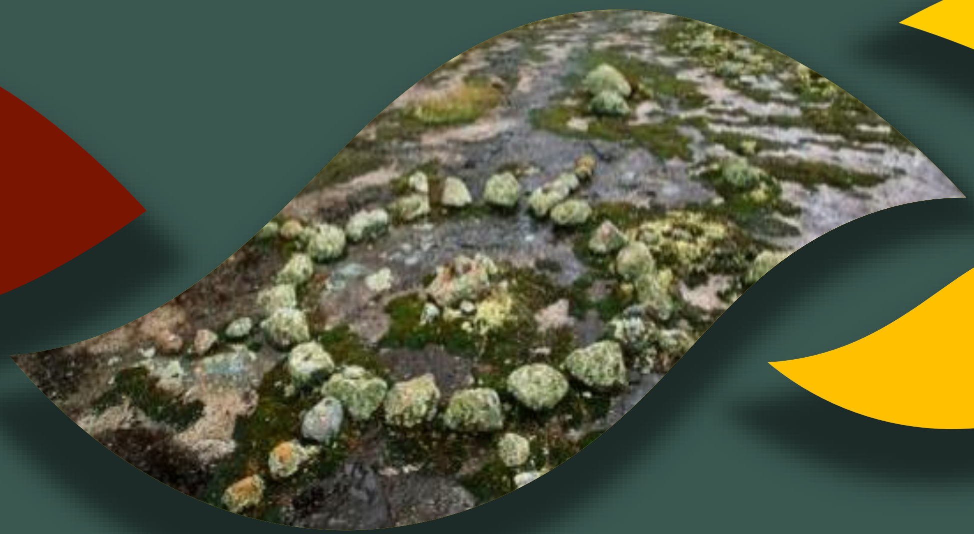

MANITOBA'S INDIGENOUS TOURISM INDUSTRY: A SNAPSHOT

MAY, 2018

INDIGENOUS
TOURISM ASSOCIATION OF CANADA

PROBE RESEARCH INC.

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METHODOLOGY

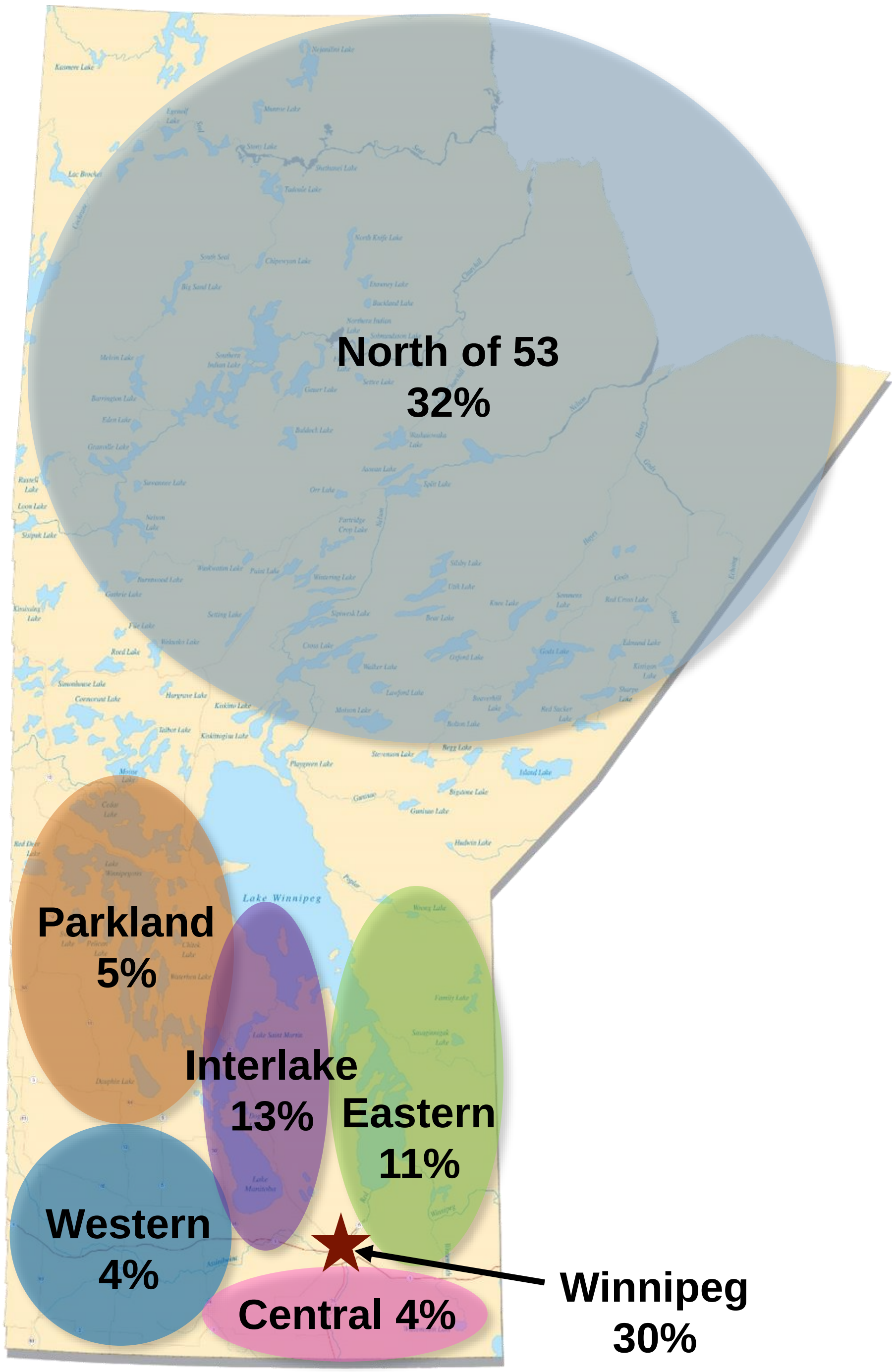
In March 2018, the Indigenous Tourism Association of Canada engaged Probe Research Inc. to conduct a two-phase research project to better understand the breadth of the Indigenous tourism industry in Manitoba and its recent growth patterns, potential and needs. Of specific interest was the level of market and export readiness among Manitoba operators.

Building on industry data already gathered by ITAC, Probe Research completed an inventory of Indigenous tourism operators – that is to say, tourism ventures majority-owned by First Nations, Métis or Inuit people. The inventory includes complete contact information for 56 tourism operators, details on ownership and business focus as well as a preliminary assessment of market readiness.

The second phase involved depth interviews with 13 operators in April and May, 2018. A questionnaire was developed in collaboration with ITAC to gather insights into recent growth and visitation patterns, expectations for the future, barriers to market expansion and views of the Indigenous tourism industry in general and supports needed from ITAC and Travel Manitoba.

INDUSTRY OVERVIEW

LOCATION OF INDIGENOUS TOURISM OPERATORS



INDIGENOUS TOURISM SECTOR TYPES

Culture
Historical attractions, art and museums, classes, informal learning opportunities

Accommodation
Lodges, hotels and cabins

BAY RIVER INN & SUITES

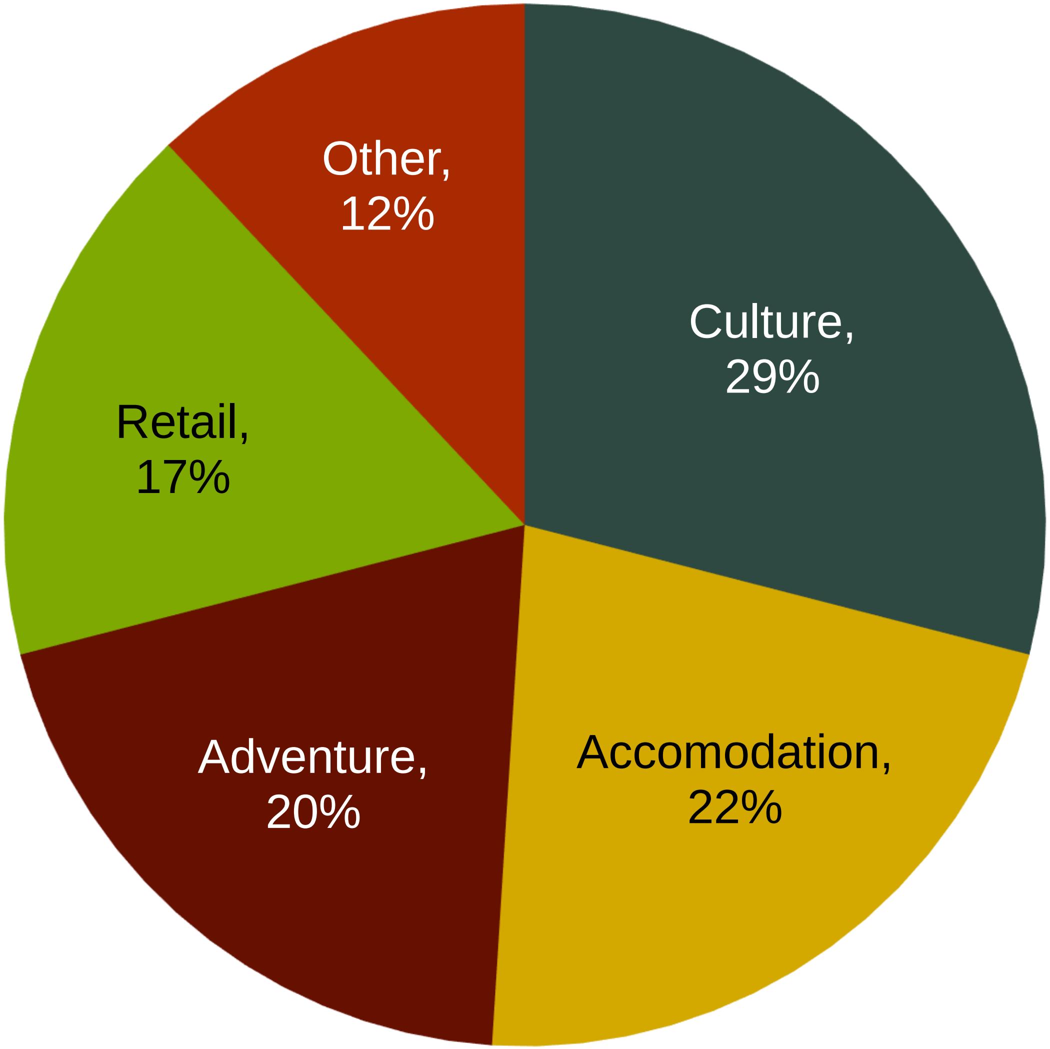
Adventure
Fishing, hunting, dog sledding, mountain bike tours

WAPUSK ADVENTURES

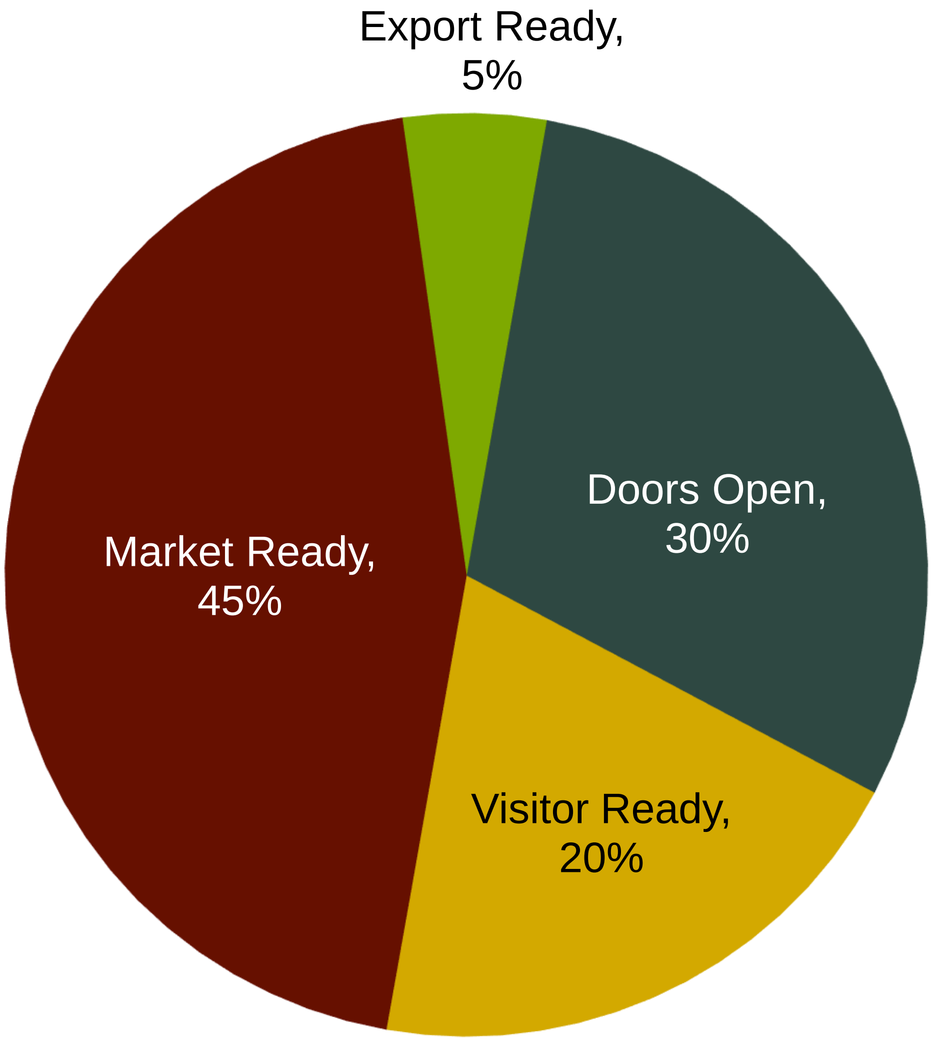
Retail
Boutiques and galleries

Teekca's Aboriginal Boutique

OPERATORS WORK IN MULTIPLE AND OVERLAPPING SECTORS



LEVELS OF MARKET READINESS AMONG INDIGENOUS TOURISM OPERATORS



INDUSTRY ASSESSMENT

STATE OF THE INDUSTRY

- There is a general view that Indigenous tourism in Manitoba is growing, but there is some disagreement on how quickly. Some respondents felt it is thriving in Manitoba, whereas others felt it was “under the radar” or expanding too slowly. Two participants suggested there is some urgency to establishing an Indigenous-led industry before non-Indigenous people do.
- There was strong consensus that Indigenous tourism has significantly more room to grow. Large, exclusive markets exist abroad, particularly for authentic educational, outdoor and healing experiences. And tourism represents an attractive option for First Nations and Métis entrepreneurs. Said one operator, “They say this is the fastest-growing industry and we want to be part of it.”
- However, there was a view that other Western provinces were “ahead of the game” – that their industries received more support, engaged in more effective marketing and had either a more well-defined product, or one or two significant attractions to anchor the Indigenous tourism industry. (Two noted Pimachiowin Aki could be such an anchor in Manitoba and one suggested an educational centre at the Bannock Point petroforms.)

WHAT SETS MANITOBA APART?

- **The diversity of Indigenous Peoples in Manitoba.** The variety and uniqueness of cultures – Métis, Dene, Dakota, Cree, Anishinaabe and others – provides many different opportunities to incorporate Indigenous culture into tourism experiences.

- **Pimachiowin Aki.** An opportunity to educate Canadians and other visitors about treaties, traditions and conservation in a unique intact boreal forest.

- **Resilient Indigenous culture.** Each community has unique and vibrant traditions that persist. For example, powwows do not exist for tourists but for First Nations people, almost exclusively. Anishinaabemowin and Nehiyawemowin are still spoken in many communities. Drumming and singing performances are common.

- **The industry's role as protectors of the land.** Several respondents working in outdoor or land-based businesses noted the dual responsibly of welcoming and educating tourists while also conserving traditional territories and land, particularly in the North and on the East Side.

- **A strong urban Indigenous population** at a moment of significant political activism, artistic growth and national attention.

DOWNSIDES TO AN INDIGENOUS TOURISM INDUSTRY?

- Most respondents could think of few risks or downsides to a growing Indigenous tourism industry as long as it is lead by Indigenous people and of direct benefit to communities.
- However, there was significant discussion about preserving the authenticity of Indigenous experiences. One participant recalled past “teepee camps” in the late 1990s that catered to European tourists. These camps were not considered particularly authentic. Another respondent raised similar concerns about “faux” First Nations crafts being sold in stores that are not made in Canada.
- One operator in the Churchill region noted the danger, though far in the future, of growing too big. “I don’t want to become a Whistler, when the Olympics was there,” he said. This concern was echoed by another respondent working on the East Side who said the pace of growth must be slow and managed by the community itself. “We don’t want to be overrun.”
- In addition, several participants noted the tension between commercializing or exploiting traditional practices and ensuring Indigenous people, particularly elders, are not exploited or left uncompensated for their contributions.

INDIGENOUS EXPERIENCES

Operators felt they generally offered a significant amount of Indigenous culture to visitors, either overtly as part of educational programs featuring crafts or traditional medicines, or more innately as part of adventure or outdoor activities. On a scale of one to five, with five being a great deal of indigenous culture, most respondents selected “four” or “five.”

“We always tell the customers the history and story behind the products they are purchasing.”

“Actually, I think a lot of people really want an Indigenous experience. A lot of people are intrigued with the spirituality of Indigenous people, the philosophies of how we live our lives.”

The nature of Indigenous experiences offered included: teepees, classes in crafts such as beading and quill work, trapline tours, talks on traditional land practices and cultural connections to the land and animals, spending time with elders, and offering sweat lodges and walking and bike tours of Indigenous spaces in urban areas.

“There’s Métis culture all over the place here.”

“I not only talk about the products but the area and the community. We don’t have tourist information centers anymore so I seem to have all the info to guide people where they want to go from the gallery for food or lodgings or more tourist activities. I do demonstrations right outside the gallery.”

GROWTH AND BARRIERS

VISITOR ORIGINS

- Most respondents, particularly those in Winnipeg, said most visitors are local, with a small percentage, perhaps 10 to 15 per cent, being foreign tourists.

- Several more remote hunting and fishing lodges said their visitors tend to be evenly split between Americans and Manitobans. One noted this was an ideal mix. It is notable that, among operators providing accommodations, two said their major clientele are not tourists but business travellers – those working for Manitoba Hydro or the government, or who have business in the community.

- Only one, a North of 53 adventure tour operator, said his clients were predominately international – from China, Australia, Germany, Korea and the United States.

RECENT GROWTH

STAGNANT OR AT CAPACITY

- A majority of respondents felt visitorship and revenue has been somewhat stagnant over the last two years, with challenges arising attracting new customers, marketing and reaching mainstream travellers. “I’m not where I wanted to be by now when I started this business,” said one.

- A smaller minority felt business has grown in recent years, thanks in part to word of mouth and more stable leadership. One relatively new day tour operator reported doubling the number of tour participants in a year. He’s “getting bookings already like crazy” and feels he’s at peak capacity.

- A well-established operator in Churchill noted the year-old break in rail service to the community has had a jarring effect. Overall visitorship numbers are down, especially among school tours and summer visitors. However, visits by higher-end clients who can fly into Churchill have increased, allowing for stable revenue this year. This same operator said his growth has reached “the sweet spot” in recent years and he was operating at an optimal level.

GROWTH FORECAST

MOST HOPEFUL FOR GROWTH

- A majority spoke with confidence about their ability to grow in the coming years. Almost no operators had defined revenue or visitorship goals for the next two years, though one retailer expressed a broad wish to grow by 50 per cent.

- Several respondents, particularly those with more advanced levels of market readiness, felt they were currently operating at peak capacity and had little ability to expand. In addition, some of these operators said they were comfortable with their size and harboured limited interest in expanding.

- A minority, particularly gallery operators, expressed some frustration with their ability to grow, given decreased foot traffic and clients more interested in purchasing art online.

BARRIERS TO GROWTH

A lack of small business and marketing skills: Marketing was cited as the most significant barrier to growth and is explored in detail in the next pages. In addition, one operator noted he learned many of the accounting, human resource, tax and operational skills on the job, including navigating start-up funding available. “You have to learn the hard way. You can have a good idea and just get lost.”

A need for in-community hospitality training: Education and advanced training for community members in the hospitality and hotel management industries are needed. This includes smaller-scale needs such as boat safety training for guides.

Access to elders: Younger tourism entrepreneurs reported trouble accessing traditional knowledge and advice from elders to ensure their cultural and historical information was accurate and complete.

Stereotypes: Overcoming concerns that communities are unsafe, First Nations lodges may be run-down, tours may be unreliable.

Support getting through the off season: Seasonal business operators require, in some cases, a secondary source of income.

BARRIERS TO GROWTH

LIMITED MARKETING CAPACITY, METHODS AND PLANS

- A large majority of respondents had no employee dedicated to marketing – even one working part-time. In many cases, the owners themselves look after the limited marketing underway.

- Similarly, no operators interviewed had well-defined marketing plans, for domestic or international clients. A small number of respondents had what they called informal marketing approaches, which included Facebook and website posting and perhaps a brochure or a presence at events such as Manito Ahbee. Several mentioned word of mouth as their most effective marketing.

- One export-ready operator noted nearly of his marketing is done by tour partners, which works very well since marketing directly to international clients himself would be a significant workload. However, another operator noted his foray into international marketing and tour partnerships has been less successful.

MARKETING

SUGGESTIONS FOR IMPROVEMENT

- There was generally a strong feeling among operators, particularly those with less advanced levels of market readiness, that broader and more effective marketing was needed. One Winnipeg operator noted the Indigenous community is “new to this” and marketing know-how is key to growth.
- Asked what marketing support may be useful, operators suggested a variety of relatively small-scale and practical ideas related to online marketing. These include website development and management, especially to reach non-local markets, as well as social media training. One suggested a marketing mentor approach, where businesses could get an assessment and hands-on help creating a plan.
- More broadly, operators would like more support from Travel Manitoba and a more co-ordinated focus on Indigenous culture as a unique tourism draw. “Look at B.C.,” said one operator. “They are marketing geniuses.”

LINGERING QUESTIONS

? Specific data on annual revenues over time, staffing levels and visitation rates, which could aid in quantifying and tracking the impact of Indigenous tourism in Manitoba.

? Specific preferences among operators for a range of potential marketing tools and support.

? A more detailed understanding of the barriers to export readiness among those who are now market ready. Desire? Partnerships? Market research?