



Perceptions of Indigenous Tourism in Manitoba

Credit: Urban Shaman Gallery

Travel Manitoba
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Manitoba
CANADA'S HEART BEATS

PROBE
RESEARCH INC.

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Key Findings

Only **one-third** of Manitobans say they are **familiar** with authentic Indigenous experiences.



However, **52%** have actually had these types of experiences already, including learning about culture and history from Indigenous elders or guides.



Key opportunity groups include **women, parents** and **younger adults**. Outdoor adventures and nature experiences as well as the chance to stay in an Indigenous accommodation such as a tipi are particularly appealing to these groups.

The key drivers of interest in an authentic tourism experience are a **willingness to support Indigenous-owned businesses** and a **genuine desire to interact and learn from an Elder**. These are the attitudes Travel Manitoba and ITAC may wish to highlight in marketing approaches.



78% are keen to learn about Indigenous culture if it's led by an Indigenous person.



72% want to know their tourist dollars will directly benefit Indigenous communities.

Satisfaction with past authentic Indigenous tourism experiences is high

54% are very satisfied.



Net Promoter Score: **+18**

50% of Manitobans are **likely** to seek out Indigenous tourism experiences.



However, this prospect is soft – only **9%** are **very likely**.

Key barriers to Indigenous tourism are:



Knowledge – **63%** don't know where to find information about experiences.



Anxiety – **50%** are worried they might say or do the wrong thing.

(Concerns about cost and quality are not significant barriers.)

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Methodology

Research Objectives

Probe Research was retained by Travel Manitoba to conduct a survey among Manitobans regarding their awareness of authentic Indigenous tourism opportunities in the province, the drivers of interest in these experiences and any barriers to participating in these activities that may exist.

Methodology

A 10-minute (average) online survey was conducted between July 22 and August 3, 2021 with a representative sample of 800 Manitoba adults.

The survey was designed by Probe Research in close consultation with Travel Manitoba and the Manitoba office of the Indigenous Tourism Association of Canada (ITAC).

Sample

The sample was provided by Probe Research's proprietary panel and supplemented with respondents from a large-scale national panel provider.

A survey with an online panel is a sample of convenience, so no margin of error can be ascribed. However, a random and representative non-convenience sample of 800 adults would have a margin of error of ± 3.46 percentage points, 19 times out of 20.

Minor statistical weighting by age, gender and region has been applied to this sample to ensure it corresponds with the province as a whole.

Context

The context before and during data collection is important to understanding survey results.

External Context

- COVID-19 pandemic: A significant decline in cross-border and northern tourism, but also a renewed focus on a recovery based on homegrown experiences and domestic visitors.
- A larger national and province-wide discussion of Indigenous culture and reconciliation sparked by renewed attention on the genocidal legacy of Indian Residential Schools.

Internal Context

- A new Manitoba Indigenous Tourism Strategy that seeks to significantly increase the number of market and export-ready Indigenous-owned tourism businesses as well as the number of tourism jobs and revenues by 2024.
- A desire to highlight and promote authentic Indigenous experiences that are owned or led by Indigenous people (as opposed to embedded in more mainstream or colonial attractions).



Credit: Indigenous Day Live

Profile of Respondents

(Unweighted) (Weighted)	GENDER*		
	Total (N=800) (N=800) (%)	Male (n=373) (n=384) (%)	Female (n=421) (n=410) (%)
Region			
Winnipeg	60	59	61
Non Winnipeg	40	41	39
Age			
18-34	33	34	32
35-54	37	38	36
55+	29	27	32
Income			
<\$50K	20	15	24
\$50K-\$99K	45	48	41
\$100K+	35	37	35
Children in the Household			
Yes	26	25	26
Person of Colour			
Yes	14	13	14
Indigenous Identity			
Yes	9	8	9

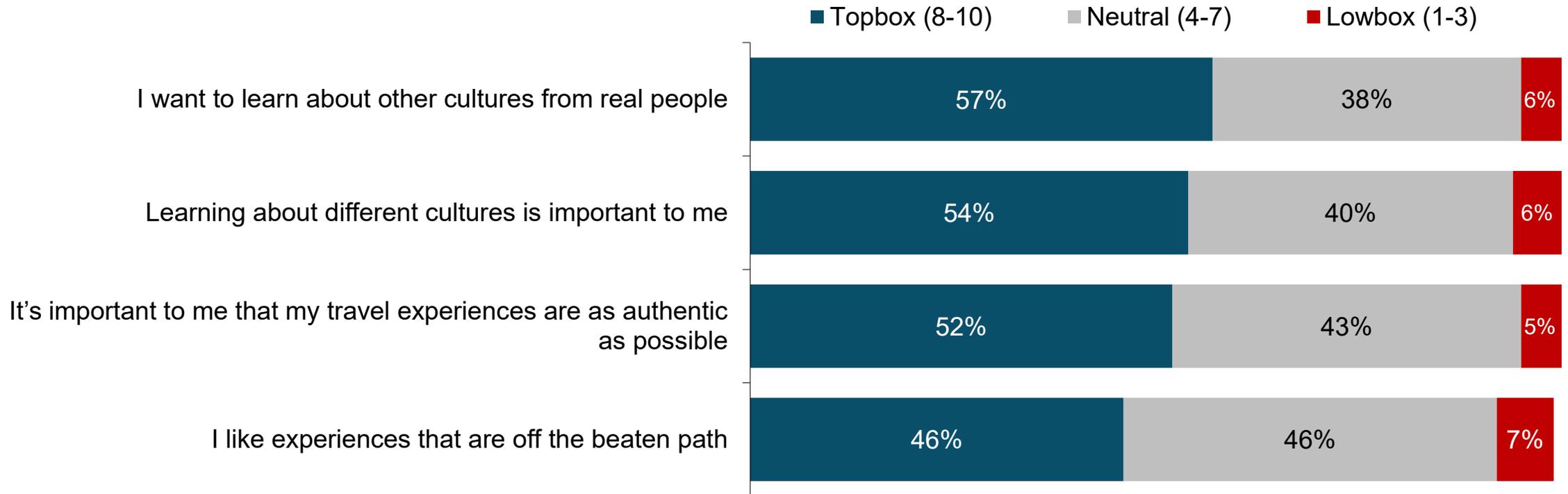
*Does not include n=6 respondents who identify as gender diverse

A group of people, likely at a festival or historical reenactment, are gathered in a snowy outdoor setting. They are holding several large flags on wooden poles. The flags include a purple flag with a white fleur-de-lis, a red flag with a white Union Jack, a red flag with a white circular emblem, and a blue flag with a white circular emblem. The people are wearing winter clothing, including hats and jackets. In the background, there is a wooden wall or fence. A blue banner with white text is overlaid on the bottom half of the image.

Broad Attitudes Towards Tourism Experiences

Broad Views on Tourism Experiences

A majority of Manitobans are very interested in authentic cultural experiences

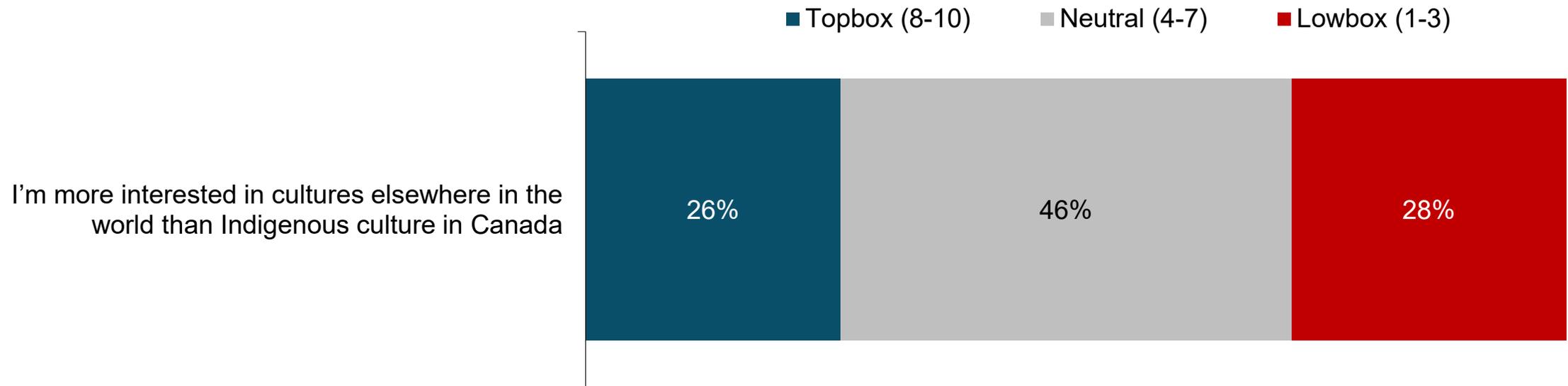


Women, those with a university degree, those who have visited a mainstream Indigenous attraction and those who have had an authentic Indigenous tourism experience are most likely to agree with these statements.

Q1. Please indicate if you agree or disagree with the following statements using a 10-point scale, where 1 means you “strongly disagree” and 10 means you “strongly agree.”

Interest in Indigenous Cultures vs. World Cultures

Manitobans tend to be more interested in other cultures rather than Indigenous cultures in Canada

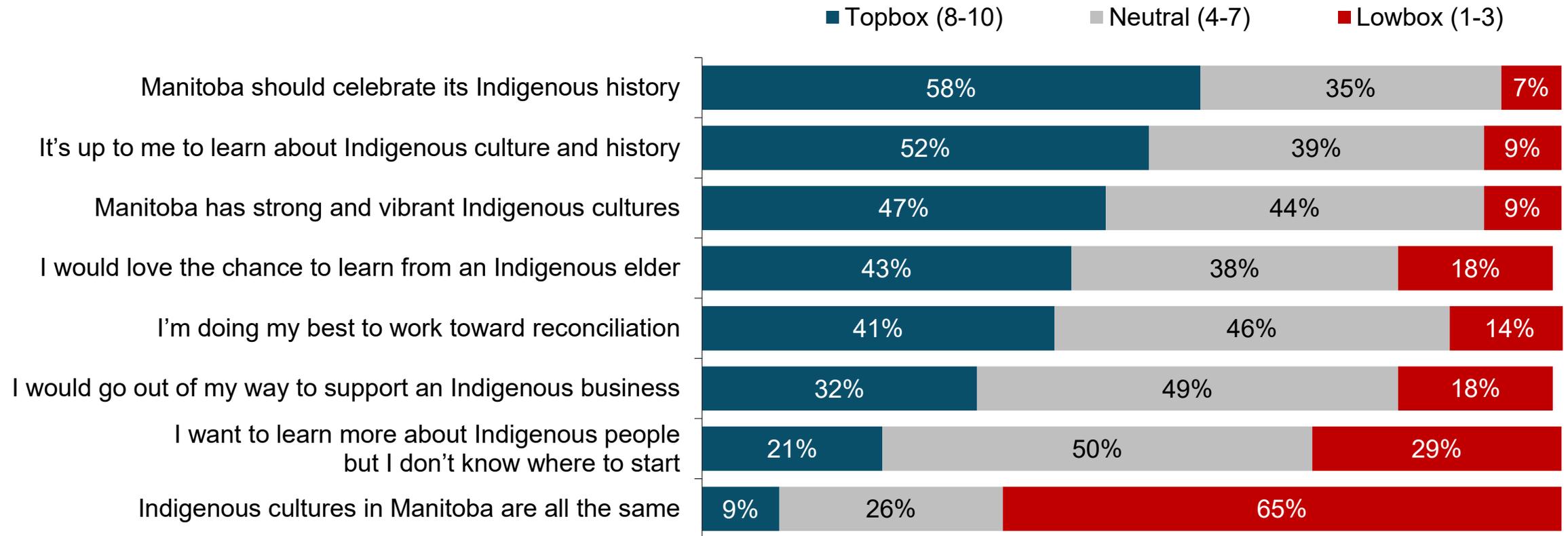


Men, those aged 18-54, those with young children at home, those who have not visited an Indigenous attraction and those who have not had an Indigenous experience are most likely to agree with this statement.

Q1. Please indicate if you agree or disagree with the following statements using a 10-point scale, where 1 means you "strongly disagree" and 10 means you "strongly agree."

Views on Indigenous Tourism Experiences

Manitobans wish to celebrate Indigenous culture, but are less likely to support a business



Overall, Winnipeggers, women, those with a university degree, BIPOC-identifying people, as well as those who have visited a mainstream Indigenous attraction or had an authentic Indigenous experience are far more likely to agree with these statements.

Q2. Again, please indicate if you agree or disagree with the following statements using a 10-point scale, where 1 means you “strongly disagree” and 10 means you “strongly agree.”

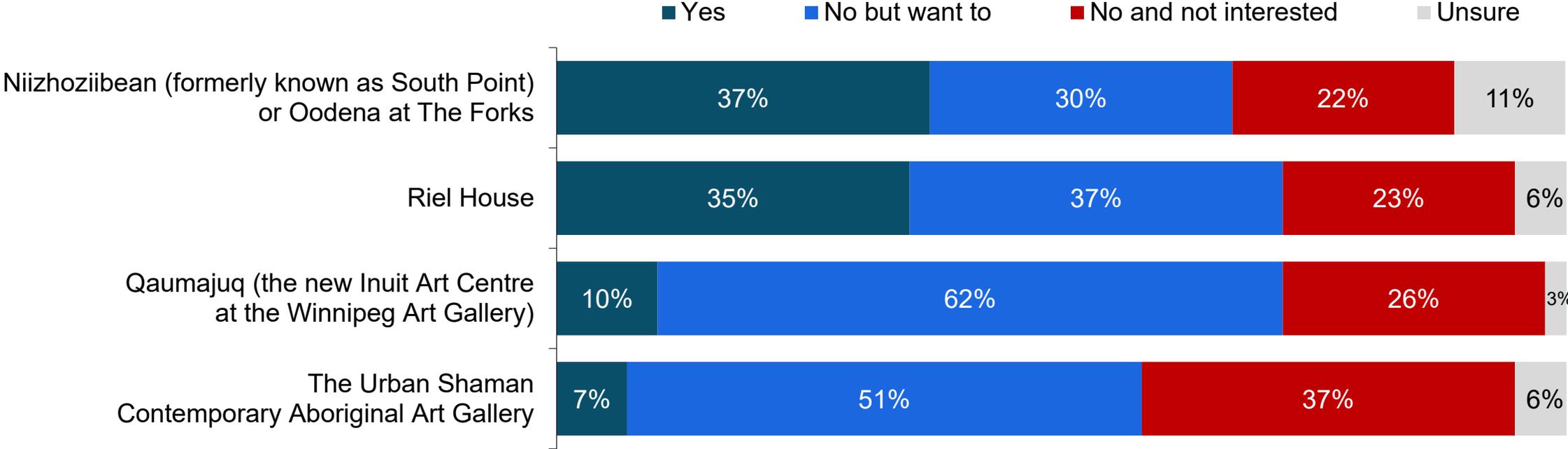
Base: All respondents (N=800)

A group of people in winter clothing are gathered in front of a wooden fence. They are holding several flags on poles. The flags include a white flag with a purple fleur-de-lis, a red flag with a white circular emblem, a blue flag with a white circular emblem, and a red flag with a white cross. The people are wearing winter hats, scarves, and jackets. The scene is outdoors in a snowy or winter environment.

Participation in Manitoba's Indigenous Tourism Attractions

Mainstream Indigenous Attractions – Visitation

Previous visitation and future interest in “gateway” attractions is high among Manitobans



Overall, 54% of Manitobans have visited at least one of these attractions.

Those living in Winnipeg, middle-aged respondents (those 35-54), those with a university degree, those from high income households (\$100K+) as well as those who have had an authentic Indigenous experience were far more likely to have visited at least one of these “gateway” attractions.

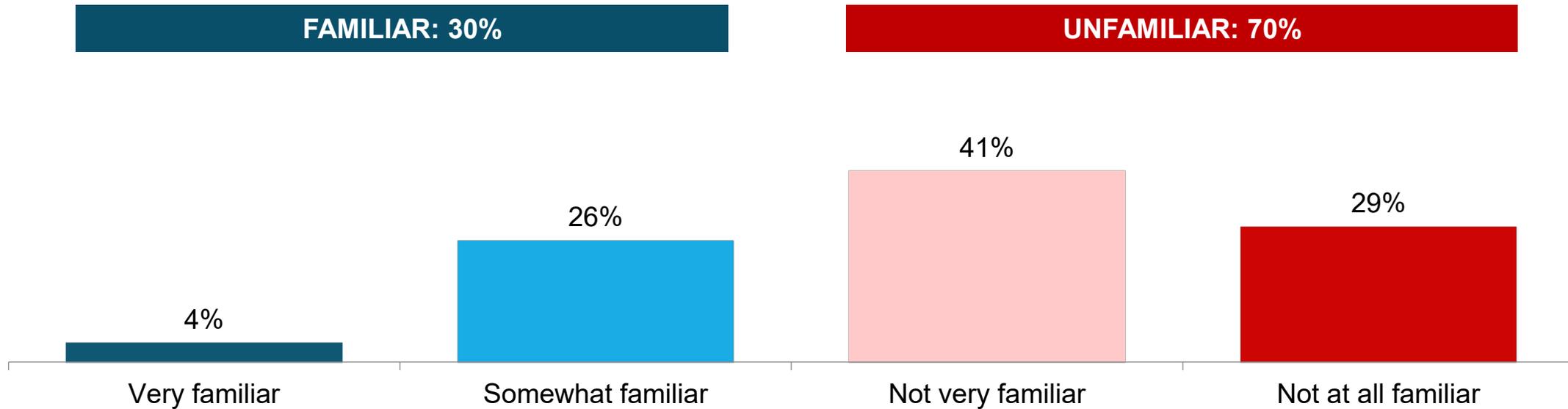
Q3. Have you ever visited any of the following tourist attractions in Manitoba?

Base: All respondents (N=800)

Familiarity with Authentic Indigenous Experiences

Experiences

Only three in ten say they are familiar with an authentic Indigenous experience



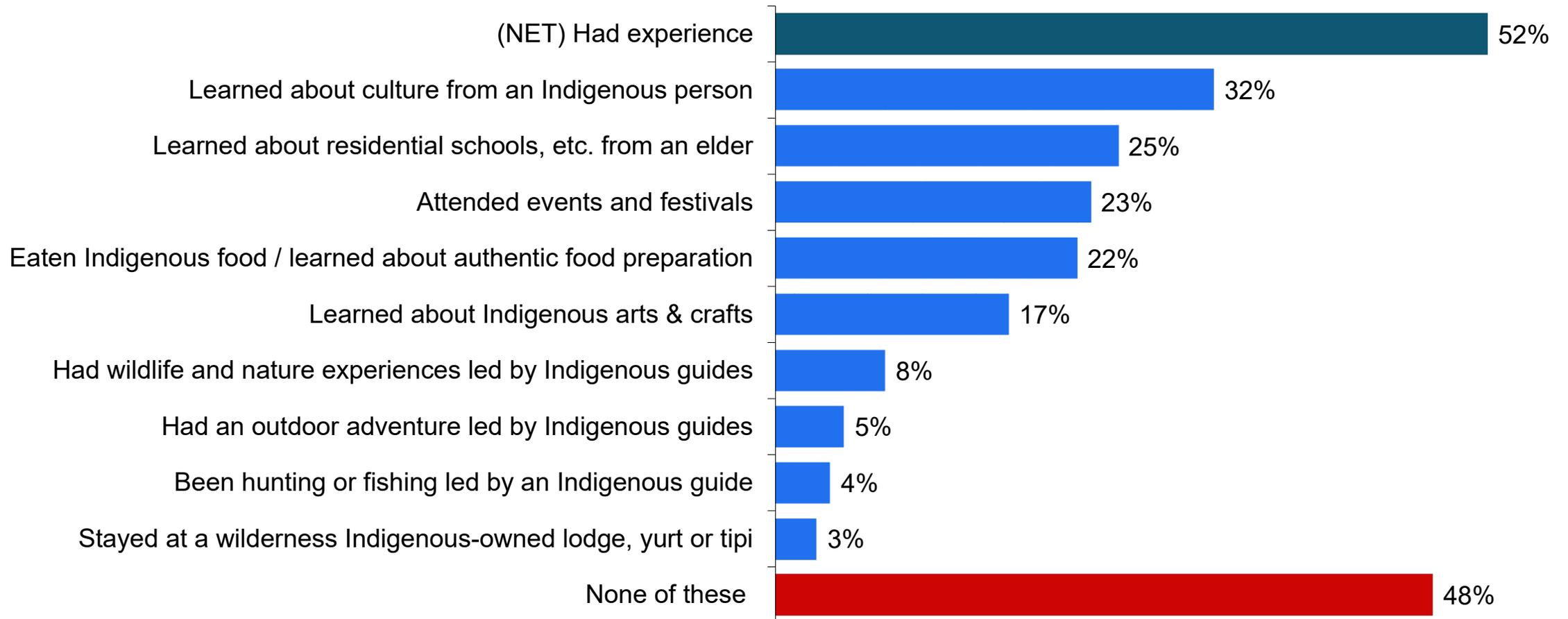
Familiarity was most evident among those who have visited a mainstream Indigenous attraction (38%) and those who have already had an authentic Indigenous experience (43%), as well as Indigenous Manitobans (50%) and people of colour (46%).

Q4. Now, we want to ask about a different kind of tourism – authentic Indigenous experiences delivered by First Nations, Inuit and Métis peoples. These would be owned and operated directly by Indigenous people and could include things like tours, hotels or lodges, events like festivals and pow-wows or spiritual experiences like a sweat lodge. Based on what you know, how familiar are you with this type of authentic Indigenous tourism in Manitoba?

Base: All respondents (N=800)

Participation in Authentic Indigenous Tourism Experiences

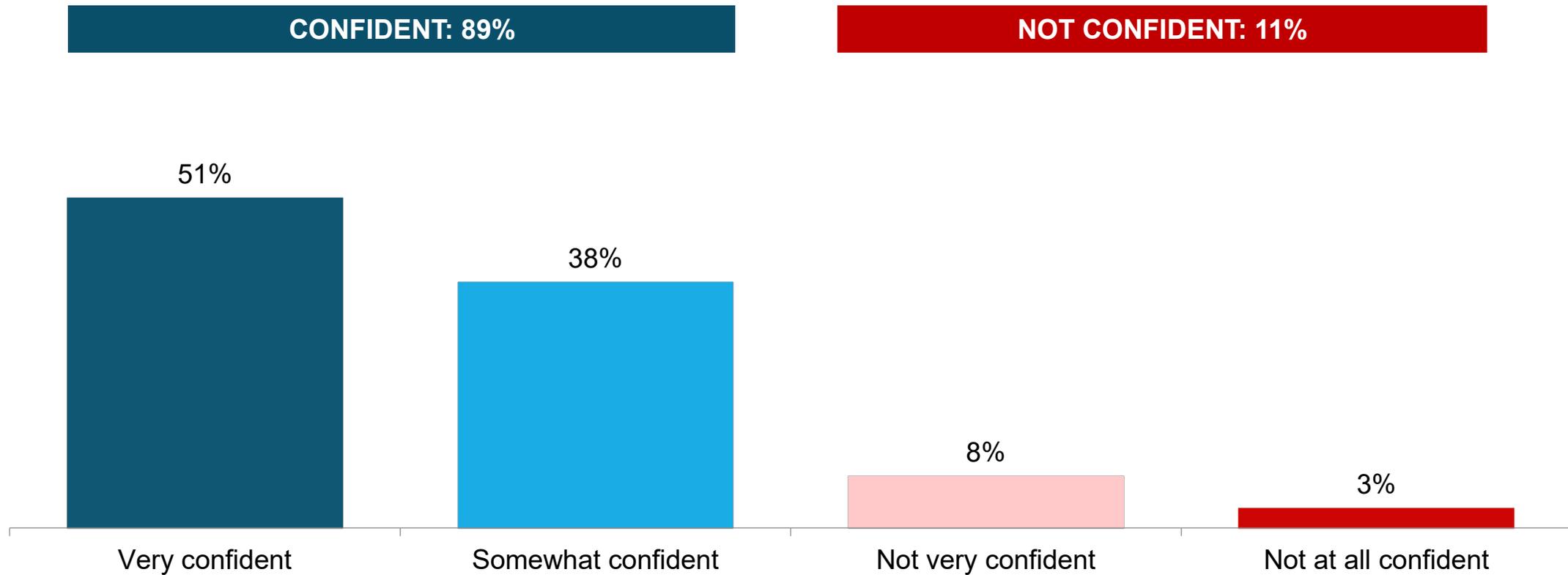
Around one-half have already had an authentic Indigenous tourism experience



Q5. Which of the following authentic Indigenous tourism experiences have you had in Manitoba in the last five years or so? Please check all that apply.

Confidence in Authenticity of Experience

Virtually all feel confident their experience was owned or led by an Indigenous person

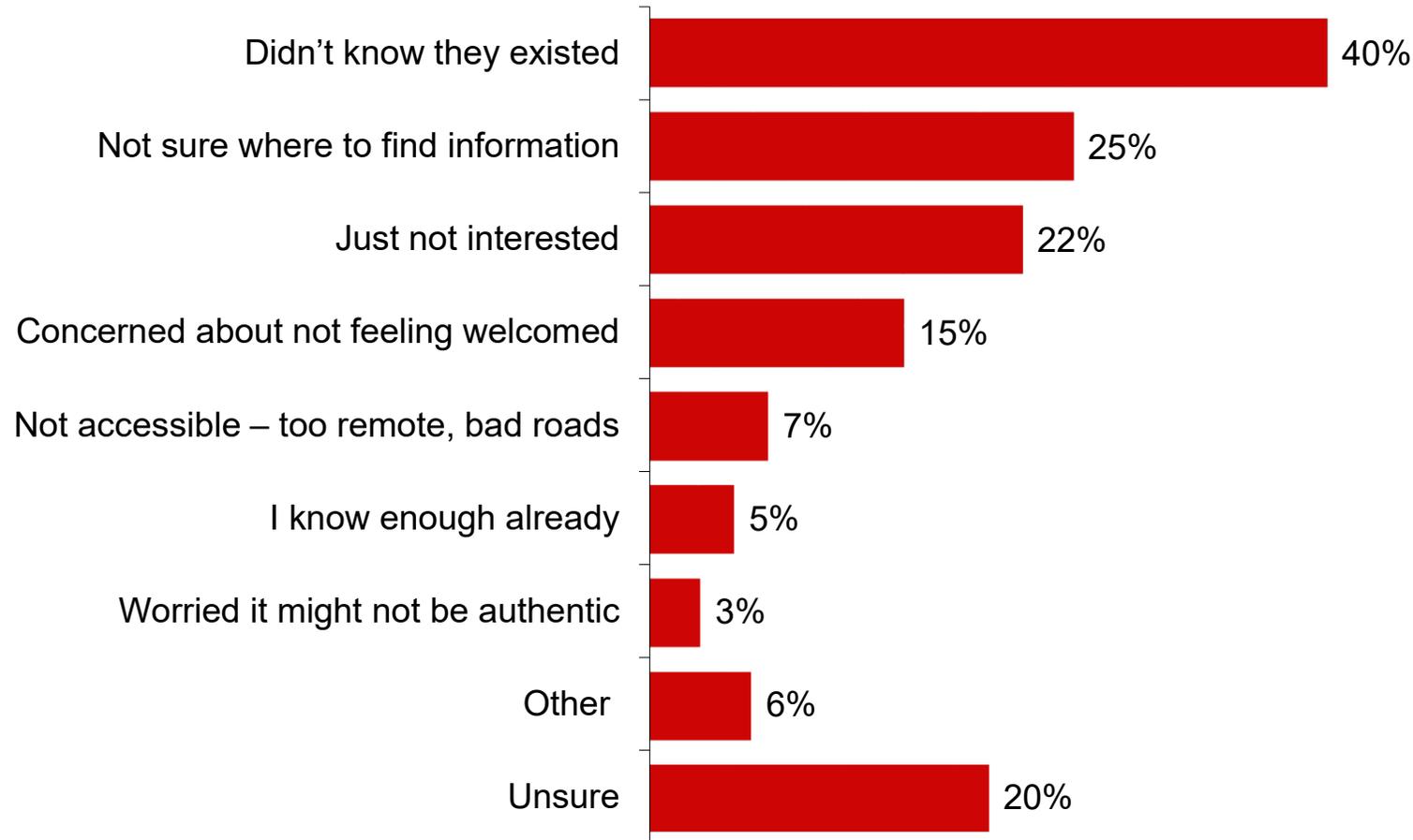


Q6. Thinking of these Indigenous tourism experiences you've had in Manitoba, how confident were you that these experiences were owned or led by Indigenous people?

Base: All respondents participating in authentic experience (n=410)

Reasons for Not Participating in Indigenous Tourism Experiences

Lack of awareness most cited reason for non-participation



Q7. Why haven't you participated in any of these Indigenous tourism experiences in the past five years? Please check all that apply.

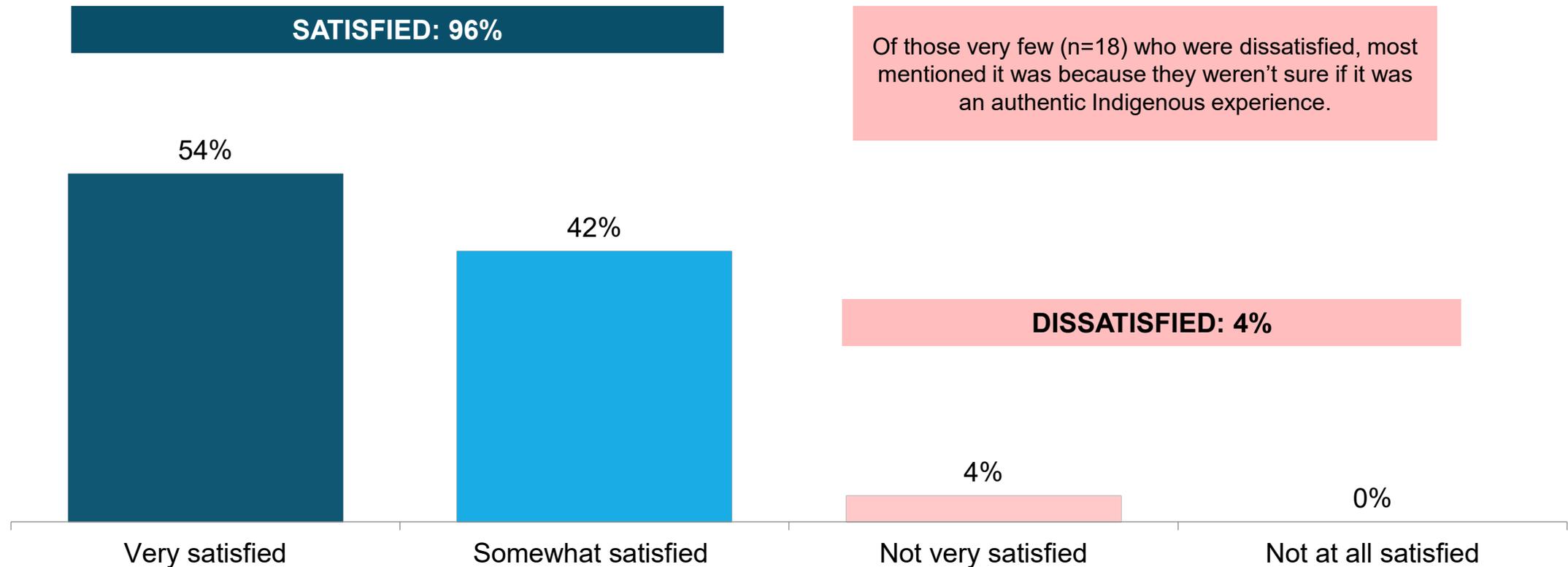
Base: Those who have never participated in an authentic experience (n=381)

A group of people dressed in winter attire are gathered in front of a wooden wall. Several individuals are holding large flags on poles. The flags include a purple flag with a white fleur-de-lis, a red flag with a white Union Jack, a red flag with a white circular emblem, and a blue flag with a white circular emblem. The scene is set in a snowy environment, suggesting a winter festival or historical reenactment.

Satisfaction and Likelihood to Recommend Experience

Satisfaction with Experience

Virtually all satisfied with their Indigenous tourism experience

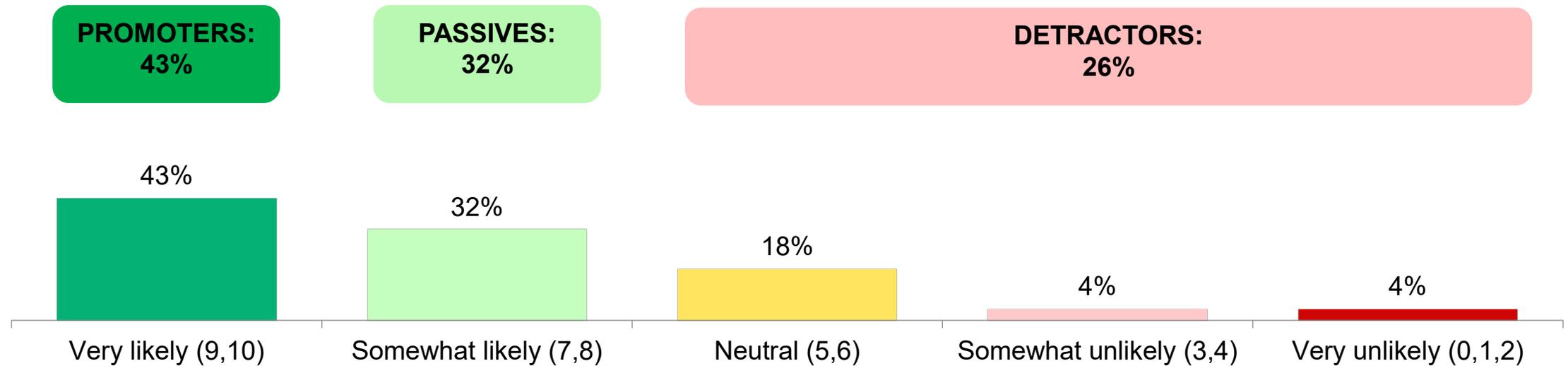


Q8. Overall, how satisfied were you with your Indigenous tourism experiences? Were you...

Base: Those participating in an Indigenous tourism experience (n=419)

Net Promoter Score: +17

Three-quarters are at least somewhat likely to recommend their experience to others



Promoters were most likely to be women (52%), university graduates (47%) and Indigenous people (50%).

**The Net Promoter Score (NPS) is calculated by subtracting Detractors (0-6) from Promoters (9-10)*

Q9. And overall, how likely would you be to recommend your experience to others? Please use the 0-10 scale below, where 0 means you are “very unlikely” to recommend and 10 means you are “very likely” to recommend your experience to others.

Base: Those participating in an Indigenous tourism experience (n=419)

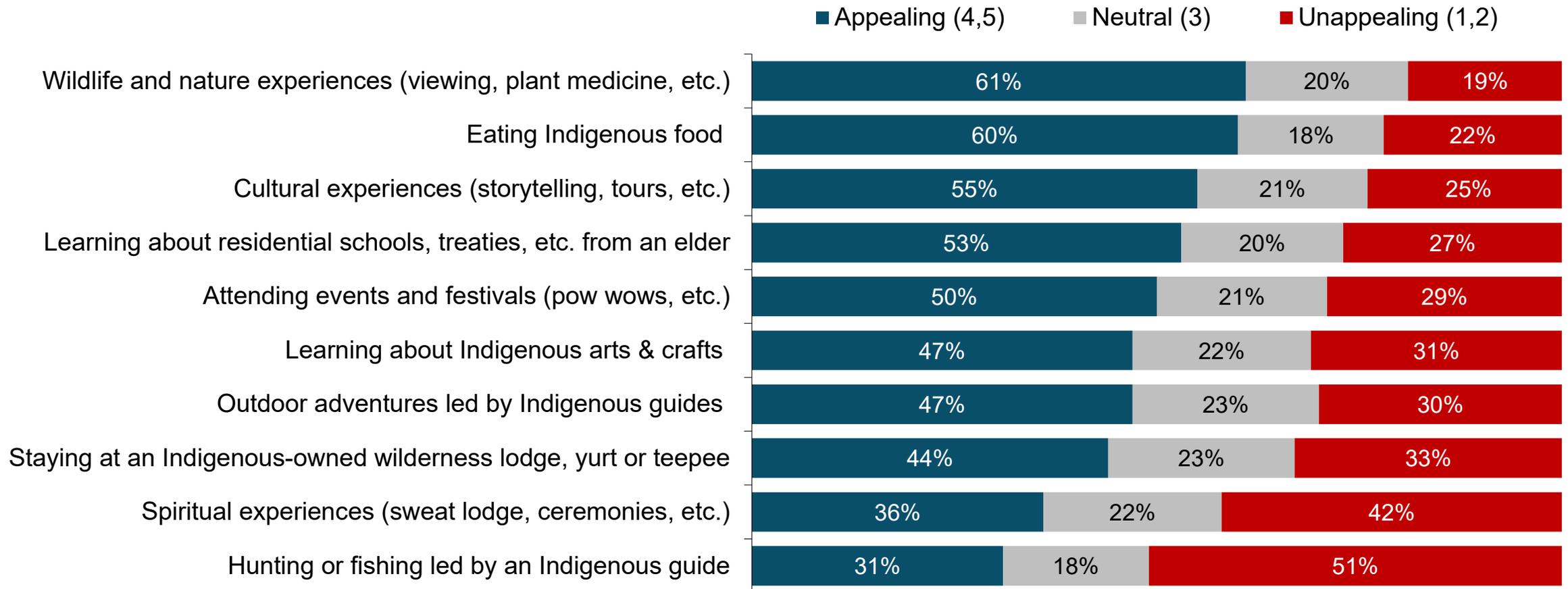
A group of people, likely at a festival or historical reenactment, are gathered in a snowy outdoor setting. They are wearing winter clothing, including hats and jackets. Several individuals are holding large flags on poles. The flags include a purple flag with a white fleur-de-lis, a red flag with a white Union Jack, a red flag with a white circular emblem, and a blue flag with a white circular emblem. In the background, there is a wooden wall or fence. A sign with a map is visible on the wall. The overall scene suggests a historical or cultural event.

Appeal of Indigenous Tourism Experiences

Appeal of Authentic Indigenous Tourism Experiences

Experiences

Experiencing wildlife and nature, eating Indigenous food most appealing attractions



Q10. Now we would like to know how interested you might be in some of these authentic Indigenous tourism experiences in the future. Please read the list below and indicate how appealing this experience is to you personally. We'll use a scale of 1 to 5 where 1 means "not at all appealing" and 5 means "very appealing".

Base: All respondents (N=800)

Appeal of Authentic Indigenous Experiences — By Subgroups



Men

More likely to find hunting and fishing with an Indigenous guide appealing.



Women

More likely to favour wildlife and nature experiences and cultural experiences (storytelling, tours, etc.).



Younger adults (18-34)

Generally find most authentic Indigenous experiences more appealing than their older counterparts, but particularly wilderness and outdoor adventures, including hunting and fishing as well as experiencing Indigenous accommodations.



Parents

Also generally find most authentic Indigenous experiences more appealing than average, including wilderness and outdoor adventures, Indigenous accommodations and food as well as spiritual or ceremonial experiences.

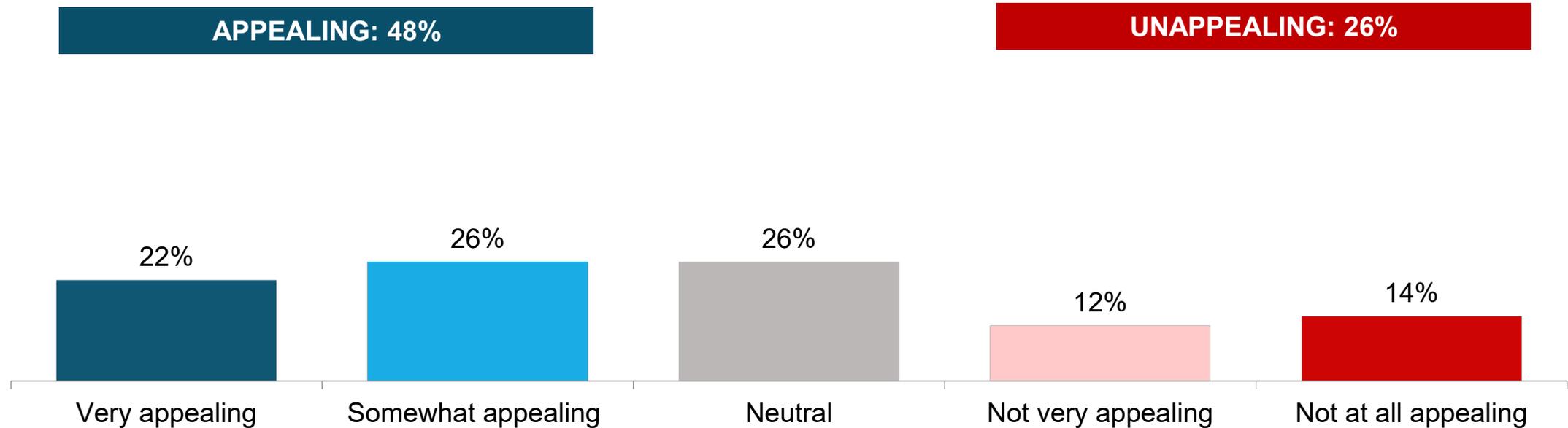


People of Colour

Particularly interested in hunting and fishing with an Indigenous guide as well as cultural and spiritual experiences.

Appeal of Pre-Planned Packages

Manitobans find pre-planned Indigenous tourism packages modestly appealing



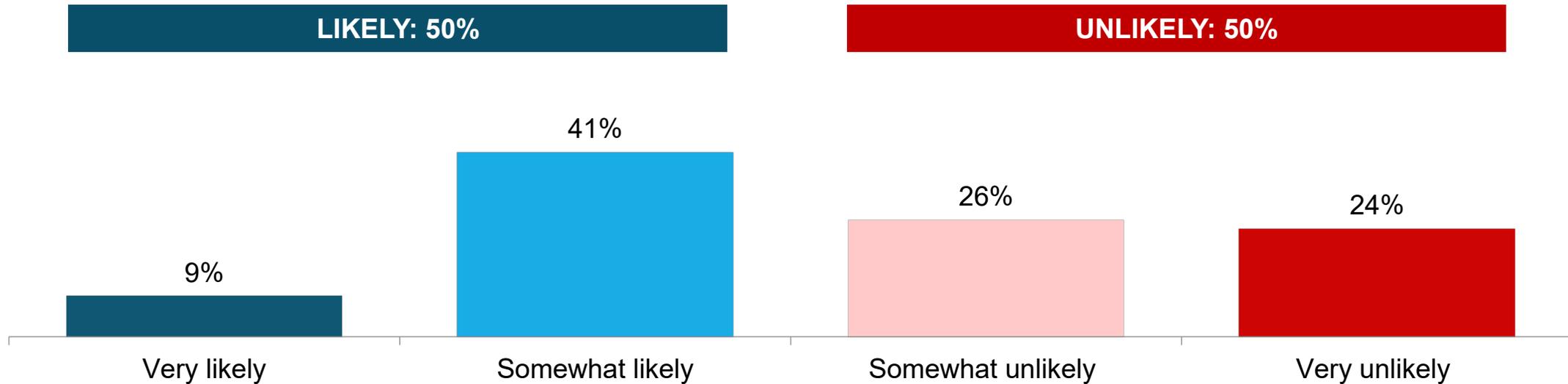
Those who are most likely to find these pre-planned packages appealing include women (55%), younger adults aged 18-34 (56%), parents with young children (59%), Indigenous people (69%), people of colour (67%), those who have visited a mainstream Indigenous attraction (55%) and those who have already had an authentic Indigenous experience (60%).

Q11. How appealing would a pre-planned package deal be that features some of the Indigenous experiences mentioned above? This package could even include things like transportation and accommodations as well as the entry fees to events or experiences.

Base: All respondents (N=800)

Likelihood of Seeking out an Authentic Indigenous Experience

One-half would be interested in taking part in an experience in the future

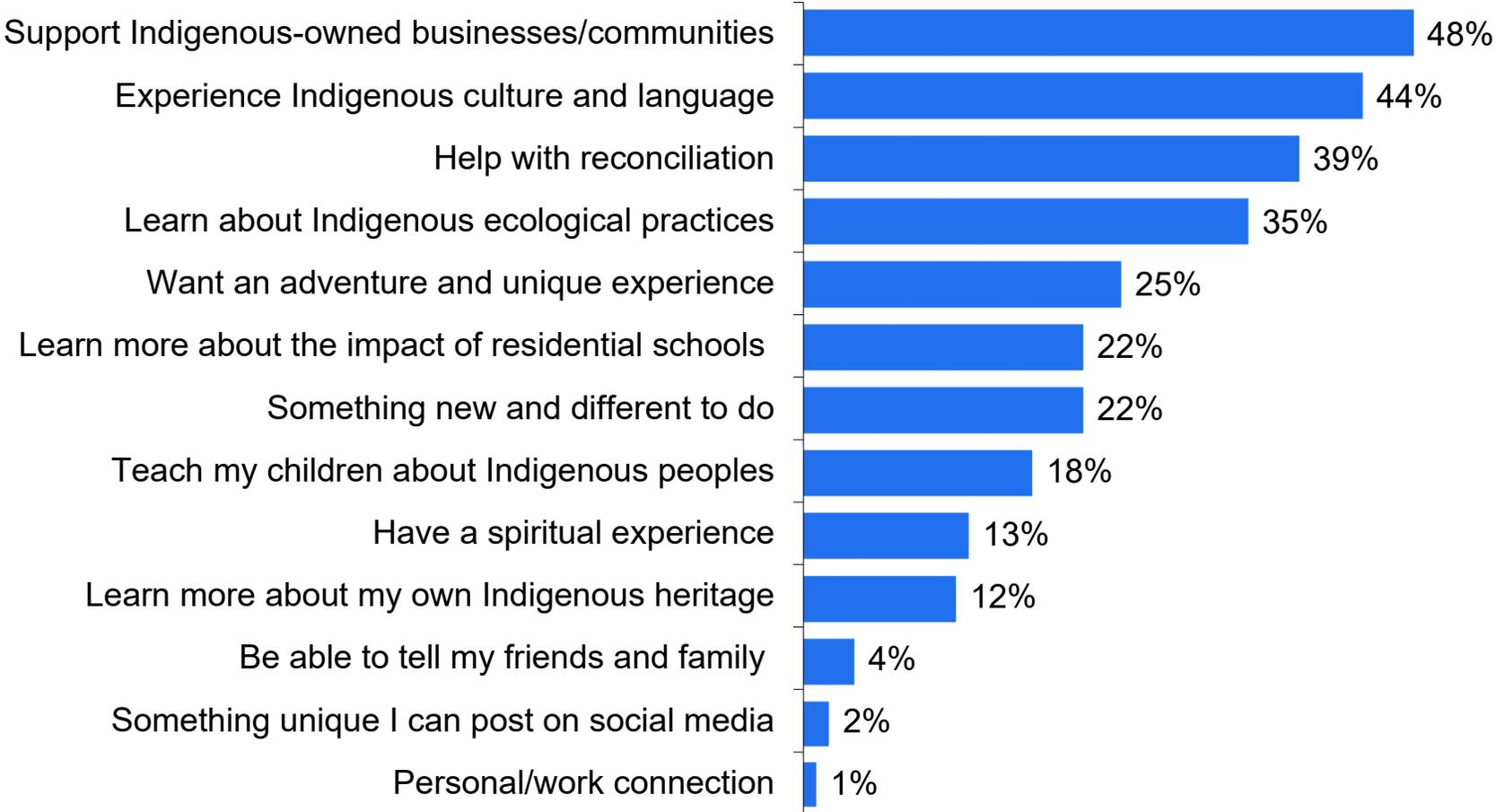


Those who are most likely to seek out authentic Indigenous experience in the future include Winnipeggers (54% very or somewhat likely), women (59%) and parents (58%).

Q12. Based on whatever you know, how likely are you to seek out an authentic Indigenous experience next time you travel in Manitoba for a holiday or a day trip?

Reasons for Seeking out an Authentic Indigenous Tourism Experience

Supporting Indigenous-owned businesses and communities is the top reason to participate



- Highest among:
- Those from households earning \$100K+ (55%)
 - Those aged 55+ (56%)
 - Those without young children at home (52%)

Q12a. Why are you likely to seek out an authentic Indigenous experience? Please choose up to three reasons, in no particular order.

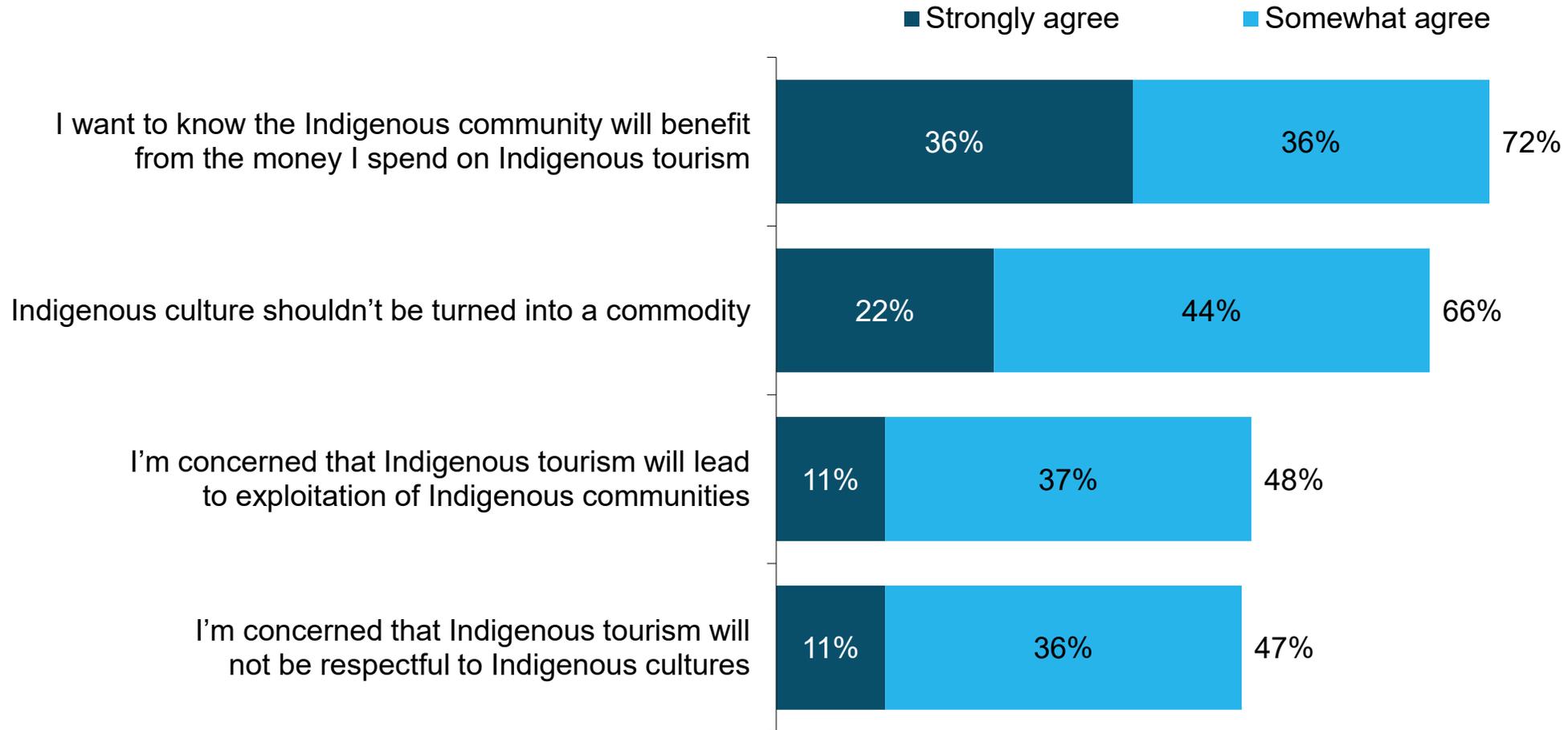
Base: Those who would seek out an authentic experience (n=402)
Multiple mentions accepted. Total will sum to more than 100%

A group of people dressed in winter attire are gathered in front of a tall wooden wall. They are holding several large historical flags on poles. The flags include a purple and white flag with a fleur-de-lis, a red flag with a white cross, a red flag with a white circular emblem, and a blue flag with a white circular emblem. The scene is set in a snowy, outdoor environment.

Barriers to Indigenous Tourism

Concerns over Impact of Tourism on Indigenous Peoples

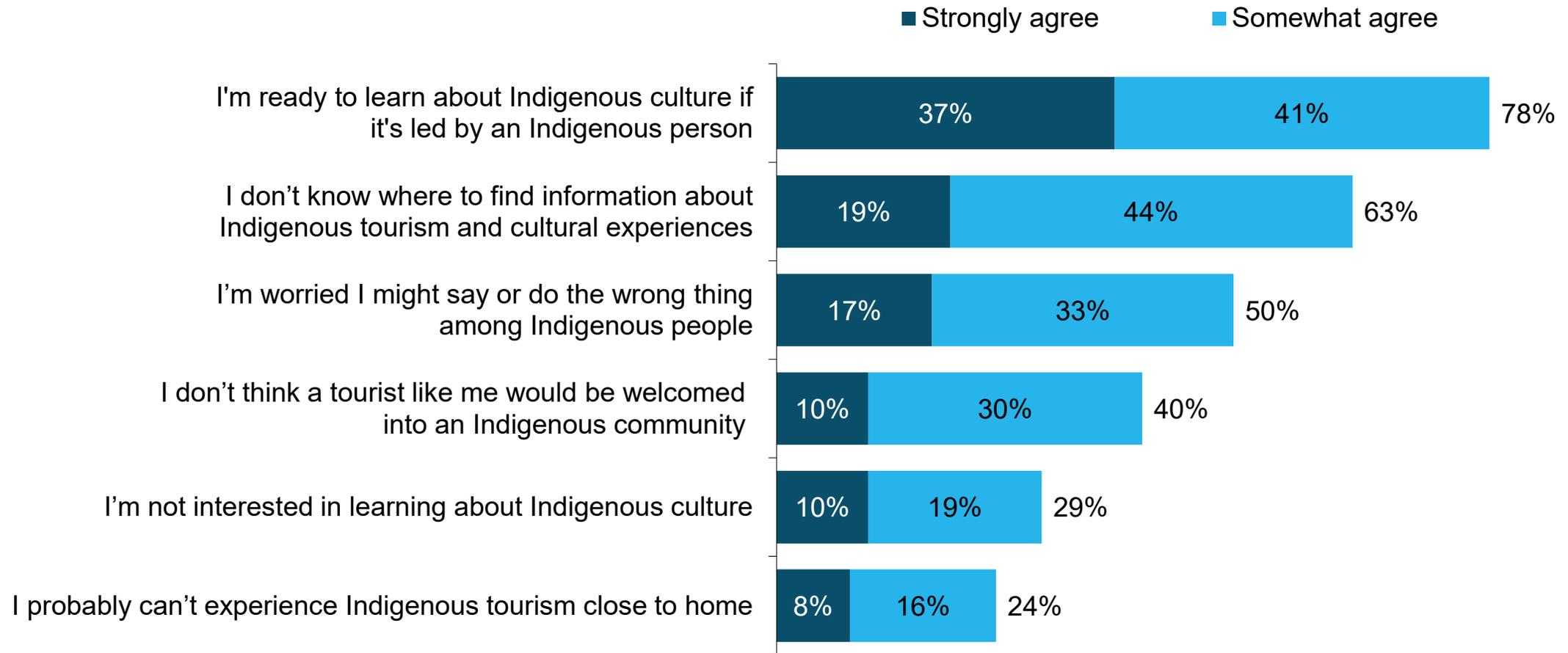
Seven in ten want to know their tourism dollars will benefit Indigenous communities



Q13. Next, please read the following statements and indicate if you agree or disagree.

Personal Comfort and Access to Indigenous Tourism

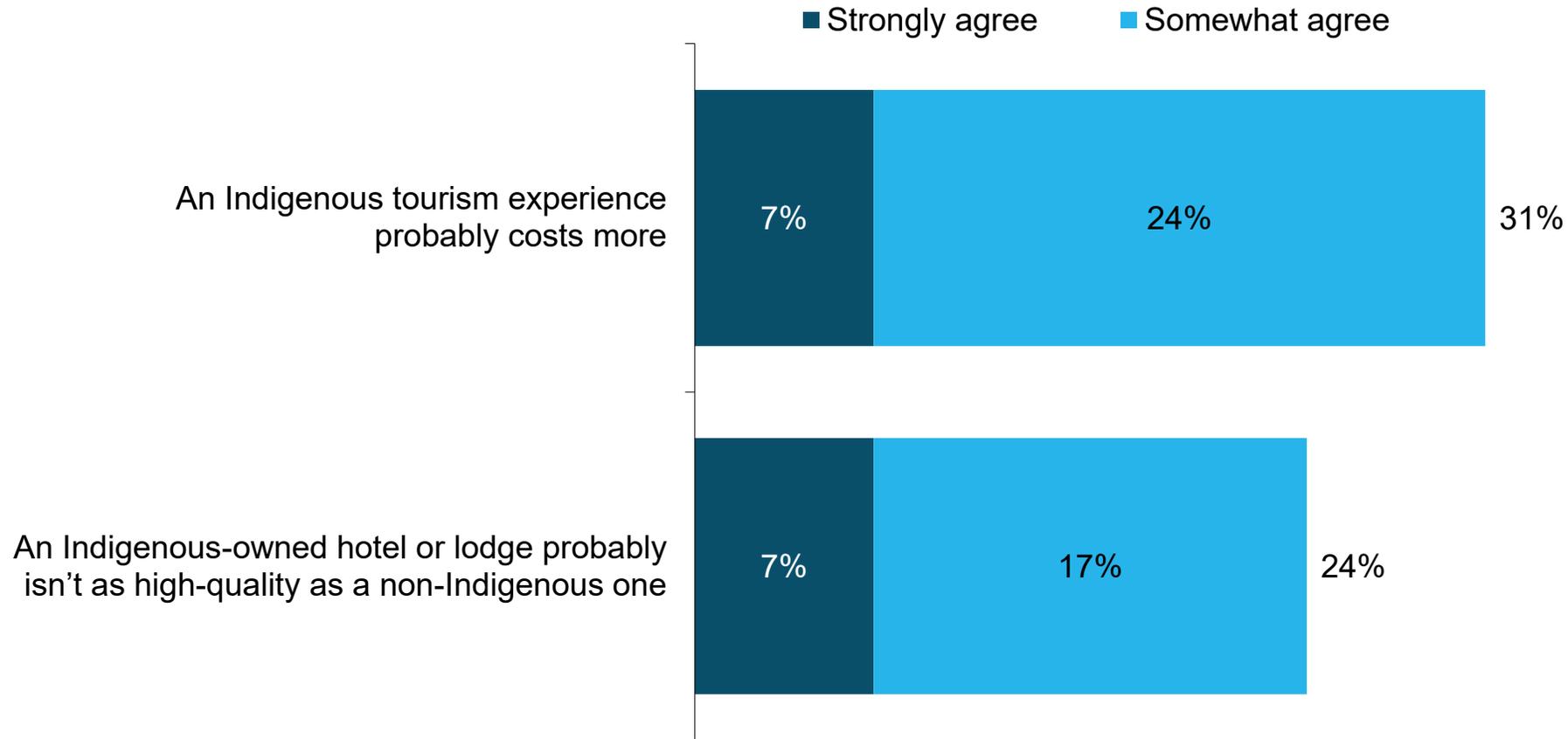
Nearly eight in ten want to learn about culture from an Indigenous person



Q13. Next, please read the following statements and indicate if you agree or disagree.

Views on Price and Quality of Indigenous Tourism Experiences

Relatively few feel the price and quality of an Indigenous experience is below par



Q13. Next, please read the following statements and indicate if you agree or disagree.

A group of people in winter clothing are gathered in front of a wooden wall. They are holding several flags on poles. The flags include a white flag with a purple fleur-de-lis, a red flag with a white cross, a red flag with a white circular emblem, and a blue flag with a white circular emblem. The people are wearing various winter hats and jackets, suggesting a cold environment. The scene appears to be a historical reenactment or a festival.

Driver Analysis

Drivers of Interest in Indigenous Tourism

To better understand respondents' views, we conducted a driver analysis, which tells us the extent to which certain attitudes predict or drive another sentiment. These kinds of analyses help us understand which attitudes underpin a willingness to seek out authentic Indigenous tourism experiences, and what messages ITAC and Travel Manitoba may wish to emphasize to frame their marketing of these activities.

We used a type of driver analysis called multiple linear regression. It allows us to see, of a group of attitudes, which ones predict an outcome. An advantage of this approach is that it accounts for all possible drivers at once, which is more powerful and accurate than running individual driver analyses with one potential predictor at a time.

We ran a driver analysis to learn more about which attitudes drive views on Q12 regarding the likelihood of seeking out these experiences (*Based on whatever you know, how likely are you to seek out an authentic Indigenous experience next time you travel in Manitoba for a holiday or a day trip?*)

Of the variables included in this analysis, two stood out as drivers of likelihood to seek out an authentic Indigenous experience. The more likely respondents were to seek out an Indigenous experience, the more strongly they agreed that:

I would go out of my way to support an Indigenous business¹.

I would love the chance to learn from an Indigenous elder².

These attitudes – a feeling of duty to support an Indigenous business and a genuine interest in interacting with an elder – are messages Travel Manitoba may wish to emphasize or activate in order to drive Indigenous tourism.

Other attitudes such as a commitment to reconciliation, a desire for authentic experiences and the view that Manitoba has vibrant Indigenous cultures were not strong drivers of interest in Indigenous tourism.

1. Standardized Coefficient: .222
2. Standardized Coefficient: .229



Credit: Indigenous Day Live