

# Manitoba Indigenous Tourism Strategy



**INDIGENOUS**  
**TOURISM MANITOBA**  
Adventure to Understanding

2021





*Brokenhead Wetlands Interpretive Trail*

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*Cover image: Cranberry Portage hoop dancers*



# Acknowledgement

A visit to Manitoba means travelling through Treaty 1, 2, 3, 4, and 5 Territory and communities signatory to Treaties 6 and 10, the original lands of the Anishinaabeg, Anish-Ininiwak, Dakota, Dene, Ininiwak and Nehethowuk and the homeland of the Métis.

*Fisher Bay*

# Introduction

In 2017, Travel Manitoba and the Indigenous Tourism Association of Canada (ITAC) established a three-year Memorandum of Understanding (MOU) to foster the growth of the Indigenous tourism sector in the province. The MOU established the foundation for partnerships with other organizations interested in advancing economic development and tourism growth to support businesses and communities throughout Manitoba. Based on industry input through regional engagement sessions as well as direction from the Manitoba Indigenous Tourism Advisory Committee, the Manitoba Indigenous Tourism Strategy was developed and officially launched in April 2019.

Since the launch of the strategy, significant progress has been made including:

- Support for Indigenous business and product development through the ITAC's Manitoba Tourism Product Development Coordinator position, resulting in an increase in market-ready and export-ready Indigenous owned tourism experiences in Manitoba.
- Over \$1 million in funding to Indigenous businesses in Manitoba for tourism development and COVID-19 recovery.
- Development of the *Adventure to Understanding* brand in 2019.
- Establishment of the Manitoba Indigenous Tourism Association in 2020.
- Development of marketing content including photography, video and article assets.



In early 2020, the outbreak of COVID-19 brought the global tourism industry to a standstill and significantly impacted Manitoba's Indigenous tourism sector. The full impact of COVID-19 has yet to be determined, and further challenges lie ahead. Visitation levels seen in 2019 may not return until 2024.

With this in mind, an updated Manitoba Indigenous Tourism Strategy that recognizes the far reaching impacts of COVID-19 and provides direction for the future is required. The updated strategy outlines key initiatives to be implemented over the next few years, as well as a re-examination of the original vision, mission and targets. As with the original strategy, success will be dependent on the alignment of efforts toward common goals. The plan will be regularly reviewed and adapted, as circumstances warrant and as progress is made. By working together, the vision for a prosperous Indigenous tourism industry across Manitoba, sharing authentic, unique and engaging experiences can be achieved.

# Introduction

This updated Manitoba Indigenous Tourism Strategy is a partnership between the Indigenous Tourism Association of Canada (ITAC), Travel Manitoba and the Manitoba Indigenous Tourism Association (MITA). The strategy is the basis for renewing the Memorandum of Understanding between ITAC and Travel Manitoba and sets out the partnership framework for the next three years.

## The Importance of an Indigenous Tourism Strategy

Manitoba is home to 63 First Nations communities and is the birthplace of the Métis Nation of Canada. More than 195,000 First Nations, Métis and Inuit peoples live in Manitoba, accounting for 16.7% of the total population of the province.

The Manitoba Tourism Strategy identifies Indigenous tourism experiences as an important part of visiting Manitoba and that these experiences have high potential to be recognized as iconic Canadian tourism products that capture the attention of visitors from around the world.

Indigenous tourism has the potential to change perspectives, as well as preserve culture, language and traditions. Indigenous tourism provides an opportunity to improve the socio-economic environment for Indigenous communities. Manitoba's diverse landscape and Indigenous cultures lay the foundation to create and enhance unique world-class experiences.

The Manitoba Indigenous Tourism Strategy acknowledges truth and reconciliation efforts and aligns with guidance provided by the United Nations Declaration of the Rights of Indigenous Peoples.

## Responding to the Calls of the Truth and Reconciliation Commission

The Calls to Action of the Truth and Reconciliation Commission are key considerations in advancing the Indigenous tourism growth strategy in Manitoba. Travel Manitoba, ITAC and MITA are engaging partners to respond to these three calls to action:

43

We call upon federal, provincial, territorial and municipal governments to fully adopt and implement the United Nations Declaration on the Rights of Indigenous peoples as the framework for reconciliation.

92

We call upon the corporate sector in Canada to adopt the United Nations Declaration on the Rights of Indigenous Peoples as a reconciliation framework and apply its principles, norms and standards to corporate policy and core operational activities involving Indigenous peoples and their lands and resources.

57

We call upon federal, provincial, territorial and municipal governments to provide education to public servants on the history of Indigenous peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Indigenous rights, Indigenous law and Indigenous-Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights and anti-racism.



# Introduction

*"Manitoba has a strong, resilient Indigenous culture. This strength will be the foundation for recovery and growth of authentic tourism experiences."*

**- Keith Henry, ITAC President and CEO**



Manito Ahbee



# Approach

This updated strategy is based on significant secondary research in the areas of COVID-19 recovery forecasting, industry trends and research on domestic and international market opportunities. Industry engagement over the course of the COVID-19 pandemic also identified valuable insights and direction. The Manitoba Indigenous Tourism Association board provided direct input into the strategy's renewal through a four-phase process:

## **PHASE 1**

Board member survey

## **PHASE 2**

Facilitated planning session with MITA, ITAC and Travel Manitoba

## **PHASE 3**

Development of updated Manitoba Indigenous Tourism Strategy

## **PHASE 4**

Strategy workshop with MITA, ITAC and Travel Manitoba



*Bannock Point Petroforms*



# State of the Industry

The impact of COVID-19 on Manitoba's Indigenous tourism sector continues to be profound and pervasive. While the full ramifications will not be clear until well into 2021 and beyond due to the evolving nature of the pandemic, it is evident that tourism is one of the hardest hit industries. Tourism was first to be impacted and will take the longest to recover. Manitoba's Indigenous tourism sector has faced additional barriers, including access to some funding programs and severe lock-downs in some communities making adaptation of business models more challenging.

This section examines the state of Manitoba's Indigenous tourism sector from a development perspective, how the pandemic is expected to impact global, national and local tourism, and the path forward to recovery.

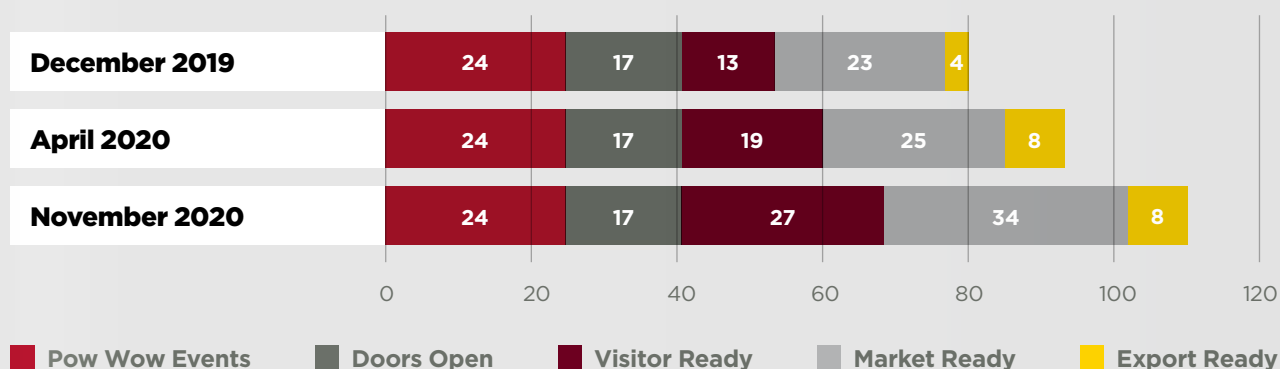


## Manitoba Indigenous Tourism Experiences – Supply

Since the original Manitoba Indigenous Tourism Strategy was launched, ITAC has worked to build the tourism readiness capacity of Indigenous tourism businesses in Manitoba. This process has involved one-on-one evaluation of businesses to assess their tourism readiness status, development of business specific plans to address shortfalls, identification of funding where needed to support development, in addition to ongoing engagement and support for each business. As a result of this hands-on approach to address barriers, growth in the number of market-ready and export-ready businesses has occurred.

Export-ready Indigenous businesses are generally clustered in Churchill or are focused on the accommodation and foodservice sector. These businesses have been particularly hard hit by the pandemic and may need additional support to pivot to new markets. Given that Manitoba has so few export-ready businesses overall and the expected slow recovery of international markets, a major focus will be on the domestic market in the short-term.

### Tourism Readiness Status of Indigenous Tourism Businesses in Manitoba



# State of the Industry

## Markets of Greatest Potential – Demand

In 2019, Destination Canada and ITAC evaluated markets around the world for traveller interest in Indigenous tourism. While the pandemic has most certainly impacted short-term demand, in the long-run these markets hold potential for Indigenous tourism experiences in Manitoba. Given the small number of export-ready businesses in Manitoba and the expected interest in drive-to markets during pandemic recovery, the domestic market holds the most potential in the immediate future.

Additional research is needed to better understand the potential to attract domestic travellers to Indigenous tourism experiences in Manitoba. As borders open and the global economy rebounds, Churchill operators as well as hunting and fishing lodges will return to their focus on international customers. As additional export-ready businesses develop over time, marketing efforts will continue to shift to an international focus.

	CANADA	UNITED STATES	FRANCE	GERMANY	UNITED KINGDOM	CHINA	JAPAN	AUSTRALIA
Immediate potential for Canada in the next two years (tourists)	9,571,000	53,010,000	4,156,500	5,098,500	4,814,000	10,930,000	2,540,000	2,665,000
Immediate potential for Indigenous tourism in the next two years (tourists)	2,584,000	17,493,500	2,618,500	2,396,500	1,781,000	3,825,500	533,500	746,000
Travellers in the past three years that took part in an Indigenous experience	9%	18%	37%	33%	19%	27%	7%	16%
Percentage of market interested in Indigenous cultural experiences	27%	33%	63%	47%	37%	35%	21%	28%
Percentage of likelihood to visit Manitoba / Saskatchewan region	19%	18%	12%	14%	11%	40%	21%	17%

Source: 2019 Market Snapshot: Understanding the Opportunity for Indigenous Tourism Business in Canada, Destination Canada.



# State of the Industry

## Global Tourism Sector – COVID-19 Impact

The impact of COVID-19 on the tourism sector globally is severe and the full extent of the pandemic's effect on tourism is still not known. It is expected that the effects of COVID-19 on the global tourism sector will not be fully understood until 2021 and beyond. But what is clear now is that the tourism industry is suffering.

The United Nations World Tourism Organization (UNWTO) reports that 100% of all worldwide destinations have introduced travel restrictions in response to the pandemic at some point during 2020. International tourist arrivals fell by 72% in January-October 2020 over the same period in 2019 due to travel restrictions and low traveller confidence. The decline represents 900 million fewer international tourist arrivals compared to 2019 and translates to a loss of US\$935 billion in export revenues from international tourism, more than 10 times the loss incurred during the global economic crisis in 2009. The UNWTO has developed three recovery scenarios, with a return to 2019 levels over the next two and half to four years.<sup>1</sup>

## Canadian Tourism Sector – COVID-19 Impact

COVID-19's devastating tourism impacts will affect the lives of millions of Canadians. According to Statistics Canada estimates, tourism lost between 300,000-400,000 jobs in 2020, plus an additional 100,000-140,000 jobs in other sectors that provide goods and services to tourism. Destination Canada's models show that 80% of businesses in the industry are at risk of failure – this means that 58,000 businesses ranging from five to five hundred

employees in Canada are at risk of closing, representing 10% of SMEs. According to Tourism Economics, tourism recovery is expected to lag significantly behind the rest of the economy.

For the Indigenous tourism sector in Canada, employment losses are expected to be over 50% in 2020. Indigenous operators in food and beverage, recreation and outdoor activities, as well as accommodation are expected to be the hardest hit. The Conference Board of Canada forecasts that Canada's Indigenous tourism sector revenues and GDP will decline by 66% for 2020.<sup>2</sup>

In November 2020, Destination Canada released a three scenario forecast for the tourism sector based on when international borders might reopen. If the border opens by April 2021, the industry is expected to see a 54% loss in 2021 compared to 2019 and will not fully recover until 2025. Under the October 2021 open border scenario, 2021 will see a 60% loss and full recovery is not expected until 2026.<sup>3</sup>

The domestic market is expected to recover by 2022 under all scenarios if COVID-19 remains under control following the second wave. Converting Canadians to travel within Canada in 2021 and beyond will be critical to success. Canadians normally spend more on travel abroad (\$40B) than international travellers spend in Canada (\$23B).

<sup>1</sup> UNWTO World Tourism Barometer, Volume 18, Issue 7, December 2020, <https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.7>

<sup>2</sup> The Impact of COVID-19 on Canada's Indigenous Tourism Sector: Insights from Operators, The Conference Board of Canada, June 2020.

<sup>3</sup> Visitor Demand Forecast Update, November 2020, Destination Canada

# State of the Industry

## Manitoba Tourism Sector – COVID-19 Impacts

Travel Manitoba engaged Tourism Economics, an Oxford Economics company, to forecast tourism recovery for Manitoba and assess key areas of the visitor economy that are under stress during the pandemic.

Tourism Economics developed three forecast scenarios which are presented in the chart below: upside, baseline and downside. Under the baseline scenario, Manitoba does not return to 2019 visitor spending until 2024. Economic losses over the 2020 to 2024 period under the baseline scenario include \$1.8 billion in visitor spending, \$1.6 billion in GDP, nearly 4,000 jobs and over \$300 million in provincial taxes.

### Tourism Economics Forecast for Manitoba Tourism Industry Recovery

Dollars, millions, losses compared to 2019

	UPSIDE SCENARIO		BASELINE SCENARIO		DOWNSIDE SCENARIO	
	Visitor Spending	Losses	Visitor Spending	Losses	Visitor Spending	Losses
2019	\$1,628		\$1,628		\$1,628	
2020	\$863	\$765	\$780	\$849	\$691	\$937
2021	\$1,225	\$404	\$1,021	\$607	\$809	\$819
2022	\$1,523	\$105	\$1,368	\$260	\$1,030	\$598
2023	\$1,710	–	\$1,541	\$87	\$1,311	\$317
2024	\$1,828	–	\$1,653	–	\$1,548	\$80
2025	\$1,970	–	\$1,791	–	\$1,685	–
2026	\$2,099	–	\$1,917	–	\$1,813	–
2027	\$2,229	–	\$2,046	–	\$1,945	–
2028	\$2,356	–	\$2,174	–	\$2,077	–
2029	\$2,490	–	\$2,309	–	\$2,216	–
2030	\$2,631	–	\$2,452	–	\$2,366	–
<b>2019-2030 Growth</b>						
\$	\$1,003		\$824		\$738	
%	62%		51%		45%	

Source: Statistics Canada, Tourism Economics



# State of the Industry

The Conference Board of Canada completed an examination of COVID-19 impact on Indigenous tourism businesses in Manitoba. The industry is expected to see GDP and revenue losses near 70% in 2020.<sup>4</sup>

## Conference Board of Canada Estimate on Manitoba Indigenous Tourism Sector Impact

	REVENUE (\$)	GDP (\$)	EMPLOYMENT	WAGES (\$)
2017	94,157,373	41,700,000	1,255	30,200,000
2020	30,036,202	12,581,056	547	14,273,925
<b>Decline</b>	<b>-68.1%</b>	<b>-68.6%</b>	<b>-53.8%</b>	<b>-53.5%</b>

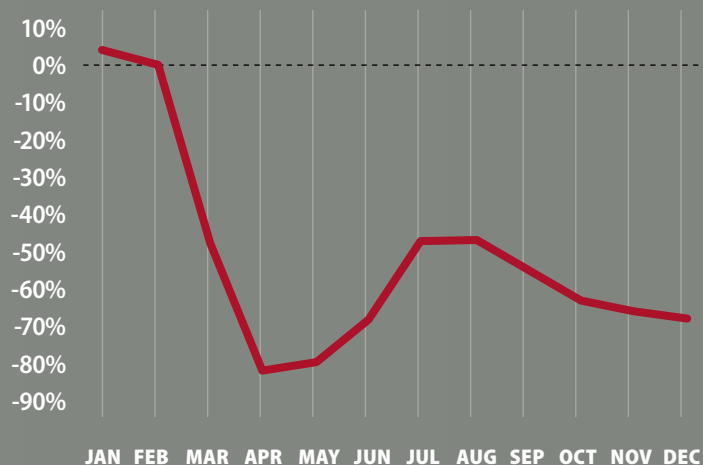
### Manitoba Accommodation Impact

Manitoba's accommodation revenue dropped precipitously in 2020. Tourism Economics estimates that room revenue will still be down 22% next spring and will not recover to 2019 levels until 2025.

Indigenous accommodation businesses operating on reserve may have been more severely impacted due to restrictions in some First Nations communities and additional challenges in accessing federal and provincial funding. However, in cases where the accommodation is community owned, they may be receiving additional support from the community to survive the pandemic.

### Room Revenue in Manitoba, 2020

Percentage changed compared to corresponding month in 2019



Source: STR

<sup>4</sup> The Impact of COVID-19 on Canada's Indigenous Tourism Sector: Insights from Operators, The Conference Board of Canada, June 2020.

# State of the Industry



## Lodge and Outfitter Impact

Hunting and fishing lodges are particularly vulnerable since the majority of their clientele is international and older than 50 years of age. With international borders likely to remain closed until well after vaccine distribution, the hunting and fishing sector's 2021 spring and summer high season is at risk. Indigenous-owned lodges may be significantly impact if located in northern regions that rely on international fly-in clientele or if they are located in a First Nations community that has experienced significant restrictions.

The niche nature of these businesses and reliance on relationships with clients means that they cannot be quickly replaced if they are bankrupt or otherwise closed. Once these lodges are closed down, they may spend several years not operating, if they ever reopen. They may present a potential long-term or permanent loss of a resource for Manitoba. A 50% loss of hunting and fishing lodges would cost the province \$33 million in business sales, 404 jobs and \$5 million in provincial and local tax revenue. Indigenous-owned hunting and fishing lodges may have been more disadvantaged due to community specific restrictions.

## Economic Impact of Hunting/Fishing Lodges

Dollar figures in millions

	2019 Impact	Annual Cost of Lost Business		
		25%	50%	75%
<b>Business Sales</b>	\$65	\$16	\$33	\$49
<b>GDP</b>	\$72	\$18	\$36	\$54
<b>Income</b>	\$32	\$8	\$16	\$24
<b>Jobs</b>	808	202	404	606
<b>Government Revenue</b>				
Provincial	\$7	\$2	\$4	\$5
Local	\$2	\$1	\$1	\$2

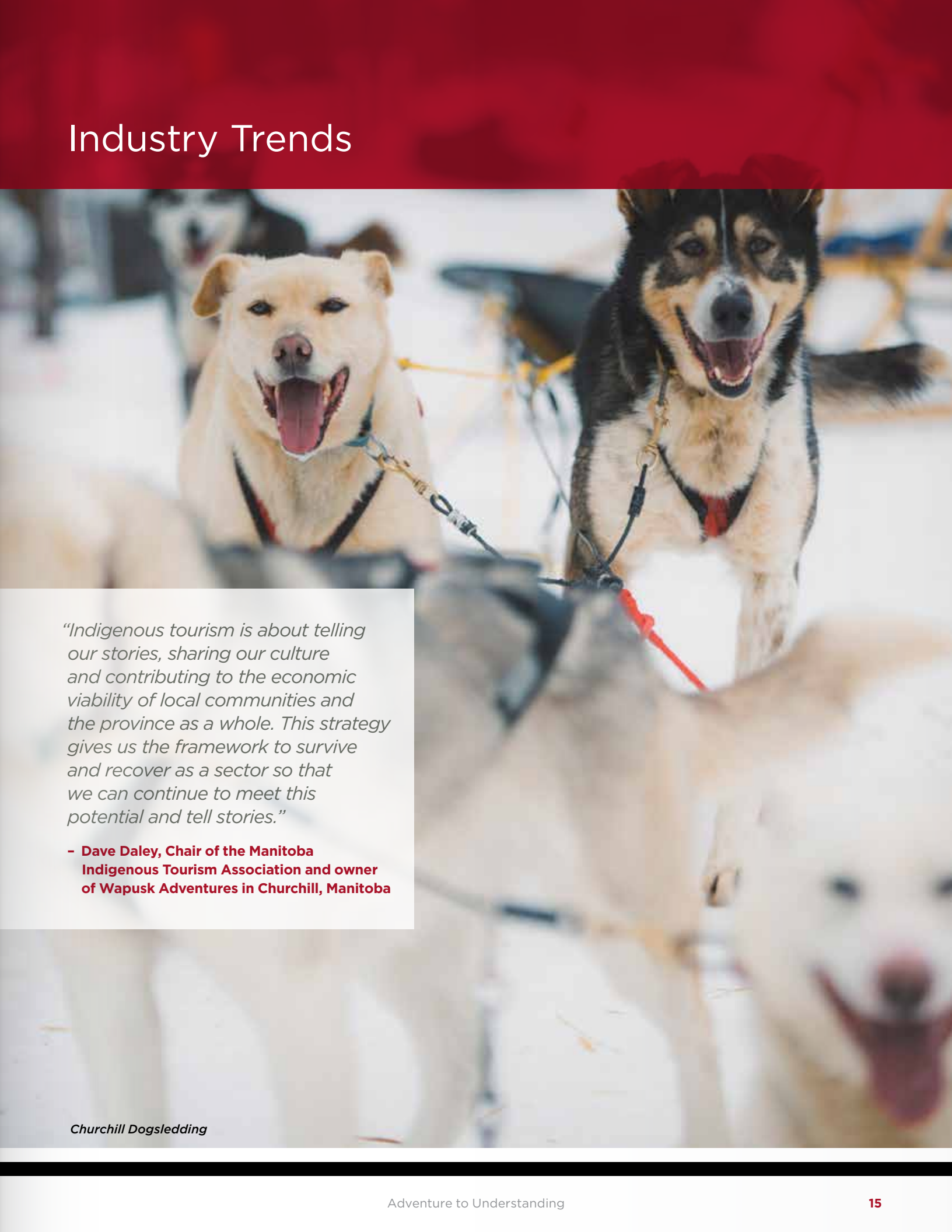
Sources: Probe Research Inc; Tourism Economics

## Churchill Impact

Churchill's economy is largely dependent on tourism. Tourism Economics calculates that tourism is 30 times as important for Churchill than the province as a whole and likely supports more than half of all wages in Churchill. Churchill's visitor economy is at severe risk in 2021. Even as vaccine distribution becomes widespread in 2021, Churchill's visitor economy may not see major revitalization until 2022 since 80% of all visitors are international. Churchill is an internationally known flagship for Manitoba's visitor economy and a major hub for Indigenous tourism in the province.



# Industry Trends



*"Indigenous tourism is about telling our stories, sharing our culture and contributing to the economic viability of local communities and the province as a whole. This strategy gives us the framework to survive and recover as a sector so that we can continue to meet this potential and tell stories."*

**- Dave Daley, Chair of the Manitoba Indigenous Tourism Association and owner of Wapusk Adventures in Churchill, Manitoba**

*Churchill Dogsledding*

# Industry Trends

**The trends outlined here speak to the growing sophistication of the tourism sector and how COVID-19 has propelled the use of enhanced technology. Manitoba's Indigenous tourism sector will need to keep pace with this advancement and the changing expectations of visitors. Finding the balance between technology and authentic experience will be key.**

## **Increased interest in local Indigenous stories**

Media coverage of the Truth and Reconciliation Commission and the National Inquiry into Missing and Murdered Indigenous Women and Girls has raised awareness of Indigenous issues and culture in Canadian society. Schools now focus more on Indigenous culture and history. Many organizations encourage staff to participate in cultural training opportunities. Tourism provides another option for Indigenous peoples to share their stories and advance reconciliation with those that are interested in learning more about Indigenous culture.



## **Acceleration of digital and e-commerce platforms**

The necessity of doing business online has made consumers significantly more open to digital offerings and experiences – a shift that marketing executives believe will persist even after the pandemic recedes. This suggests digital marketing efforts will command a greater share of total marketing spending moving forward. Indigenous businesses will also need to adapt to these new expectations to remain competitive. For businesses operating in remote areas with limited Wi-Fi and cellular service, keeping pace becomes even more challenging.

## **Shift to localhood and local audiences**

The next generation of destination marketing is based on building community between locals and visitors around different passion points. The destination is positioned as a living social platform to connect like-minded visitors and locals, rather than only being a physical environment with tourism experiences. This trend is a good fit with Indigenous experiential tourism where tourists are immersed in the local community to better understand culture.

## **Travellers seek transformational experiences**

Travellers today are increasingly drawn to travel as a form of self-actualization and personal transformation and growth. They want more than a simple visit to a new destination or days spent relaxing on a beach. Instead, the travel they are seeking is an experience of the world that goes deep – one that changes them in ways in which they may not even be aware. Indigenous tourism experiences have the power to be transformational, to change perceptions and to provide a connection to land and culture.



# Industry Trends

## Health and Safety are essential

Health and COVID-19 related safety is front and centre in the minds of travellers. Communicating what steps your destination is taking is important, but consistency and execution is even more critical. Customers will still have reservations about starting to travel again and will need an extra level of assurance beyond a marketing message. Indigenous communities may also have reservations around acceptance of visitors and it will take time to rebuild trust. Effective communication with both travellers and communities will be key to future success.



## Shift towards outdoor experiences

Behaviours are changing because of COVID-19, including an increased interest in spending more time outdoors, where transmission rates of the virus are believed to be lower. This shift is expected to continue and will shape the destination selection process for consumers. This trend is an opportunity for land-based Indigenous tourism experiences in Manitoba.

## Long road ahead to rebuild consumer confidence

Canada's quick initial rebound in consumer confidence is showing signs of slowing, suggesting there's a long road ahead for a full economic recovery from the pandemic. As a result, Canadians will be travelling closer to home in the near future exploring local cultures and experiences. Shifting focus in the short-term to local markets where possible will be key to a successful recovery for many Indigenous businesses.

## Money-back guarantees and discounts can drive bookings

For travellers, the coronavirus pandemic is spreading fear and uncertainty – and a desire for discounts and refunds. A Google Canada Survey showed money-back guarantees and discounts were the most important things travel companies could offer today to help consumers book a holiday within the next year.



# Industry Trends

## Events industry rethinking business models and success factors

COVID-19 has accelerated the need to explore new business models and success factors for events. Industry leaders are examining new approaches that can deliver success in both an in-person and virtual environment while diversifying audiences, taking into account generational and psychographic shifts. Given the diversity of Indigenous peoples and cultures throughout the province, Manitoba is a natural fit for Indigenous events.



## A shift to destination management

Today, a growing number of destination leaders are advocating for a stronger role in “destination management,” which speaks to the industry investing time and resources in community-driven destination development and expanding their networks among a wider breadth of local organizations outside the hospitality and tourism industry. Working in partnership with local communities will be key to the development of many Indigenous tourism experiences. Tourism can be an important source of economic growth and employment for First Nations communities. Communicating the significance of the tourism opportunity will be critical to securing local support and collaboration.



## Greater involvement in advocacy

The most progressive organizations today are positioning themselves as a shared community value, with an integral role in uplifting a greater scope of different audiences – both local and global. Community advocacy has never been more critical to help onboard residents as destination ambassadors. Having a strong voice to advocate will be particularly important for Manitoba’s Indigenous tourism sector as it recovers and rebuilds from the pandemic.

## Stronger collaboration and organizational alignment

Destination leaders are prioritizing greater collaboration and alignment with local government, key industry stakeholders, civic leaders and the non-industry community. They are increasingly building coalitions among the public and private sectors around a shared vision for the future of the destination, which prioritizes inclusivity, diversity, advanced mobility and connectivity, workforce development and higher quality of life. The partnership between MITA, ITAC and Travel Manitoba provided a solid collaboration framework on which to build.

# Industry Trends

## The Silver Lining

While Manitoba's Indigenous tourism sector has been severely impacted by the pandemic, it is poised for rapid recovery and future resiliency:

- Many Indigenous tourism businesses were in the start-up and development stage when the pandemic hit. A significant number have used stimulus grants to advance business development by investing in websites, marketing content, equipment, signage and infrastructure. Many will be in a position to re-open at a more advanced tourism readiness level post-COVID as a result.
- Low reliance on international visitors and large events/conferences compared to some jurisdictions means that Manitoba was impacted less overall by COVID and will achieve a quicker recovery compared to other jurisdictions.
- Manitoba's wide open spaces, low population density and abundant nature and wildlife assets make it the perfect fit with consumer interests and expectations for safety. Many land-based Indigenous experiences will be an ideal match with consumer sentiment.

*Creations & Artists Showcase*



# Opportunities and Challenges

This section outlines opportunities and challenges that impact the Indigenous tourism sector in Manitoba and the ability of the strategy partners to implement the strategy.



*Thompson area*

# Opportunities and Challenges

## Opportunities

- The Manitoba government's commitment to advance Indigenous economic development.
- Growing domestic and international interest in Indigenous tourism experiences.
- In the short-term, domestic markets are the biggest growth opportunity. As the economy recovers, borders open and new export-ready businesses emerge, marketing opportunities will shift more to international markets.
- Diversity of Indigenous peoples and cultures throughout Manitoba.
- Multifaceted landscapes, ecosystems and natural spaces.
- International market awareness of Churchill.
- A large urban Indigenous population providing a concentration of human and cultural resources.
- Attitudinal shifts towards embracing a slower, more mindful pace of life, appreciating nature and spirituality.
- Travel-related behavioural shifts including a major surge in road trips taken in the province and the search for hidden gems.
- Increased consumer interest in making one-on-one connections provides opportunities for storytelling, traditional cooking, stargazing, guided hikes, arts and crafts, etc.
- The creation of MITA is an opportunity for the Indigenous tourism sector in Manitoba to recover and advance through a strong unified voice.
- Advancing awareness of the *Adventure to Understanding* brand through the strong collaborative partnership between ITAC, MITA and Travel Manitoba.
- Growing interest by Canadians in supporting Truth and Reconciliation initiatives including education and training programs.

## Challenges

- Access to resources, training, sustainable funding and infrastructure.
- Limited financial knowledge among Indigenous entrepreneurs.
- Limited research and awareness of the Indigenous tourism opportunity.
- Low levels of product tourism readiness pre-pandemic coupled with expected business losses means more effort and time will be needed to stabilize the sector.
- Lack of coordinated approach to leadership development.
- Limited infrastructure to access experiences.
- Lack of visibility and awareness of Indigenous experiences.
- Skepticism around authenticity. Validating the authenticity of Indigenous owned businesses will be important to building the trust of travellers as well a building trust within Indigenous communities.
- Hesitation around being welcomed by an Indigenous community was a challenge pre-COVID, but is heightened as communities address outbreaks – trust of visitors will take time to rebuild.
- Difficult to predict changes in the pandemic context and the impact of travel restrictions, economic closures and vaccine distribution.
- Lack of internet connectivity for some communities may hinder recovery and growth.
- Increased costs, such as insurance, that businesses will face post-pandemic.
- Small business support from government is limited.
- Perceptions that Indigenous experiences are homogeneous.
- Difficult to collect marketing assets (video, photography) during the pandemic due to business closures and event cancellations.
- The positioning of marketing messages needs to continually evolve because of changing sentiment towards visitors in Indigenous communities and changing traveller expectations.



# Vision and Mission

The following vision and mission responds to all key learnings and inputs gathered throughout the process of updating the Manitoba Indigenous Tourism Strategy.

## **Vision**

*A prosperous Indigenous tourism industry across Manitoba, sharing authentic, unique and engaging experiences*

## **Mission**

*Sharing our stories, supporting and strengthening the Indigenous tourism economy in Manitoba*

Fisher Bay



# Targets

The original Manitoba Indigenous Tourism Strategy identified GDP, jobs, number of businesses and growth in tourism readiness as key performance indicators (KPIs) for the success of the strategy. Prior to the pandemic, Manitoba was well on its way towards meeting the targets established in the original strategy.

At a strategic planning session held in December 2020, the MITA board validated these KPIs and also identified training support as an important measure. The following targets have been identified for the updated Manitoba Indigenous Tourism Strategy:

- **Ensure stabilization and recovery of Indigenous tourism businesses in Manitoba to achieve a 20% increase in market-ready and export-ready businesses by 2025**
- **Return to 2019 employment and GDP levels by 2025**
- **Align tourism training programs to meet the specific needs of Indigenous businesses on an annual basis**



*Inukshuk in Churchill*

# Goals and Initiatives

A series of goals and initiatives were established for the Manitoba Indigenous Tourism Strategy to support the delivery of the Vision and Mission. These goals and initiatives provide a focused framework of tangible actions and desired outcomes for the industry to collaborate on and embrace together. The overall goals have not changed from the original strategy, but the initiatives under each goal have been updated to reflect the advancement achieved by the industry pre-COVID and the need for pandemic recovery.

## Strategic Goals

- 1 Leadership & Collaboration – Lead the Retention, Recovery and Growth of the Indigenous Tourism Economy in Manitoba**
- 2 Experience Development – Support the Stabilization, Recovery and Development of Authentic Indigenous Tourism Experiences**
- 3 Marketing – Share Our Stories**

Each goal has a corresponding set of specific initiatives that have been created to directly address gaps or leverage key opportunities.

*Grass River*

# Goals and Initiatives

## 1

### **Leadership & Collaboration - Lead the Growth of the Indigenous Tourism Economy in Manitoba**

Leadership and collaboration are necessary for the Indigenous tourism sector in Manitoba to recover and prosper. This begins with a robust and vibrant Manitoba Indigenous Tourism Association that has a strong voice to lead and advocate for the sector.

MITA will initially work to develop operational capacity including development of a business plan, policies and procedures, website, sustainable funding etc. as well as hiring staff. In time, MITA may expand its role to focus on product development, marketing and advocacy initiatives in partnership with ITAC, Travel Manitoba and other groups.

Identifying and developing future leaders to support the MITA board as well as build the business and marketing capacity of the industry will also be key. Events that bring the sector together to celebrate successes, share ideas and grow together will be important for developing leadership skills.

Alignment with other stakeholder groups including First Nations, the federal government, provincial departments and other groups will be key to implementing the strategy and ensuring MITA and the industry are adequately resourced. Developing and implementing a stakeholder engagement strategy will be a fundamental part of this work.



Significant progress has been made on several important Leadership & Collaboration initiatives identified in the original strategy:

- The second annual Manitoba Indigenous Tourism Summit for business operators was held in September 2019 with over 50 participants
- Establishment of the Manitoba Indigenous Tourism Association in 2020



# Goals and Initiatives

## Strategic Goal 1: Leadership & Collaboration

Initiative	Timing		
	S	M	L
<b>Establish the Manitoba Indigenous Tourism Association</b> as the lead advocacy and development organization for Indigenous tourism in the province by identifying resources and developing a business plan.	■	■	■
<b>Establish a detailed work plan</b> between Travel Manitoba, ITAC and MITA to ensure a collaborative approach to industry development by March of each year.	■	■	■
<b>Develop an engagement strategy</b> with key stakeholder groups to ensure a coordinated approach to stabilizing and building the Indigenous tourism sector in Manitoba.		■	■
<b>Develop leadership capabilities</b> within the Indigenous tourism sector in Manitoba by hosting an annual event that builds leadership and showcases best practices and by hosting the International Indigenous Tourism Conference in 2022.	■	■	■
<b>Cultivate the development of MITA board members</b> with consideration of regional and sectoral representation.	■	■	■
<b>Advocate on behalf of the Indigenous tourism industry</b> in Manitoba to build awareness and support by: <ul style="list-style-type: none"> <li>i. Engaging with the Indigenous tourism sector in Manitoba to identify challenges, opportunities and issues. Ensure tourism businesses in all regions of the province are invited to provide input.</li> <li>ii. Developing a government/public support and awareness plan.</li> </ul>		■	■
<b>Encourage Indigenous representation</b> in key Manitoba tourism related steering committees, boards and organizations.	■	■	■
<span>■ Short-Term (&lt;1 year)</span> <span>■ Medium-Term (1-3 years)</span> <span>■ Long-Term (&gt;3 years)</span>			

## Key Performance Indicators

- Business plan developed for MITA
- Development of an annual work plan between Travel Manitoba, ITAC and MITA
- Development of an engagement strategy
- Number of participants at events
- Number of potential board members identified

# Goals and Initiatives

## 2

### **Experience Development – Develop the Tourism Readiness of Authentic Indigenous Tourism Experiences**

A major focus of the strategy is on retaining and building the capacity of the industry. Pre-pandemic, Manitoba had very few export-ready Indigenous tourism businesses and some of these are at risk because of border closures and restrictions. Many market-ready businesses are scattered throughout the province and not in close proximity to complementary experiences. Indigenous tourism experiences are often seen as a value-add, rather than the primary motivator for a trip. They often complement other items on an itinerary, including wildlife and nature experiences. While significant progress has been made on product development, work is needed to develop additional market-ready and export-ready businesses as well as to develop clusters of experiences that can be packaged and marketed together (both Indigenous and non-Indigenous). There is also an opportunity to develop Indigenous boulder experiences that could drive visitation as stand alone attractions. Potential boulder attractions currently in development are the Métis National Heritage Centre, Indian Residential School Museum and the Bannock Point Petroforms.

Indigenous tourism businesses in Manitoba face barriers that other tourism businesses do not, including access to capital, government funding and skilled labour. ITAC's hands-on approach to product development plays an important role in addressing barriers, however additional training and skill development is needed in areas like customer service and business management.

Building and maintaining trust is also fundamental to success in this area. Having Indigenous-led development and training initiatives will go a long way towards building the confidence needed to advance the industry.

As MITA evolves in the coming years, it may take a lead role in experience development. In the short-term, product development initiatives will continue to be led by ITAC in partnership with Travel Manitoba.

Significant progress has been made on several important Experience Development initiatives identified in the original strategy:

- Increase in market-ready and export-ready Indigenous tourism businesses from 28 to 42.
- Increase in Indigenous tourism businesses overall from 81 to 110.
- Over \$1 million in funding to Indigenous businesses in Manitoba for tourism development and COVID-19 recovery.

# Goals and Initiatives

## Strategic Goal 2: Experience Development

Initiative	Timing		
	S	M	L
<b>Identify and develop training programs</b> through partnerships to address product knowledge, customer service, business operations, management, human resources, financial knowledge and marketing skills.	■	■	■
<b>Stabilize existing businesses impacted by the pandemic.</b> During market recovery, retain, improve and develop new experiences with an aim to advance tourism readiness by: <ul style="list-style-type: none"> <li>i. Updating the inventory of Indigenous tourism experiences on an ongoing basis to support marketing, advocacy and product stabilization/development efforts.</li> <li>ii. Advocate for business supports and funding to aid business retention and recovery.</li> <li>iii. Support the development of 1-2 boulder experiences in the province that will appeal to international visitors.</li> <li>iv. Adopt national system of authentication of Indigenous tourism experiences.</li> </ul>	■	■	■
<b>Conduct economic impact assessments</b> of Manitoba's Indigenous tourism industry on a bi-annual basis including GDP, employment and revenue impacts. In 2021 conduct an in-depth assessment on the make-up of the industry and its needs.	■		■

■ Short-Term (<1 year)
■ Medium-Term (1-3 years)
■ Long-Term (>3 years)

## Key Performance Indicators

- Number of training programs implemented and number of participants
- Number of market- and export-ready Indigenous tourism experiences
- Authentication system adopted
- GDP, employment and revenue



# Goals and Initiatives

## 3

### Marketing – Share Our Stories

With the exception of Churchill operators, hunting lodges and fly-in fishing operations, Indigenous marketing initiatives are likely to focus predominantly on local and domestic markets in the short-term. Reduced long-haul travel during the pandemic recovery and the low level of tourism readiness in the province make short-haul domestic markets the best opportunity for recovery and growth.

Aligning communications under the *Adventure to Understanding* brand is also an important opportunity in both domestic and international markets. The brand will represent both consumer-facing marketing activities as well as the corporate identity of the Manitoba Indigenous Tourism Association.

While progress has been made in developing content marketing assets, additional work is needed in this area. Development of an inventory of Indigenous photographers, bloggers, writers, videographers, etc. would support the development of authentic content.

There is a need for additional domestic market research on the market potential of Indigenous tourism experiences in Manitoba to determine consumer targets, perceptions and expectations, as well as to identify product development opportunities. Domestic target markets would include both Indigenous travellers and non-Indigenous travellers with the need to identify key benefits and message positioning for each group.

As MITA evolves in the coming years, it may take a lead role in marketing to domestic audiences. In the short-term, marketing initiatives will continue to be led by ITAC and Travel Manitoba.

Significant progress has been made on several important Marketing initiatives identified in the original strategy:

- Development of the *Adventure to Understanding* brand in 2019
- Development of Indigenous tourism marketing content, including videos, photography, articles and a website landing page
- Promotion of Indigenous tourism experiences through blog posts and videos
- Three-day Indigenous program for international media
- Partnerships with Indigenous influencers and content creators



# Goals and Initiatives

## Strategic Goal 3: Marketing

### Initiative

### Timing

**Conduct market research** to better understand the potential of Manitoba Indigenous tourism products in domestic and international markets, including better defining target consumer segments and understanding perceptions and barriers.



**Align messaging and marketing initiatives under the *Adventure to Understanding* brand**, through development of a joint marketing plan between ITAC, MITA and Travel Manitoba on an annual basis.



**Identify and integrate with other existing tourism marketing initiatives**, including Destination Indigenous and Destination Canada so that Indigenous businesses in Manitoba can participate. Ensure that all export-ready experiences are included on the Destination Indigenous website on an annual basis.



**Continue to develop Manitoba Indigenous content assets** including photography, videos and articles. Develop an inventory of Indigenous content development talent.



**Develop new Indigenous-focused tourism itineraries, packages and partnerships** that encourage visitors to explore market-ready and export-ready experiences.



**Communicate the value of Indigenous tourism** to Indigenous communities, business leaders, government and the general public.



■ Short-Term (<1 year) ■ Medium-Term (1-3 years) ■ Long-Term (>3 years)

## Key Performance Indicators

- Completion of domestic market study on market potential of Indigenous tourism experiences in Manitoba
- Development of joint marketing plan on annual basis between Travel Manitoba, ITAC and MITA
- Number of Manitoba experiences added to Destination Indigenous and other platforms
- Number of content assets developed
- Number initiatives, packages and itineraries developed
- Development of public/government awareness plan and advocacy communication tools

# Goals and Initiatives

Travel Manitoba retained award-winning agency McKim Communications to create a brand that would represent both consumer-facing marketing and promotions as well as corporate communications for the new Manitoba Indigenous Tourism Association.

The brand, *Adventure to Understanding*, represents the bringing together of Indigenous cultures and their unique stories. There are seven birds, a symbolic number in many cultures that come together to make one. Between the birds, there are paths coming together in the middle to reinforce the idea of inclusion. *Adventure to Understanding* is a call to action to visitors who are interested in learning more about the Indigenous people in Manitoba and speaks to the Truth and Reconciliation's calls to action to bridge the knowledge gap between Indigenous people and non-Indigenous people. Capitalizing on this brand will be a key feature of future marketing initiatives.



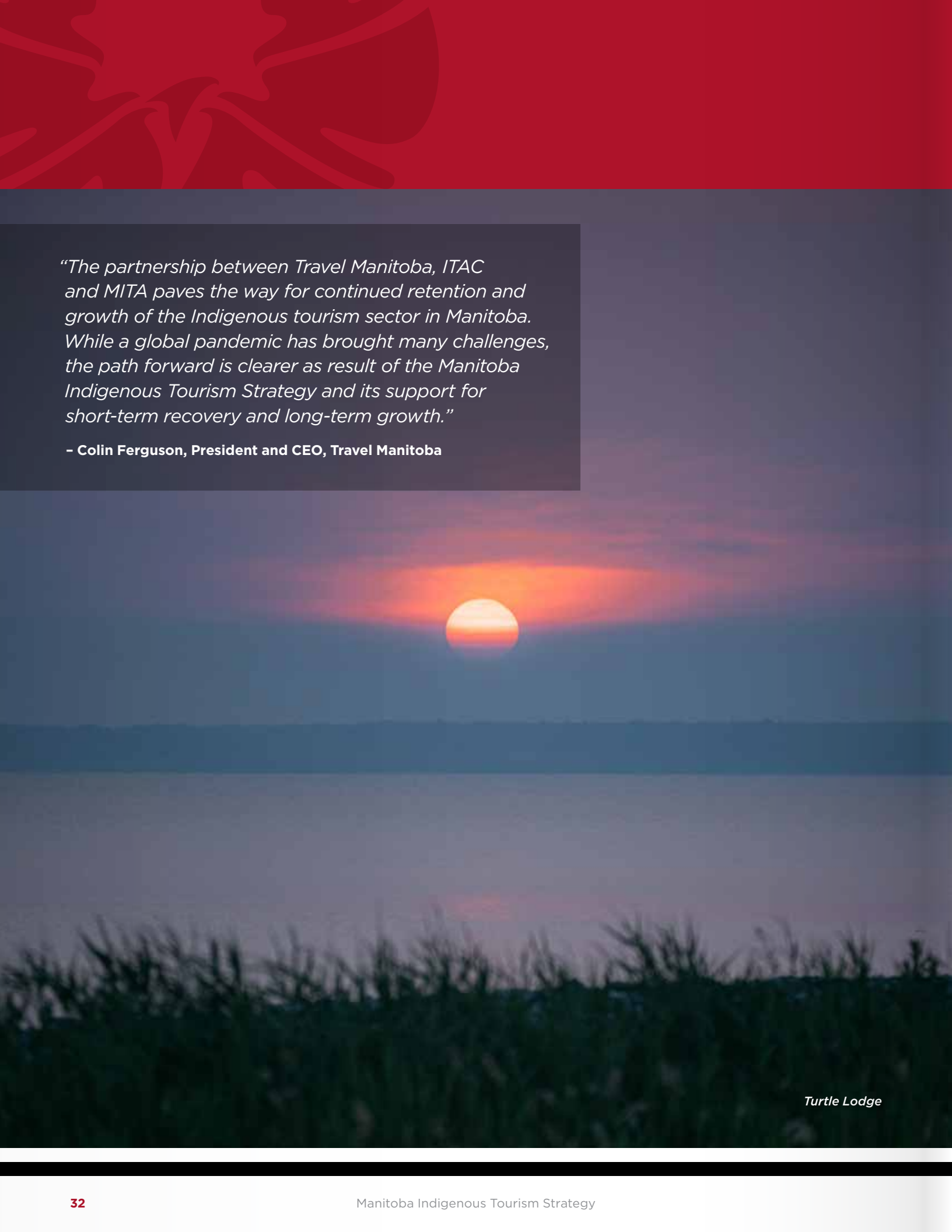
**ADVENTURE  
TO UNDERSTANDING**

Indigenous Tourism Manitoba



*National Indigenous Peoples Day, Thompson*



A full-page background image showing a sunset over a body of water. The sun is a bright orange circle on the horizon, with a long, horizontal orange glow extending across the sky. The sky transitions from orange near the horizon to a deep blue at the top. The water is a calm, light blue-grey. In the foreground, there are dark, silhouetted grasses or reeds. A dark red banner with a white floral pattern is at the top left.

*“The partnership between Travel Manitoba, ITAC and MITA paves the way for continued retention and growth of the Indigenous tourism sector in Manitoba. While a global pandemic has brought many challenges, the path forward is clearer as result of the Manitoba Indigenous Tourism Strategy and its support for short-term recovery and long-term growth.”*

**– Colin Ferguson, President and CEO, Travel Manitoba**

*Turtle Lodge*

# Next Steps

As MITA works over the coming years to carve out its role in developing and supporting the Indigenous tourism sector in Manitoba, undoubtedly the Manitoba Indigenous Tourism Strategy will require adjustment. The strategy will be reviewed annually by Travel Manitoba, MITA and ITAC, and will be updated as needed. An annual progress report will also be developed to track performance.



*Heritage North Museum, Thompson*



*Churchill*



*Spirit Way, Thompson*

# Appendix: Project Team

## **Manitoba Indigenous Tourism Association Board**

Dave Daley, Chair, Wapusk Adventures

Jason Gobeil, Dakota Ojibway Child & Family Services Inc.

Sky Bridges, The Winnipeg Foundation, Travel Manitoba Board of Directors

Edna Nabess, Cree-Ations

Lee Sinclair, Paskwayak Business Development Corp.

## **Indigenous Tourism Association of Canada Staff**

Keith Henry, President & CEO

Teresa Ryder, Director of Business Development

Holly Courchene, Indigenous Tourism Product Development Coordinator – Manitoba

## **Travel Manitoba Staff**

Colin Ferguson, President & CEO

Brigitte Sandron, Senior Vice President, Strategy and Business Development

Jackie Tenuta, Director, Strategy & Development

## **Blueprint Inc.**

Jamie Dumont, Associate





*Northern Manitoba Trappers Festival*

**Travel Manitoba**

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**TOURISM MANITOBA**  
Adventure to Understanding

