

MEMORANDUM OF UNDERSTANDING

Between Indigenous Tourism Association of Canada and Travel Manitoba

Progress Report 2020



INDIGENOUS
TOURISM ASSOCIATION OF CANADA

ASSOCIATION TOURISTIQUE
AUTOCHTONE
DU CANADA

Manitoba

CANADA'S HEART  BEATS



Table of Contents

Introduction	2
Background	2
Executive Summary — 2017-2020 Successes	5
Objectives & Results	6
Strategic Objective 1: Build Leadership Capacity	6
Strategic Objective 2: Support the Development of Existing and New Indigenous Tourism Experiences	13
Strategic Objective 3: Lead Marketing Excellence.....	18
Strategic Objective 4: Advance Partnerships to Grow the Indigenous Tourism Industry.....	22
Conclusion	23

Introduction

In 2017, Travel Manitoba and the Indigenous Tourism Association of Canada (ITAC) established a three-year Memorandum of Understanding to foster growth of the Indigenous tourism sector in the province. The MOU set out the foundation for partnerships with other organizations interested in advancing economic development and tourism growth that supports business communities throughout Manitoba.

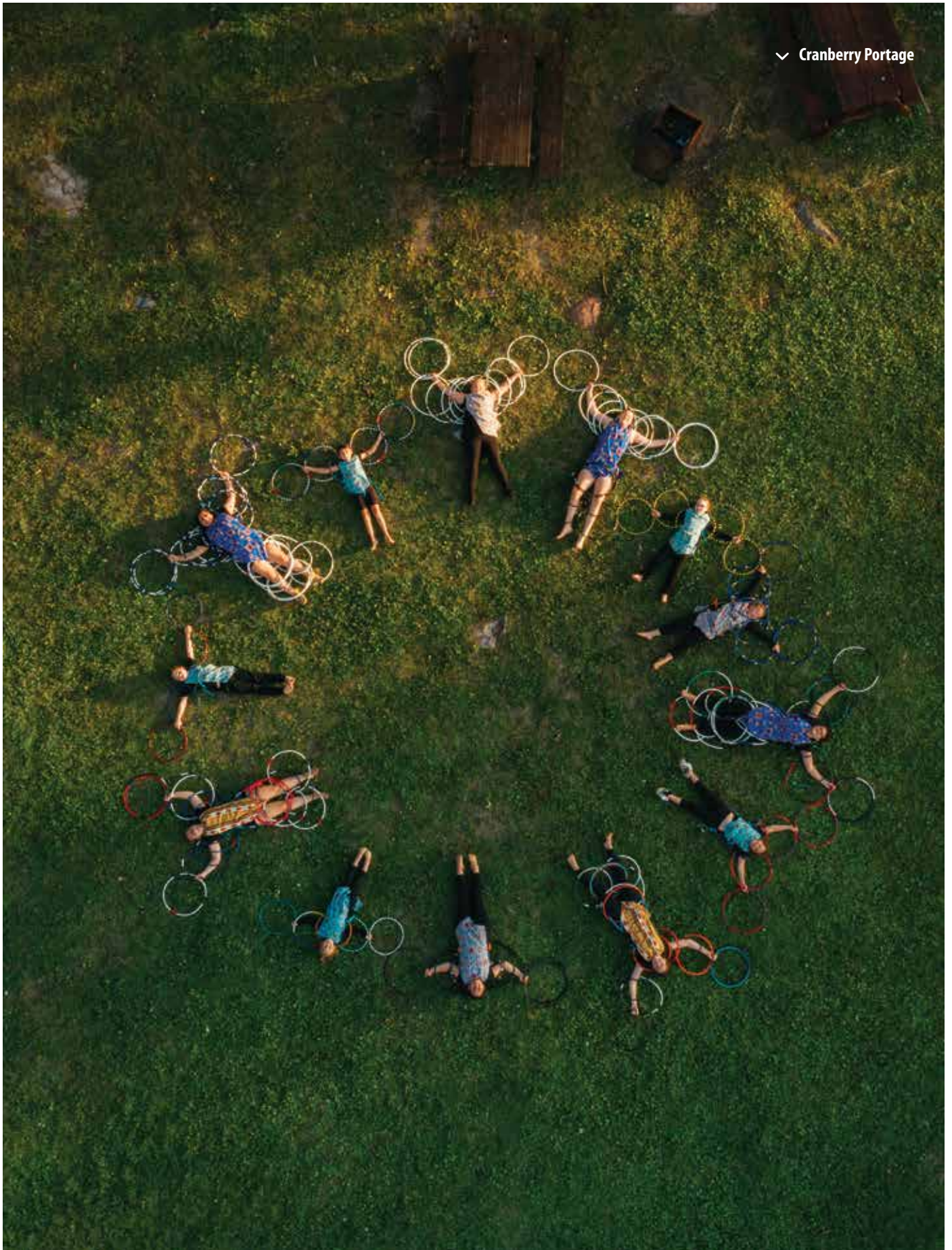
The impact of COVID-19 on Manitoba's Indigenous tourism sector is expected to be profound and pervasive. The situation is compounded by border restrictions and high overhead costs, leaving Indigenous tourism businesses vulnerable and highly affected by the pandemic. While this report focuses predominantly on successes achieved pre-COVID, some projects have been impacted by the pandemic. As the industry shifts short-term priorities to focus on recovery, some initiatives will see expedited progress, while others will be delayed. The MOU will be renewed in 2021 to reflect the progress made as well as the need for recovery based initiatives and revised targets.

Background

Manitoba is home to 63 First Nations communities and is the birthplace of the Métis Nation of Canada. More than 195,000 First Nation, Métis and Inuit people 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 they have high potential to be recognized as iconic Canadian tourism products that capture the attention of visitors from other countries. As the tourism marketing agency for the province of Manitoba, Travel Manitoba has a role in supporting Indigenous peoples in telling their stories to the world.

The Indigenous Tourism Association of Canada focuses on creating partnerships between associations, organizations, government departments and industry leaders from across Canada to support the growth of Indigenous tourism in Canada and address the demand for development and marketing of authentic Indigenous experiences. ITAC is a national member-based non-profit organization that supports the development of the Indigenous tourism industry in Canada through programs targeted to Indigenous owned or controlled tourism businesses at all stages of development as well as to existing and new regional Indigenous tourism associations.





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 MOU and the Indigenous tourism growth strategy in Manitoba. Specifically, Travel Manitoba and the Province of Manitoba acknowledge the need for leadership in responding to the following 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.

Travel Manitoba and the Indigenous Tourism Association of Canada are engaging partners to respond to these three calls to action.



Executive Summary — 2017–2020 Successes

Significant progress has been made under the framework of the ITAC-Travel Manitoba MOU:

- Four regional engagement sessions held in 2017, with additional Indigenous tourism summits held in 2018 and 2019 built connections with the Indigenous tourism sector in Manitoba, identified strategic opportunities and challenges, and addressed training and capacity building needs.
- Formation of the Manitoba Indigenous Tourism Advisory Committee in 2017 to provide direction to the MOU's implementation.
- Development and implementation of the Manitoba Indigenous Tourism Strategy — officially launched in April 2019.
- Support for Indigenous businesses and product development through the ITAC's Manitoba Tourism Product Development Coordinator position, resulting in an increase in market- 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 *Adventure to Understanding* brand in 2019.
- Establishment of the Manitoba Indigenous Tourism Association in 2020.

Objectives and Results

This section summarizes progress on specific objectives outlined in the MOU.

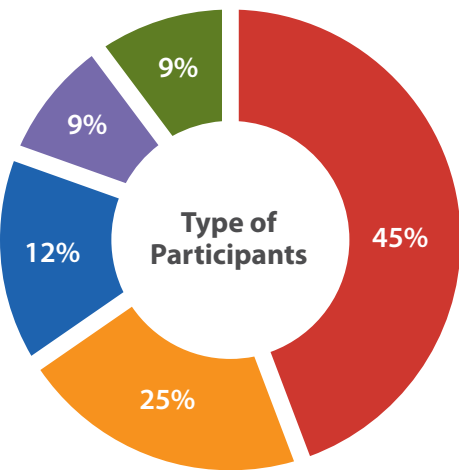
Strategic Objective 1: Build Leadership Capacity

1. Increase positive awareness of ITAC and Indigenous tourism experiences within the tourism industry and key industry stakeholders.

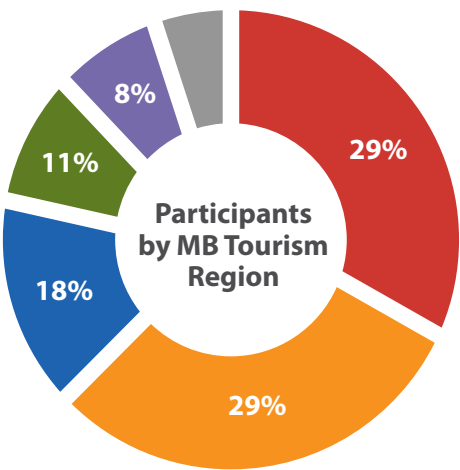
In 2017 and 2018, ITAC and Travel Manitoba set out on an ambitious consultation and engagement process with Indigenous tourism leaders in Manitoba as well as government and industry stakeholders.

Hosted Regional Engagement Sessions

Four regional engagement sessions were hosted in 2017 in Brokenhead Ojibway Nation, Dauphin, The Pas and Winnipeg, with a total of 89 participants from around the province.



- Indigenous Community
- Indigenous Entrepreneurs
- Non-Indigenous Tourism Operators
- Economic Development Agency
- Government



- Winnipeg
- North of 53
- Eastern
- Interlake
- Western
- Parkland

The sessions included round table introductions, presentations from ITAC, Travel Manitoba, local destination marketing organizations, First Peoples Economic Growth Fund and Community Futures. The regional sessions assisted in achieving the following:

- Identification of Indigenous tourism stakeholders and supporters:
 - Indigenous and Northern Relations
 - University College of the North
 - Brandon Urban Aboriginal Peoples Council
 - Parks Canada — Riding Mountain National Park
 - Anishinaabe Agowidiwinan
 - Anishinaabe Youth Culture Camp
- Identification of Indigenous tourism businesses, entrepreneurs and community representatives interested in learning more about the opportunities in Indigenous tourism.
- Active discussion with the participants to identify key issues, concerns, opportunities and support needs.

Key Feedback Takeaways



Hosted Manitoba Indigenous Tourism Summits

More than 100 delegates attended the first annual Power of Indigenous Tourism Summit held in June 2018 in Winnipeg. The summit was a joint venture between the ITAC and Travel Manitoba.

Attendees explored areas of development, marketing and authenticity of Indigenous tourism in Manitoba through workshops and presentations by Indigenous tourism experts from across Canada. Attendees reviewed findings of a recent research project by ITAC and Travel Manitoba, which identified more than 50 Indigenous tourism businesses in Manitoba and outlined opportunities from an industry perspective. Facilitated discussions resulting in the industry prioritizing festivals, wildlife viewing, land-based activities, culinary and immersive cultural experiences as those with the biggest opportunities for growth for Manitoba, while describing Indigenous tourism in Manitoba as authentic, strong, respectful, welcoming and passionate.

The second annual Manitoba Indigenous Tourism Summit for business operators from across Manitoba was held in September 2019 in Winnipeg with over 50 participants. A highlight of the session was an exercise with Indigenous experience providers and tour operators/receptives grouped by region to develop multi-day Indigenous tourism itineraries. Groups outlined how existing products (and new products) could be developed in the future and how they could be packaged to be sold to visitors.

Host Manitoba Day at the International Indigenous Tourism Conference in 2020

Manitoba was scheduled to host the next International Indigenous Tourism Conference (IITC) in Winnipeg in September 2020. Travel Manitoba promoted Manitoba at the 2019 event in Kelowna B.C. as the next host of the IITC. An official announcement took place, which included a promotional video and Manitoban Indigenous entertainment, which generated tremendous excitement. Significant progress was made on developing the Manitoba conference program before the conference was postponed until 2022 due to COVID-19.





2. Build the capacity of the Indigenous tourism industry in Manitoba by working towards the establishment of an Indigenous Tourism Association in Manitoba by 2020.

Established an Indigenous Tourism Advisory Committee

The Manitoba Indigenous Tourism Advisory Committee (MITAC) was established in December 2017. Participants on the committee were identified through the regional engagement sessions as champions of Indigenous tourism in their region. Terms of reference were set out for the committee outlining responsibilities of the committee members, Travel Manitoba and ITAC with the overall goal of providing strategic direction, guidance and recommendations on how to advance Indigenous tourism in Manitoba. Since its inception, MITAC held eight meetings to support project work ongoing in the province.

Manitoba Indigenous Tourism Advisory Committee Members:

- David Daley, Committee Chair, Wapusk Adventures
- Carl Smith, Brokenhead Sky Wind Tour
- Christa Bruneau-Gunther, Feast Café Bistro
- Sophia Rabiauskas, Sagatay Enterprises Inc.
- Desmond Mentuck, Riding Mountain National Park Interpretation Officer
- Jason Gobeil, Aboriginal Community Coordinator at City of Brandon and Brandon Urban
- Aboriginal Peoples Council
- Sky Bridges, Aboriginal Peoples Television Network, Travel Manitoba Board of Directors

Overview of the Manitoba Indigenous Tourism Strategy

Development of the Manitoba Indigenous Tourism Strategy was based on industry input from the regional engagement sessions as well as direction from the Manitoba Indigenous Tourism Advisory Committee. The Manitoba Indigenous Tourism Strategy was officially launched in April 2019.

Goals

- Increase the number of market- and export-ready Indigenous-owned tourism businesses from 28 to 38 by 2021.
- Reach 85 authentic Indigenous tourism businesses in Manitoba by 2023–24.
- Increase number of Indigenous tourism jobs from 1,359 full-time year-round jobs by 4% to 1,652 by 2023–24.
- Increase Indigenous tourism revenues' economic output and contribution to GDP by 2023–24 by 4%.

Mission

Telling Our Stories, Growing the Indigenous Tourism Economy in Manitoba.

Vision

A prosperous Indigenous tourism industry across Manitoba, providing authentic, unique, engaging experiences.

Strategic Priorities

- Leadership: Identifying our partners, roles and responsibilities, resources, research requirements, investment sources and opportunities.
- Product Development: Improving accessibility, building capacity, developing market- and export-ready experiences, supporting services and amenities.
- Marketing: Establishing positioning and marketing strategy, coordinating communications for advocacy and awareness, performance measures, ensuring return on our investment.

Given the progress made on the strategy and impact of COVID-19, the strategy will be updated in 2021 to reflect the need for recovery based initiatives and revised targets.

Established the Manitoba Indigenous Tourism Association

In September 2019, the Manitoba Indigenous Tourism Advisory Committee determined that they would dissolve with the goal of forming a non-profit Manitoba Indigenous Tourism Association for the province. The association was officially formed in September 2020. Work remains to establish the role of the organization, funding and staff.

Inaugural Manitoba Indigenous Tourism Association Board Members:

- Dave Daley, Wapusk Adventures — Chair
- Jason Gobeil, Dakota Ojibway Child & Family Services Inc., Manitoba Tourism Strategy Steering Committee
- Sky Bridges, Aboriginal Peoples Television Network, Travel Manitoba Board of Directors
- Edna Nabess, Cree-Ations
- Lee Sinclair, Paskwayak Business Development Corp.

3. Confirm a three-year funding commitment of \$350,000 to mutually agreed upon activities that support the achievement of goals and objectives.

Through partnered activities, the overall commitment from Travel Manitoba and ITAC is \$1,290,000 through fiscal year 2020–21, however, due to the postponement of the International Indigenous Tourism Conference, a portion of this commitment will not be fully expended until 2022.



Strategic Objective 2: Support the Development of Existing and New Indigenous Tourism Experiences

1. Ensure Indigenous tourism stakeholders have access to tourism training and capacity development through organizations such as Tourism Human Resources Canada, the Manitoba Tourism Education Council, the University of Winnipeg, Red River College and the University College of the North.

University College of the North (UCN) has been conducting tourism related training in Swan River, The Pas and Flin Flon in association with Manitoba Tourism Education Council (MTEC). UCN is also conducting small business training in Thompson, The Pas and Swan River. While this training is not Indigenous specific, there is significant Indigenous representation in these regions.

Travel Manitoba and ITAC's Manitoba Tourism Product Development Coordinator works with entrepreneurs to provide product development and training advice in partnership with Regional Economic Development Corporations. Travel Manitoba also produced the *Exploring Tourism: Opportunities for Entrepreneurs* booklet, which provides recommendations on starting a tourism business as well as lists funding support programs.

Community Economic Development Officers in Northern Manitoba participated in Experiential Tourism Training Sessions in October 2020, which included a focus on Indigenous tourism development with support from ITAC and Travel Manitoba. This training will enhance the support for Indigenous communities and entrepreneurs interested in developing tourism experiences in the North.



^ North End Winnipeg Mural



^ Winnipeg Art Gallery

2. Grow industry relationships that drive Indigenous tourism development and growth

Set benchmarks through research

In March 2018, Probe Research was contracted to conduct a two-phase research project to better understand the Indigenous tourism industry in Manitoba. Probe completed an inventory of majority-owned Indigenous tourism operators, including 56 businesses. The second phase of the research included in-depth interviews with 12 operators to gather insights into growth and visitation patterns, expectations for the future, barriers to market expansion, views of the Indigenous tourism industry in general and support needed from ITAC and Travel Manitoba.

In addition to the research done in Manitoba by Probe Research, ITAC worked with the Conference Board of Canada in 2018 to evaluate the economic impact of the Indigenous tourism economy. The study, Canada’s Indigenous Tourism Sector - Insights and Economic Impacts, included the number of jobs, the overall number of market- and export-ready businesses and the contribution to the Canadian GDP.

The Manitoba specific findings of this research are summarized below.

Economic Impact

Businesses

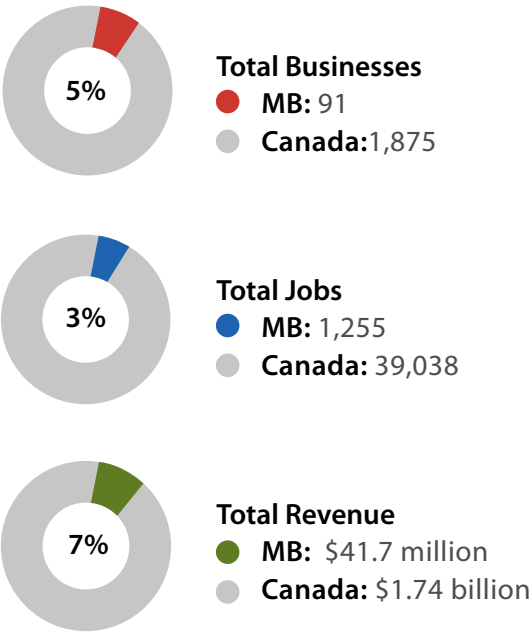
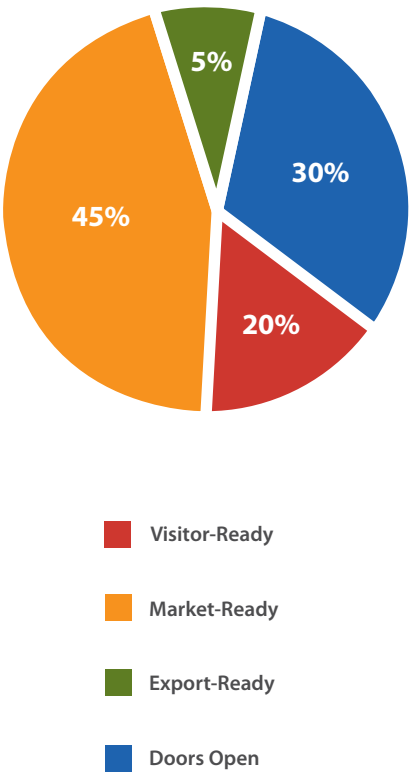
The indigenous tourism industry in Manitoba has seen a 44% increase in businesses since 2014.

Jobs

Manitoba's 91 indigenous-owned tourism businesses have created over 1,200 directly employed people.

Revenue

The Indigenous tourism industry in Manitoba generated over \$41 million in GPD in 2017.



In 2020, the Conference Board of Canada updated data on the Canadian economic footprint of the Indigenous tourism sector for 2019 with forecasts for 2020 COVID-19 impact. For 2020, the Conference Board of Canada is projecting a 65.9% decline in direct GDP and a 59.4% decline in employment for the Indigenous Tourism Sector in Canada.

Key Measures for the Indigenous tourism Sector in Canada

Measures	Revised 2017 Estimates	2019 Estimates	2020 Estimates
Direct Employment (Peak Employment)	35.0k	36.0k	14.6k
Direct GDP	\$1.5B	\$1.6B	\$555M

Source: The Conference Board of Canada

Develop new and improved existing Indigenous tourism experiences

Travel Manitoba and ITAC have contracted the services of a Manitoba Indigenous Tourism Product Development Coordinator. This role is responsible for supporting Indigenous business owners in further developing their experiences to increase the level of market- or export-readiness. The overall goal of this position is to grow the number of market- or export-ready Indigenous tourism businesses that are owned by the community and individual entrepreneurs.

This work has been done through one-on-one assessments of businesses. Outreach to the businesses has identified gaps that the coordinator and the business owners are working to address. As a result of these efforts, progress has been made on the number of export-ready and visitor-ready Indigenous tourism businesses in Manitoba.

Number of Authentic Indigenous Tourism Experiences in Manitoba

	2018–19	2019–20	2020–21
Export-Ready	3	8	8
Market-Ready	25	25	34
Visitor-Ready	13	19	27
Doors Open	17	17	17
Pow Wow Events	24	24	24



^ Manito Ahbee Festival

3. Provide access to funding that supports the development and marketing of Indigenous tourism businesses.

Invest in Product Development and Marketing

ITAC invests annually in a market-readiness micro-grant program. This program assists business owners with small amounts of capital to support their business in becoming more market- or export-ready. Requests for support under the micro-grant program include training, infrastructure upgrading, marketing materials, and support with pricing and packaging.

In 2020, ITAC launched the COVID-19 Stimulus Development Fund to support Canada's Indigenous tourism sector during the pandemic crisis and through recovery. To date, over \$1 million in direct support for Indigenous tourism experiences in Manitoba has been allocated through this program.

	Number of Applicants	Total Amount of Grants Requested	Number of Applicants Supported	Total Amount Granted
2017-18	4	\$40,000	2	\$17,000
2018-19	8	\$76,700	6	\$35,400
2019-20	10	\$100,000	4	\$19,000
2020-21 (COVID Stimulus Fund)	44	\$1,030,610	42	\$968,110
TOTAL	66	\$1,247,310	54	\$1,039,510

3. Maximize consumer engagement from relevant, personalized audiences across digital platforms owned by ITAC, Travel Manitoba and key influencers.

Place emphasis on creating and sharing content

Travel Manitoba and ITAC partnered to tell stories to visitors about the possibility of adding an Indigenous experience to their itinerary while travelling. Travel Manitoba highlighted Indigenous experiences through blog posts and video to inspire visitors and explain the Indigenous roots of the province. These blog posts include a variety of festivals, culinary experiences, events and hands-on experiences for visitors.

This partnership also resulted in the creation of two videos. The first tells the story of Buffalo Point Resort, their collection of wild rice and how this contributes to a visitor experience. A second video showcases Feast Café Bistro's role in sharing culture through food. Two additional videos are planned for 2020–21 including a general Indigenous tourism in Manitoba video and a video of Wat'chee Lodge during polar bear denning season.

Travel Manitoba developed an Indigenous experiences landing page on the Travel Manitoba website to showcase Manitoba's unique Indigenous experiences which includes links to videos and blog posts.

In partnership with Indigenous Tourism Association of Canada and Destination Canada, Travel Manitoba hosted four international travel media on a 3-day group trip from August 15–18, 2019 titled "Indigenous Winnipeg: Arts, Cultures and Spirit."

Additionally throughout 2019–20, Travel Manitoba hosted approximately 10 individual travel media seeking Indigenous-themed stories such as Feast Café Bistro, the Inuit Art Centre, Urban Shaman Gallery, Anne Mulaire fashion designer and more.



Travel Manitoba has also engaged more local Indigenous influencers/content creators - like Shanley Spence (@dawn.woman) and Alan Poelman (@alftown) - to share Manitoba travel experiences from their perspective on their social channels.

The following are some earned media results about Indigenous experiences, published as a result of Travel Manitoba's media efforts:

"Can Indigenous Knowledge Move the Fashion Industry Forward?" published online by *Harper's Bazaar*

"Winnipeg, Manitoba: the prairie city is a hub for exploring Indigenous artistic expression" published online by *The Globe and Mail*

"The Canadian chef putting Indigenous food on the menu" published online by *The Culture Trip*

"8 guides and tours to honour Indigenous cultures" published online by *Outside* magazine.

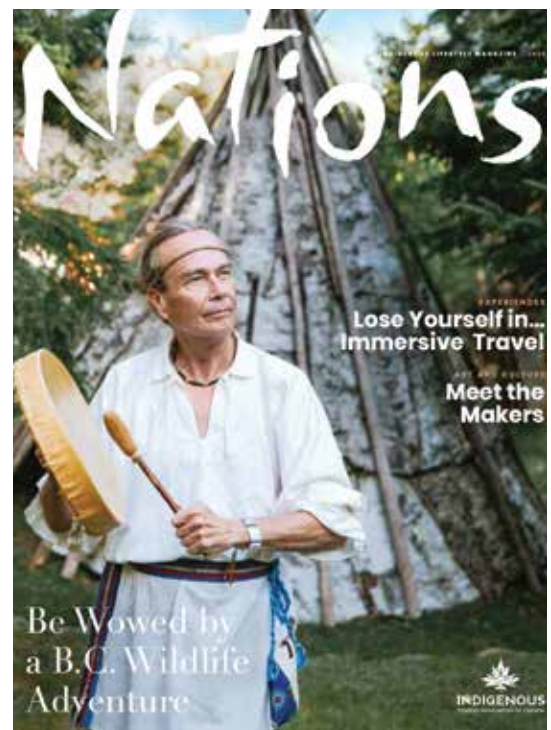
"Indigenous cuisine at Winnipeg's Feast Cafe and Bistro" published online by *CARP* magazine.

Leverage ITAC marketing and promotion

ITAC is a membership-based organization. As part of the benefits offered to members, a listing is created for each of the Indigenous-owned businesses across Canada.

ITAC recognizes that it is important to create a stronger call to action about Manitoba Indigenous experiences. Included on its website are one- and multi-day itineraries featuring packages from various operators. As this work evolves and more Indigenous experiences are developed in Manitoba, more opportunities to sell Indigenous tourism packages will be made available to operators.

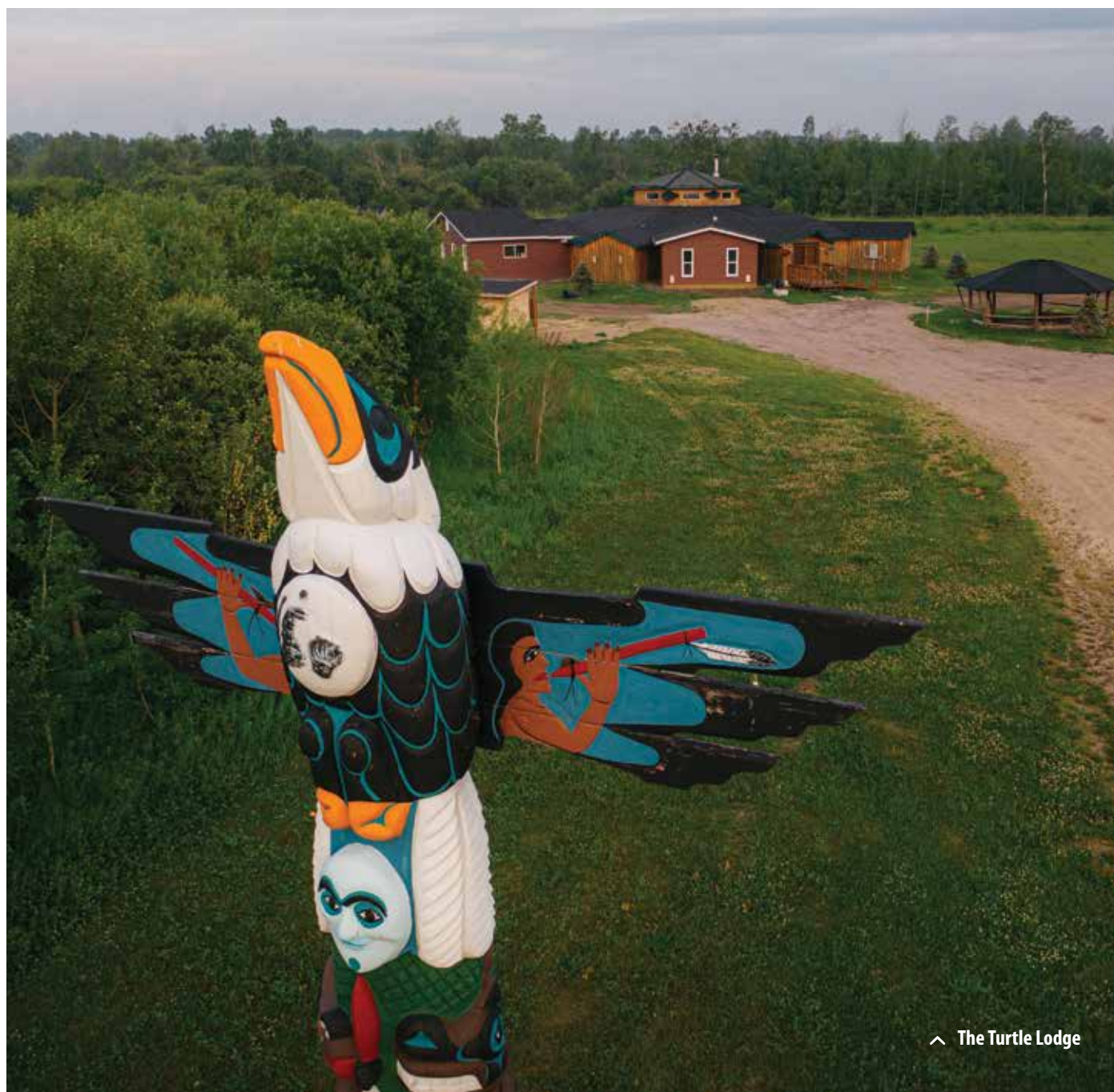
Manitoba operators are included in *Nations*, ITAC's lifestyle magazine.



4. Foster a culture of pride amongst Manitobans encouraging residents and business to speak positively about Indigenous tourism experiences in Manitoba as well as the Indigenous tourism association of Canada.

Execute Value of Tourism campaign

Travel Manitoba ran a radio campaign in May 2019, highlighting the value of tourism message across the province. Ads promoting the importance of tourism as an economic generator and job creator were produced specifically for the Northern region — where a high percentage of the population is Indigenous. In addition, these ads were translated and aired in Cree.



Strategic Objective 4: Advance Partnerships to Grow the Indigenous Tourism Industry

1. Leverage mutually beneficial partnerships with tourism industry stakeholders participating in marketing, experience development, advocacy and research.

A significant initiative identified in the MOU was to develop and market Manitoba Indigenous tourism experiences to commemorate the province's 150th anniversary in 2020. Due to COVID-19, all Manitoba 150 initiatives have been paused until 2021.

2. Increase membership in the Indigenous Tourism Association of Canada

ITAC membership by companies and organizations based in Manitoba has increased significantly over the course of the MOU's implementation. In 2019–20, ITAC had five voting members (Indigenous-owned tourism companies) and 20 non-voting members. In 2020–21, this has increased to a total of 38 members.

ITAC Membership Category	2019–20	2020–21
Voting Members (Indigenous owned business)		
Export-Ready	5	5
Market-Ready		13
Visitor-Ready		7
Non-Voting Members	20	13
TOTAL	25	38







Conclusion

In order to continue to meet and exceed the goals and expectations outlined in the ITAC/Travel Manitoba MOU, key issues arising from the COVID-19 pandemic will need to be addressed and new opportunities for growth must be identified. Both the MOU and Manitoba Indigenous Tourism Strategy will be updated in 2020–21 to reflect the evolution of the industry and need for recovery.

The strong partnership between Travel Manitoba and the Indigenous Tourism Association of Canada will ensure an updated MOU and Manitoba Indigenous Tourism Strategy are positioned to support Indigenous tourism growth that benefits not only the sector and visitors, but all residents of Manitoba through enhanced tourism offerings, economic development opportunities and emphasis on reconciliation.



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