatives

- Some Board members suggest that to enhance the level of interaction with other federal government departments (i.e., other than Industry Canada), a more senior level of representation from these departments is needed on the Board.
- One of the areas that ATTC (and RATAs) could become more active in is working with local schools, colleges and universities to develop skills training programs for the Aboriginal tourism industry.
- There is a need to “graduate” from activities which emphasize creating awareness about the Aboriginal tourism industry (necessary as this may be), to tackling fundamental growth and development issues of building an industry infrastructure, with the necessary human resources capabilities, product development, marketing, and delivery of tourism packages. An example cited of product delivery by ATTC is to develop an Aboriginal Travel Guide (similar to that of Yukon First Nations). ATTC could tackle such a project for Canada as a whole.
- Feedback suggests that ATTC should broaden its reach internationally, to more consistently participate in tourism events and trade shows (such as the ITB trade show in Berlin, Germany)—and that this initiative should be on a sustained, year-after-year basis, to create a continuous and persistent presence on behalf of Aboriginal tourism in Canada. The scale of this kind of initiative, to be effective, should be greater than the current level of commitment.

Feedback from ATTC Partners and Government Representatives

- ATTC is still in development several years after its inception. There is a need to address how to grow the organization to fulfill its mandate with respect to the large task of helping develop Aboriginal tourism.

Feedback from Survey of Aboriginal Tourism Operators

- ATTC could develop some kind of lexicon on different terms relevant to Aboriginal tourism industry – to help non-Aboriginals understand some of the key words associated with Aboriginal tourism events and opportunities.
- There is strong expression for help in training—especially in areas involving customer services, public relations, and general operations of tourism businesses.
- Many operators feel that ATTC and RATAs are good at helping them establish contacts in other sectors of the industry, but that they should also help in developing new markets for Aboriginal tourism products.
- Many of the operators are in remote locations that are not readily accessible. They need to be in contact with travel agencies, and other tourism organizations in the transportation and accommodation business, in order to get on tourist packages offered through the mainstream tourist industry. ATTC and RATAs are not particularly focused on this issue, and do not have the additional resources. They could, however, contribute to addressing this issue – possibly through use of the Internet or other mechanisms such as referrals and networking opportunities.
- ATTC and RATAs should combine their efforts to provide an online, interactive bulletin of events and opportunities, to serve both the tourist industry and tourists at large. Postings of national events, art shows, tourist packages, etc., as well as links to tourist operators across the nation would help promote the industry in a more cohesive fashion.
- The Aboriginal tourism product is not homogeneous in nature, language or cultural idiosyncrasy. ATTC should develop its strategy and approach for future support with a greater sensitivity to the heterogeneous character of Canadian Aboriginal groups and regions. Different languages and cultures of Aboriginal peoples make their tourist product more robust and attractive to tourists.
- ATTC and RATAs should combine their efforts to develop an up-to-date directory on Aboriginal tourism organizations in Canada, by sector and location. This should be both an online and offline document—with very wide circulation.
- There is an opportunity for ATTC to develop its capacity to become a clearinghouse for information on Aboriginal tourism in Canada. Feedback from operators who are familiar with ATTC suggest that the information is mostly intermittent and piecemeal.

4.3 Survey Results

- Survey results show that ATTC and the RATAs have achieved some success in reaching out to the Aboriginal tourism community (the industry sector operators).

- Of 118 Aboriginal tourism organizations interviewed, 16 percent said that they were “familiar” with ATTC, 25 percent said they were “somewhat familiar” and 59 percent said they were “not familiar”. While this appears to be a low percentage of familiarity, in fact it is a very good result when one considers that ATTC is a relatively new organization with limited resources and staff, and a national mandate working out of Ottawa (i.e., not at the regional or tourist operator’s jurisdiction).
- Similarly, RATAs have also been moderately successful in reaching out to Aboriginal tourist organizations. Out of 118 Aboriginal tourism organizations interviewed, 27 percent said they were “familiar” with their local (i.e., regional) RATA, 16 percent said they were “somewhat familiar”, and 57 percent said they were “not familiar”.
- Of those who were “familiar” or “somewhat familiar” with ATTC and/or RATA, 22 percent were able to identify directly with some specific ATTC and/or RATA project-related activity.
- Of those who could identify with some specific ATTC and/or RATA project-related activity, 40 percent said that they thought the project(s) had a definite impact on improving awareness of, and/or helping promote/market tourism in their respective regions.
- More than half of those organizations that said they were “familiar” or “somewhat familiar” with ATTC felt that more should be done by this organization to promote Aboriginal tourism in Canada.
- Generally, about 45 percent of those “familiar” or “somewhat familiar” felt that ATTC could do more market research to identify business opportunities; 40 percent felt that ATTC should do more trade shows/missions; 52 percent felt that ATTC should do more promotional activities and networking events; 56 percent felt that ATTC should provide more educational materials and opportunities.
- Several (about 55 percent) of those organizations that had not heard of ATTC, or the relevant local RATA, said they would like to hear more about them and agreed in principal that such organizations were needed.
- None of the organizations interviewed would attribute any of their personal successes in the industry to any ATTC or RATA related activities or services. However, encouragingly, about 20 percent suggested that at least “some success” of their organizations could be attributed to either an ATTC or RATA related activity or service.

4.4 Project Activities

- A large majority of ATTC Board members, RATAs, and government partners interviewed indicated that ATTC’s project activities have been adequate over the past three years. The projects undertaken have been relevant and contributed in varying

ways to the challenge of understanding the industry and its needs, in promoting Aboriginal tourism, and in supporting the development of industry capacity and products.

- However, it was also suggested that the dissemination of results of projects could be more widespread, since there appears to be a strong appetite for this information among the industry partners and tourism organizations.
- RATAs in particular strongly endorse the ATTC project activities and related information products, since RATAs (as well as ATTC itself) consistently receive requests for the type of information that ATTC has been producing over the past three years. This includes newsletters, guides to doing business and brochures, checklists, media articles, and other similar information products, and referrals.

4.5 Organizational Issues

- The effectiveness of an organization generally can only be assessed against expectations, stated goals in operational plans, and level of effort required and realized by the organization.
- In this respect ATTC, with only three full-time staff members, is considered to be productive, especially over the past three years, by a majority of ATTC Board members, government partners, and RATA representatives interviewed. However, there is also the view that more effort is required, and a broadening of the scope of activities with additional staffing support is needed.
- Board members participate on a voluntary basis, and their pro-active contributions help broaden the reach and effectiveness of ATTC. However, Board members are expected to (and do) contribute to strategic directions and challenges in responding to Aboriginal tourism opportunities. Long-term funding challenges need to be resolved and ironed out so that Board members could turn more of their attention to more fundamental challenges and requirements of helping to develop the Aboriginal tourism industry throughout Canada.

4.6 Performance Measurement

4.6.1 Discussion

- Due diligence requires appropriate reporting for accountability purposes in response to requirements of funding sources.
- ATTC quarterly reports provided to ABC are detailed and sufficient for accountability purposes, but evaluation indicators and performance measures that are tracked against strategic or operational goals of ATTC are required, in a handy way for ABC to monitor and assess progress on a routine basis.

- As the main provider of core funding to ATTC, this is a minimum requirement by ABC to address due diligence and evaluation requirements that are common to all government departments and agencies. There is a need for interaction between ABC and ATTC on this matter to discuss and agree on a set of relevant indicators for this purpose. Pertinent indicators and performance measures are suggested in the next section of this report (Section 4.6.2).
- These requirements are intended to determine to what extent ATTC has achieved its objectives, at least on an annual basis, and has completed its prescribed statement of work with ABC while realizing appropriate value for resources contributed by ABC.
- ATTC has provided in the past some very good examples of accountability reporting. For example, a survey of ATTC newsletter recipients provided useful feedback on the content and format. Specifically, 83 percent of the readership found the newsletter layout to be very good or excellent, 74 percent rated the pertinence of information as very good or excellent. 59 percent indicated that the information was very easy to follow, and 68 percent believed that the newsletter covered a very good/excellent range of topics.
- A large percentage of the readership expressed an interest in success stories about Aboriginal tourism businesses from across the country. They also want to learn more about marketing in Aboriginal tourism. A significant amount of the respondents told ATTC to “keep up the good work”.
- Another example of ATTC accountability is feedback it obtains from key events it organizes. For example, in the National Forum on Aboriginal Tourism 2001, ATTC requested feedback on satisfaction (including pertinence, sharing of knowledge, delivery, clarity, interest) on all the sessions of the Forum. The results of the feedback were made available in a final report and evaluation. Fifty percent of delegates who responded to the evaluation gave an overall rating of the Forum as very good and the other fifty percent rated the Forum as excellent. The majority of workshops and panel discussions were rated as very good. Delegates’ specific comments were also published in the Final Report on the Forum.
- The 2000-2001 Annual Report of ATTC did a good job of describing the project activities and achievements of ATTC in that period. Events such as the Ministerial Roundtable on Aboriginal Tourism, co-organized by Parks Canada, Canadian Heritage, and ATTC, and the key partnership effort with Air Canada and the Canadian Tourism Commission for an original Aboriginal design that was painted on the side of a Boeing 767, were well documented. Results of these events were profiled and disseminated appropriately.
- Other accountability reporting by ATTC include a presentation to the National Aboriginal Economic Development Board’s Tourism and Trade Sub-committee (March 2001) on the issue of leveraging core funding with matching funds and in-kind contributions. For example, it was reported that for \$387,500 of ABC core

funding, RATAs were able to attract, as a network of associations, over \$2.1 million in additional funds for core activities. With in-kind contributions, an additional \$183,000 was referenced. As a network, the leverage ratio claimed by ATTC was almost 6:1 against ABC core dollars. And, with project funds added in—RATAs generated \$3.6 million of activity in support of Aboriginal tourism that fiscal year.

- Further accountability reporting is provided by ATTC, directly to ABC, on a quarterly basis in the form of financial variance reports and activity reports providing information on status of goals and targets met. These documents are succinct and appropriate in format and level of detail—neither too much information nor too sparse.
- Where there appears to be a shortfall in performance measurement reporting, however, is in the regular tracking of key indicators that provide reference to the status of the key strategic directions of ATTC.

4.6.2 Suggested Performance Measurements

- The stated strategic directions of ATTC, as mentioned in an earlier section of this report, are as follows:
 - **Industry development**—To support the new development and expansion of Aboriginal tourism products that meet or exceed market standards.
 - **Community awareness and capacity development**—To increase awareness of Aboriginal tourism as an economic development opportunity through increased community level initiatives. To increase the capabilities of regional associations so they can better assist industry development and provide better services to existing businesses.
 - **Marketing and partnership building**—Assist industry growth and create greater awareness of and therefore increase market share for Aboriginal products and services within both domestic and international tourism markets.
 - **Human resources development**—To support skill development initiatives in order to increase the participation of Aboriginal people in the tourism industry. To support Aboriginal youth.
 - **Communications**—To ensure effective and consistent communication with stakeholders. To advocate the key directions of ATTC.
- Exhibit 4.1 provides a suggested set of performance measurements to track some of these key strategic directions of ATTC. These indicators are illustrative examples (qualitative and quantitative) of what ATTC could potentially compile on an ongoing basis, and track over time, at least annually (in some cases more frequently), to monitor progress and results.

- Ultimately, however, the selection of performance measurements used will depend on the strategic objectives established by ATTC and its Board, and as agreed to with funding sources. Until ATTC has a current, finalized Strategic Plan, the appropriate set of performance measurements cannot be finalized.
- Naturally, the issue of resources and ATTC's capacity to undertake a performance tracking exercise needs to be factored into the process. Note, however, that some of the examples listed in Exhibit 4.1 are already frequently compiled and reported on by ATTC.
- An indication of relative costs of tracking each performance measurement is also provided in Exhibit 4.1

Exhibit 4.1: Examples of Pertinent Performance Measurements with Relative Costs of Tracking

STRATEGIC DIRECTION	Qualitative/Quantitative Measurements	Relatively Low Cost	Relatively Medium Cost	Relatively High Cost
Industry Development	▪ Evidence of progress in positively impacting on federal government policies and programs in the interest of the Aboriginal tourism industry.		√	
	▪ Direct (dollars) or indirect (in-kind) support to industry from public sources (federal/provincial).	√		
	▪ Sponsorships generated for industry development projects.	√		
	▪ Progress in establishing industry standards for authenticity.		√	
	▪ Profiles of success stories.		√	
Community Awareness & Capacity Development	▪ Client survey (once a year) to identify extent of community awareness about Aboriginal tourism issues and potential, and to get feedback on ATTC/RATA services.			√
	▪ Evidence of progress in establishing industry capacity (e.g., product identification/inventory, number of Aboriginal tourism organizations within each sector, RATA successes).			√
	▪ Profiles of success stories.		√	
Marketing and Partnership Building	▪ Number of marketing events organized by ATTC.	√		
	▪ Feedback on results of these events from participants.		√	
	▪ Industry satisfaction with ATTC marketing events and activities.			√
	▪ Profiles of success stories resulting from marketing events.		√	
	▪ Market penetration statistics (e.g., number of tourists and markets reached).			√
	▪ Number of partnerships established (private/public sector).	√		
	▪ Funding leveraged from partners.	√		
	▪ Profiles of success stories resulting from partnerships.		√	
Human Resources Development	▪ Number of training packages developed and role of ATTC in facilitating or bringing these about. ▪ Enrollment in these training initiatives.	√		
	▪ Evidence of progress in establishing industry standards for training and certification of skills.		√	
	▪ Training tools developed (e.g., self-help, "how to" guides, and checklists).	√		
	▪ Profiles of success stories.		√	
Communications	▪ Number of ATTC citations in media (announcements/events /references/quotations). Type of media coverage and circulation.		√	
	▪ Number of articles published in industry literature (internationally, nationally, locally).	√		
	▪ Feedback from stakeholders in industry on results of communications activities of ATTC (feedback on, e.g., Newsletters, referrals by ATTC, networking events, media opportunities, product promotions, poster campaigns, ATTC website effectiveness, extent of national/international coverage by ATTC activities).			√
	▪ Profiles of success stories.		√	

V. Conclusions

5.1 Need

- The review confirms the need for an ATTC-like organization.
- There is sufficient evidence from market studies that Aboriginal tourism in Canada holds strong potential for growth, and is a source of employment and economic development for Aboriginal communities throughout Canada.
- Aboriginal tourism organizations from all tourism sectors suggest that an Ottawa-presence, and a national organization to represent Aboriginal Tourism in Canada is required on a continuing basis, to promote and help develop the Aboriginal tourism product and to provide a voice representing the interests of this industry in Ottawa.

5.2 Interdepartmental Roles

- However, it is also suggested that a coordinated, cohesive federal (interdepartmental) policy for Aboriginal tourism be introduced. In addition to Industry Canada, several departments have an interest and are partners in the work of ATTC, including Canadian Tourism Commission, Canadian Heritage, Indian and Northern Affairs, and Parks Canada. There is not a clear consensus on the roles and contributions required from different departments and how these should be coordinated under one strategic framework that consolidates requirements of the ATTC initiative.

5.3 Role of RATAs

- The role of RATAs as a network of associations, serving regional and local needs of the Aboriginal tourism industry across Canada, is confirmed by this review study. This is seen particularly in the context of a need to further develop RATAs in each province to address grassroots issues of the industry. ATTC, on the other hand, is seen as more of an umbrella organization – i.e., the “glue” that supports and keeps the network of associations together.
- RATAs are at different stages of development in different regions of Canada. This partly stems from how long they have been in business, and partly to their relationships to local and regional government organizations and private sector participants. It also depends on their respective financial support base and range of activities.

5.4 Strategic Directions and Scope of the ATTC Initiative

- There is a need for a strategic review that consolidates the rationale for an ATTC-like organization, defines more clearly the roles and commitments of different participants and partners in the initiative, provides for more consistent and diversified funding sources, and scopes out the program in a manner consistent with the opportunities and challenges of developing the Aboriginal tourism industry in Canada.
- The scope of ATTC, as it currently stands, may not be sufficiently broad enough to address the full range of potential challenges involved, to develop Aboriginal tourism in Canada to its full capacity.
- The “strategic review” suggested above, should consider the issue of scoping out ATTC against a broader federal mandate, and interdepartmental strategic framework.

5.5 Leadership

- Generally, partners of ATTC who were interviewed for this study have given high marks for the progress made by ATTC in establishing a national presence, and in promoting Aboriginal tourism in various networking venues, media and interest groups.
- There is also a general notion that the administrative requirement of setting up an ATTC organization in Ottawa has substantially succeeded, and that ATTC’s presence and profile has increased incrementally over the past three years.
- A strong base has been established to build on, but more effort is required to broaden the reach and effectiveness of the organization, and to address critical strategic issues related to promoting and developing Aboriginal tourism in Canada.

5.6 Funding

- There is a consensus among ATTC Board members, ATTC staff, RATA organizations and government partners and participants in the ATTC-related initiatives, that core funding for ATTC needs to become more diversified and consistent with a broader strategic framework that encompasses several federal interdepartmental mandates.
- There is also a consensus that ATTC cannot be a financially “self-sustaining” organization, at least in the foreseeable future (i.e., over the next three years).
- This does not preclude contemplating undertaking cost-recovery activities such as charging membership dues, conference fees, or payments for information services.

Some corporate and private sponsorships and in-kind contributions are potentially sources of support, but at this point this represents a funding option that has not been fully assessed/explored by the organization.

5.7 Aboriginal Tourism Industry Perspectives

- While a majority of the tourism organizations interviewed for this study were not well familiar with ATTC or respective regional associations for Aboriginal tourism, they nonetheless consider it to be essential that such organizations have the support of government and of the industry itself.
- They also suggested that they would like to see a stronger presence in providing information services about Aboriginal tourism, and that promotion of their products be provided a higher profile by ATTC in Ottawa—and of course in the various market areas where their tourists come from, particularly the U.S., certain parts of Europe and Asia-Pacific Rim, in addition to Canada.

5.8 RATA Perspectives

- All RATAs suggested that ATTC funding sources should be more diversified, but all were appreciative that Industry Canada continues to contribute to the extent that it has over the past three years.
- In recognition that Industry Canada has a specific mandate within the federal government, RATAs are consistent in their view that the Aboriginal tourism issue is an interdepartmental matter, and that the Industry Canada mandate only partially addresses the full requirements of this industry. Other federal partners in ATTC include Indian and Northern Affairs Canada, Canadian Heritage, Canadian Tourism Commission, and Parks Canada.
- All RATAs consider that there is a strong need for other government participants in ATTC to contribute to core funding requirements, as well as project-related funding.

Appendix A: References Reviewed

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- Aboriginal Tourism Association of Southern Ontario: www@atso.com
- Niitsitapi Tourism Society of Alberta: www.niitsitapi.com
- Manitoba Aboriginal Tourism Association: www.mbata.ca
- Northern Ontario Native Tourism Association: www.nonta.net
- Nunavut Tourism: www.nunatour.nt.ca
- Northwest Territories Arctic Tourism: www.nwttravel.nt.ca
- Quebec Aboriginal Tourism Corporation: www.staq.net
- Yukon First Nations Tourism Association: www.yfnta.org

Appendix B: Alphabetical List of Key Informants

- **Duane Auramenko**, Aboriginal Business Canada
- **Radek Bandzierz**, Aboriginal Business Canada
- **Lori Beaver**, Niitsitapi Tourism Society of Alberta
- **Mark Boucher**, Aboriginal Business Canada
- **Colleen Bruce**, Northwest Territories Arctic Tourism
- **Stacey Bruyere**, Emo, Ontario
- **Maureen Bundgaard**, Nunavut Tourism
- **Jean-Yves Cayen**, Canadian Heritage
- **Camille Choquette**, Indian and Northern Affairs Canada
- **Rick Cognale**, Aboriginal Tourism Team Canada
- **Reg Crowshoe**, Niitsitapi, Tourism Society of Alberta
- **Mark Dokis**, Aboriginal Business Canada
- **Virginia Doucett**, Aboriginal Tourism Team Canada
- **David Elgie**, Aboriginal Business Canada
- **Jerry Ghazal**, Indian and Northern Affairs Canada
- **Guylain Gill**, S.T.A.Q/Quebec Aboriginal Tourism Corporation
- **Chris Hamden**, Aboriginal Business Canada
- **Murray Jackson**, Canadian Tourism Commission
- **Constance Jamieson**, First Nation Travel
- **Curtis Jonnie**, Manitoba Aboriginal Tourism Association
- **Racelle Kooy**, Aboriginal Tourism Team Canada
- **Richard Lafferty**, Northwest Territories Arctic Tourism
- **Virginia Mackenzie**, Bear Island
- **Don Morin**, Yellowknife

- **Nancy Nightingale**, Knot-La-Cha Coast Salish Handicrafts
- **Debbie Parent**, Yukon First Nations Tourism Association
- **Jan Porter**, Aboriginal Tourism Association of Southern Ontario
- **Bill Rogoza**, Northern Ontario Native Tourism Association
- **Wendy Swedlove**, Canadian Tourism Human Resources Council
- **Rosa Walker**, National Aboriginal Economic Development Board
- **Bob Weaver**, Parks Canada
- **Sandra White**, Urban Native Indian Education Society

Appendix C: Interview Guide and Survey Questionnaire

Interview Guide

A. Questions for ATTC Board Members and Government Partners

1. Do the key strategic directions of ATTC address the needs of Aboriginal tourism operators and organizations? *[ATTC key strategic directions are to: (i) support industry development, (ii) increase community awareness and capacity development, (iii) assist industry marketing, (iv) support human resource development, and (v) ensure effective communications.]*
2. Has ATTC clearly articulated the needs of the Aboriginal tourism industry?
3. Is the ATTC initiative consistent with federal government and Industry Canada's (ABC's) mandate and expectations?
4. Are you satisfied with the progress of ATTC in fulfilling its mandate and key strategic directions? If not satisfied, where has it fallen short?
Probe for satisfaction/dissatisfaction, and gaps, based on the following management effectiveness and program delivery areas:
 - *partnerships with other government departments/agencies (local, provincial, federal)*
 - *partnerships with Aboriginal groups*
 - *project activities*
 - *timing and progress of ATTC initiatives*
 - *clarity of directions*
 - *leadership*
 - *business plan/model of ATTC (i.e., structure and design, value-for-money)*
 - *contribution of board of directors*
 - *scope and representation*
 - *funding from other sources (i.e., other than ABC) for core operations and project activities*
 - *fulfillment of work items in ATTC contract ("accountability accord") with ABC (namely, development of a National Aboriginal Tourism Strategy, Checklist for Success series, Annual National Tourism Conference, State of the Aboriginal Tourism Industry study, national inventory of Aboriginal businesses).*
5. *Role of ATTC:* What role should ATTC play in promoting Aboriginal tourism in Canada? For example: should ATTC be more proactive in promoting Aboriginal tourism and in facilitating the development of related products and services? Should ATTC play an advocacy role, and is this sufficient to address the needs of tourism operators? *[Probe for other views about what the role of ATTC should be.]*
6. Please briefly describe what in your view have been key successes/accomplishments of ATTC over the past three years?
Probe for successes/accomplishments related to the following areas:

- *industry development accomplishments*
 - *community awareness and capacity development*
 - *partnership building*
 - *marketing and communications*
 - *human resources development.*
7. Is ATTC likely to achieve its objectives? [*Base answer on past performance of ATTC (3-years), and on work items in its current operations plan—see items in “accountability accord” listed above in Question 4.*]
 8. Is the current delivery and organizational structure of ATTC appropriate to ensure accessibility and optimum reach of ATTC programs and services? If not, how would you change it, to make it more effective?
 9. Is ATTC self-sustainable – i.e., with reduced government funding? If not, what other resources or actions are required (e.g., membership dues, sponsorships, conference fees, partnership financial contributions)?
 10. What are the relationships between ATTC and other federal government departments/agencies involved in tourism-related activities (e.g., the Canadian Tourism Commission)? How could these relationships be strengthened to improve the sustainability of ATTC and the delivery of its services?
 11. What are the challenges ahead for ATTC in fulfilling its mandate and key directions?
Probe for challenges on the following program effectiveness and delivery areas:
 - *funding and staffing*
 - *recognition/credibility*
 - *partnerships at all levels (local, provincial, and federal)*
 - *operations planning and capacity development of ATTC*
 - *capacity development of RATAs*
 - *participation of Aboriginal tourism business operators*
 - *promoting the Aboriginal tourism product/service.*
 12. What other external or internal factors have facilitated or impeded development and/or service delivery by ATTC?
 13. Are the proper operations, financial and management controls in place to report on the activities, results and impacts of ATTC operations (e.g., quarterly reports, benchmarks and performance indicators)? Are you satisfied with the way in which ATTC reports on its activities and accomplishments?
 14. Do you have any other observations/comments or concerns about ATTC that you would like to see included in this Review study?

B. Questions for Regional Aboriginal Tourism Associations

1. Please briefly describe your organization and the services it provides to the tourism industry sector in your region? *[Probe for types of services offered, size of organization, scope of operations in region, partnerships established, and relationships with tourism operators.]*
2. Is ATTC providing you with necessary tools, skills, contacts and resources needed to promote a viable tourism business in your region?
Probe for relevant ATTC accomplishments and/or gaps in fulfilling regional needs of this RATA, particularly with respect to the following areas:
 - *human resources development (e.g., workshops, training)*
 - *promotional activities and information dissemination (e.g., trade shows, newsletters, data repository and networking opportunities)*
 - *marketing and communications (e.g., web site, conferences, media and public relations strategy).*
3. Have ATTC project initiatives and operations improved awareness about Aboriginal tourism products/services in your region? If so, could you describe how by providing an example?
4. Has ATTC helped create economic development opportunities through partnerships and local community initiatives in your region? If so, could you describe how by providing an example?
5. To what extent does your organization depend on ATTC support? Is your organization sustainable without support from ATTC?
6. Are you receiving assistance from other government programs/initiatives? Do these other programs/initiatives complement or duplicate the ATTC contribution?
7. Has ATTC helped you leverage your core funding to attract additional support from other public or private organizations – either in-kind or in financial contributions? Please identify the dollar value of additional support from other organizations.
8. Are you satisfied with the way in which ATTC delivers its services/initiatives?
Probe for satisfaction/dissatisfaction, and gaps, based on the following program/service delivery areas:
 - *partnerships with other government departments/agencies*
 - *partnerships with Aboriginal groups/organizations*
 - *project activities*
 - *timing and progress of ATTC initiatives*
 - *clarity of directions*
 - *leadership*
 - *strategic planning and information about tourism industry and related opportunities*

- *funding*
 - *capacity development.*
9. Please describe how ATTC has helped to increase your capability as a regional tourism association. Has ATTC helped you to better assist the tourism industry in your region? If so, how?
 10. If not, what should ATTC do to improve its effectiveness and delivery of its services to RTAs?
 11. What other factors have facilitated or impeded the development and/or service delivery of your RTA organization?
 12. Do you have any other observations/comments or concerns about ATTC that you would like to see included in this Review study?

C. Questions for Aboriginal Tourism Operators Telephone Survey

1. Are you aware of the Aboriginal Tourism Team Canada organization [*and/or relevant Regional Aboriginal Tourism Association*]? If yes, continue with following questions. [*If no, probe for contact person within the organization who might be aware of ATTC and/or relevant RATA to respond to questions.*]
2. Please briefly describe your organization and the services it provides to the tourism industry in your region. [*Probe for general business and demographic characteristics of tourism operator, including specific service sector, size of organization, domestic and international tourists served, and products and services offered.*]
3. Are ATTC and/or [*relevant*] RTA providing you with necessary assistance (e.g., information tools, skills development, contacts and resources, networking events, and identification of business opportunities) needed to develop and promote your aboriginal tourism products?
Probe for relevant ATTC and/or relevant RTA contributions, particularly with respect to the following areas:
 - *human resources development (e.g., workshops, training)*
 - *promotional activities and information dissemination (e.g., trade shows, newsletters, data repository and networking opportunities)*
 - *communications (e.g., web site, conferences, media and public relations strategy).*
4. Have ATTC and/or [*relevant*] RTA project initiatives and services improved awareness of, and helped market, your Aboriginal tourism products domestically and internationally? If so, could you describe how?
5. To what extent would you attribute the success of your organization to the assistance provided by ATTC and/or relevant RTA? [*Please probe for comments and provide a*

response based on a 1 to 5 scale, where “1” means “success not at all attributable to ATTC/RTA” and “5” means “success is totally attributable to ATTC/RTA”.]

6. Are you satisfied with the way in which ATTC and/or *[relevant]* RTA delivers its services/initiatives in your region?

Probe for satisfaction/dissatisfaction, and gaps, based on the following program/service delivery areas:

- *market research and opportunities*
- *industry showcases and trade shows*
- *trade missions*
- *promotional materials and events*
- *media strategy and public relations*
- *educational resources*
- *networking.*

[Please probe for comments related to above services, and provide an overall satisfaction response based on a 1 to 5 scale, where “1” means “not at all satisfied” and “5” means “very satisfied”.]

7. What would you suggest ATTC and/or *[relevant]* RTA do to improve their services, to better address your needs in developing and promoting tourism in your region? *[Probe for specific suggestions.]*
8. Do you have any other observations/comments or concerns about ATTC and/or *[relevant]* RTA that you would like to see included in this Review study?

D. Questions for Aboriginal Business Canada (HQ and Regions)

1. Do the key strategic directions of ATTC address the needs of Aboriginal tourism operators and organizations? *[ATTC key strategic directions are to: (i) support industry development, (ii) increase community awareness and capacity development, (iii) assist industry marketing, (iv) support human resource development, and (v) ensure effective communications.]*
2. Has ATTC clearly articulated the needs of the Aboriginal tourism industry?
3. Is the ATTC initiative consistent with federal government and Industry Canada’s (ABC’s) mandate and expectations?
4. Are you satisfied with the progress of ATTC in fulfilling its mandate and key strategic directions? If not satisfied, where has it fallen short?
Probe for satisfaction/dissatisfaction, and gaps, based on the following management effectiveness and program delivery areas:
- *partnerships with other government departments/agencies (local, provincial, federal)*
 - *partnerships with Aboriginal groups*

- *project activities*
 - *timing and progress of ATTC initiatives*
 - *clarity of directions*
 - *leadership*
 - *business plan/model of ATTC (i.e., structure and design, value-for-money)*
 - *contribution of board of directors*
 - *scope and representation*
 - *funding from other sources (i.e., other than ABC) for core operations and project activities*
 - *fulfillment of work items in ATTC contract (“accountability accord”) with ABC (namely, development of a National Aboriginal Tourism Strategy, Checklist for Success series, Annual National Tourism Conference, State of the Aboriginal Tourism Industry study, national inventory of Aboriginal businesses).*
5. *Role of ATTC:* What role should ATTC play in promoting Aboriginal tourism in Canada? For example: should ATTC be more proactive in promoting Aboriginal tourism and in facilitating the development of related products and services? Should ATTC play an advocacy role, and is this sufficient to address the needs of tourism operators? [*Probe for other views about what the role of ATTC should be.*]
6. Please briefly describe what in your view have been key successes/accomplishments of ATTC over the past three years?
Probe for successes/accomplishments related to the following areas:
- *industry development accomplishments*
 - *community awareness and capacity development*
 - *partnership building*
 - *marketing and communications*
 - *human resources development.*
7. Is ATTC likely to achieve its objectives? [*Base answer on past performance of ATTC (3-years), and on work items in its current operations plan—see items in “accountability accord” listed above in Question 4.*]
8. Is the current delivery and organizational structure of ATTC appropriate to ensure accessibility and optimum reach of ATTC programs and services? If not, how would you change it, to make it more effective?
9. Is ATTC self-sustainable – i.e., with reduced government funding? If not, what other resources or actions are required (e.g., membership dues, sponsorships, conference fees, partnership financial contributions)?
10. What are the relationships between ATTC and other federal government departments/agencies involved in tourism-related activities (e.g., the Canadian Tourism Commission)? How could these relationships be strengthened to improve the sustainability of ATTC and the delivery of its services?

11. What are the challenges ahead for ATTC in fulfilling its mandate and key directions?
Probe for challenges on the following program effectiveness and delivery areas:
- *funding and staffing*
 - *recognition/credibility*
 - *partnerships at all levels (local, provincial, and federal)*
 - *operations planning and capacity development of ATTC*
 - *capacity development of RATAs*
 - *participation of Aboriginal tourism business operators*
 - *promoting the Aboriginal tourism product/service.*
12. What other external or internal factors have facilitated or impeded development and/or service delivery by ATTC?
13. Are the proper operations, financial and management controls in place to report on the activities, results and impacts of ATTC operations (e.g., quarterly reports, benchmarks and performance indicators)? Are you satisfied with the way in which ATTC reports on its activities and accomplishments?
14. Do you have any other observations/comments or concerns about ATTC that you would like to see included in this Review study?

Appendix D: Survey Worksheet and Questionnaire

Worksheet and Questionnaire for Aboriginal Tourism Operators Telephone Survey

A. INTERVIEWER CONTROL SECTION

Contact name:	Phone:
	Fax:
Organization:	E-mail:
	Website:
1 st call (date/result):	Unique Number:
2 nd call (date/result):	
3 rd call (date/result):	
Follow up:	
Comments:	

B. INTERVIEWER INSTRUCTIONS

Statement of introduction:

- Include greetings, your name, your organization, study title and its purpose, and the client who commissioned the study. *[Insert statement.]*
- Make reference to ABC letter of introduction, and voluntary nature and confidentiality of the interview.
- Verify contact information, and the organization's involvement in Aboriginal tourism-related services/products/activities.
- Verify that the interviewee is the owner or manager of the organization.

Record results of introduction:

Corrections to verified information:	<i>[Insert]</i>
If interview abandoned, include reason(s):	<i>Reason(s)</i>
Other comments/observations:	

C. QUESTIONS

1. Are you aware of the Aboriginal Tourism Team Canada organization and/or ...
[identify relevant Regional Aboriginal Tourism Association(s) from RATA list]?

[If “yes” to either ATTC or RATA, continue with question 2. If “no”, probe for contact person within the organization who might be aware of ATTC and/or relevant RATA to respond to questions below. Or abandon interview, if contact (or other person in the organization) is unable to answer questions.]

Interviewer notes:

2. Please briefly describe your organization and the tourism services it provides in your region.

[Probe for general business and demographic characteristics of tourism operator, including specific service sector, size of organization, products and services offered, domestic and international tourists served.]

Service sector:	
Size of organization (# of staff):	
Products/services offered:	<i>Summer:</i> <i>Winter:</i>
Domestic tourism:	
International tourism:	
Other related business characteristics:	

3. To what extent are ATTC and/or *[identify relevant RATA]* providing you with assistance needed to develop and promote your aboriginal tourism services/products?

[Probe for reactions to ATTC and/or relevant RATA contributions, particularly related to the following areas:

1. *human resources development (e.g., workshops, training)*
2. *promotional activities, marketing and information dissemination (e.g., trade shows, newsletters, data repository and networking opportunities)*

3. *communications (e.g., web site, conferences, media and public relations strategy).*]

	RESPONSE <i>[Identify whether related to ATTC and/or RATA]</i>
<i>Interviewer notes:</i> <i>(a) Summarize reactions to relevant human resources development activities</i>	
<i>Interviewer notes:</i> <i>(b) Summarize reactions to relevant promotional activities, marketing and information dissemination</i>	
<i>Interviewer notes:</i> <i>(c) Summarize reactions to relevant communications activities</i>	

4. (a) Are you aware of any ATTC and/or *[relevant RATA]* projects/activities *[prompt: e.g., “paint the plane” project, ..., other]*?

(b) If “yes” would you say that this (these) project(s) helped improve awareness of, and/or helped promote/market tourism in your region?

(c) If “yes”, could you describe any specific benefits of this (these) project(s) (e.g., increased international/U.S./Canadian tourists to our region, helped build our capacity as a tourist organization, ...)?

	Summarize responses to (a), (b), and (c)
(a)	
(b)	
(c)	

5. To what extent would you attribute successes of your organization to activities/ services provided by ATTC and/or by *[identify relevant RATA]*?

[Probe for comments and provide a response based on a 1 to 5 scale, where “1” means “successes not at all attributable to ATTC/RATA”, “3” means some success can be

attributed to ATTC/RATA activities/services”, “5” means “successes totally attributable to ATTC/RATA activities/services”.]

Interviewer notes	Summarize interviewee comments	Insert 1 to 5 response
Identify whether ATTC and/or RATA -----		

6. Are you satisfied with the services/activities provided by ATTC and/or *[insert relevant RATA]* in your region?

[Probe for comments related to noted areas below, to the extent possible, and provide an overall response based on 1 to 5 scale, where “1” means “not at all satisfied”, “3” means “somewhat satisfied” and “5” means “very satisfied”.]

- *market research, identification of business opportunities*
- *industry showcases, trade shows, trade missions*
- *promotional activities and networking events*
- *media strategy and public relations*
- *educational resources.*

Interviewer notes	Summarize interviewee comments	Insert 1 to 5 response
Identify whether ATTC and/or RATA: -----		

7. What would you suggest ATTC and/or *[insert relevant RATA]* do to help in developing and promoting tourism in your region? *[Probe for any specific suggestions.]*

Summarize response

