



Indigenous Tourism Experiences:

Creating Opportunities in Saskatchewan Export Markets



Dakota Dunes Golf Links

BACKGROUND

Across Canada, Indigenous tourism generates \$2.7 billion in gross economic output, \$1.4 billion in GDP and more than \$142 million in taxes.¹ The sector employs over 39,000 Canadians.²

Indigenous tourism and business development present significant growth opportunities for Saskatchewan's economy. However, challenges exist in that Saskatchewan is a lesser-known destination and not often top-of-mind for international travellers. With these challenges in mind, Tourism Saskatchewan partnered with the province's first Indigenous Tourism Corridor on a research project.

Insightrix Research was hired to conduct a qualitative research study with key travel markets to gauge interest in Indigenous tourism experiences in Saskatchewan. The study's goals were to gain a better understanding of Saskatchewan's export markets; identify unique Indigenous tourism experiences that interest prospective long-haul and international visitors; and gather first impressions about travel to Saskatchewan.

PARTNERS

Tourism Saskatchewan

Tourism Saskatchewan is a Treasury Board Crown Corporation. It is responsible for marketing Saskatchewan as a destination; assisting the development of tourism products and experiences; and delivering tourism education and training to build a robust workforce.

Indigenous Tourism Corridor

Beardy's & Okemasis' Cree Nation, Wanuskewin and Whitecap Dakota First Nation are partners in Saskatchewan's first Indigenous Tourism Corridor. The corridor establishes a cluster of Indigenous experiences "connected by history, community, land, river and highway." These experiences will form larger, packaged experiences that will appeal to both domestic and export markets.

Insightrix Research Inc.

Insightrix Research Inc., based in Saskatoon, provides consulting services in study design, questionnaire development, data collection, qualitative services, and data. Insightrix employs 35 full-time professional staff in research and consulting, programming, data services, sample management and coding.

1. Government of Canada. *Canada's Tourism Vision, 2017*. <https://www.ic.gc.ca/eic/site/095.nsf/eng/00002.html>.

2. Conference Board of Canada. *Canada's Indigenous Tourism Sector: Insights and Economic Impacts, 2018*.

METHODOLOGY

North American and European Focus Groups

Six online chat-based focus groups were held with English-speaking international travellers living in Tourism Saskatchewan's key markets: Canada (short-haul and long-haul), Germany, U.K. and U.S. (short haul and long-haul). Focus groups took place in August 2019 and each consisted of eight to 10 participants. Each participant received an honorarium of \$100 CAD.

Inshatrix Research chose study participants through a screening tool based on Destination Canada's Explorer Quotient (EQ), which groups travellers into specific segments based on given criteria (e.g. demographics, geography, psychological factors).

"Learners" and "Free Spirits" were identified as the EQ segments with the greatest interest in participating in Indigenous tourism experiences. These choices were based on information in *2019 Market Snapshots: Understanding the Opportunity for Indigenous Tourism Business in Canada*, compiled by Destination Canada and the Indigenous Tourism Association of Canada (ITAC).³ The resource breaks down the Indigenous tourism opportunity for each international market.

For the purposes of this study, potential focus group participants were asked to select a statement from the following list that best describes their travel preferences:

- I like to immerse myself in the local culture, people and ambience of the places I visit. [Learners]
- I seek out adventure and will try anything at least once. [Free Spirits]
- Travel for me is all part of escaping the schedule and routine back home. I want to return from my travels feeling relaxed and refreshed. [Escapist]
- I prefer the comforts of home to the uncertainties of new places and cultural differences. [Familiarity Seeker]
- None of these statements apply

These screener statements were modified for different markets, as appropriate. People who identified as a "Learner" or "Free Spirit," and demonstrated a strong interest in visiting Canada, were selected to participate in the study.

During the online focus groups, moderators presented participants with a series of images and videos showcasing Indigenous experiences currently in development in the Saskatoon area. Participants were asked questions to gauge their level of interest in the presented content and experiences. Feedback on marketing materials and proposed experience offerings was also collected.

Chinese Tour Operator Interviews

Eight in-depth interviews were conducted with Chinese tour operators in September-October 2019. All interviews were conducted in English with participants in a decision-making capacity within their organization.

Tourism Saskatchewan provided a list of operators to include in the study. Most manage inbound Chinese visitors from mainland China and domestic Chinese visitors from within Canada. Some of the operators participated in a recent familiarization (FAM) tour organized by Tourism Saskatchewan, which included an Indigenous experience.

Findings and Recommendations

Tourism Saskatchewan communicated findings and recommendations from the study in a two-part series published in its industry newsletter *Going Places*. Highlights of those chapters are presented, as follows, along with additional insights gathered during the research.

3. Destination Canada and Indigenous Tourism Association of Canada, *2019 Market Snapshots: Understanding the Opportunity for Indigenous Tourism Business in Canada*. <https://indigenoustourism.ca/corporate/wp-content/uploads/2018/11/2019-Market-Snapshots-Destination-Canada.pdf>

PART ONE: GOALS, OBSERVATIONS AND MARKET PERCEPTIONS

The study's goals were to gain a better understanding of Saskatchewan's export markets; identify Indigenous tourism experiences that interest prospective long-haul and international visitors; and gather top-of-mind impressions about travel to Saskatchewan.

Previous research was undertaken by Destination Canada and ITAC. It found that despite unfamiliarity with Indigenous culture and history in Canada, prospective overseas travellers are interested in incorporating Indigenous experiences into their trips. The new study sheds light on misconceptions and conflicting views of authenticity.

Authenticity matters, but what does it mean?

Authenticity is important and socially desirable for travellers seeking cultural experiences; however, the term is subjective. Lack of knowledge of a destination's history and culture shapes biased views of authenticity based on stereotypical or romanticized images.

"I grew up on cowboy and Indian films and only realized many years later that the American native was the true hero. Living in harmony with the earth." – U.K. participant

Focus group participants expressed concern about ownership of Indigenous tourism attractions and the primary beneficiaries. They questioned whether commoditization resulting from tourism exploits local Indigenous communities. Prospective travellers want assurance that the money they spend goes back to Indigenous people. This was clearly stated by North American markets (Canada and U.S.) and in the German market. Focus group participants also wanted to know that their participation in tourism experiences is respectful to Indigenous people.

"I would be worried about overstepping the line of learning about, appreciating, and honoring Indigenous culture into appropriating it or treating it as a spectacle." – Canadian participant, long-haul market

Overseas markets share a lack of general knowledge of Canadian and Indigenous history. Misunderstandings about Indigenous culture fuel perceptions of inauthenticity when travellers are presented with Indigenous tourism opportunities. German focus group participants were particularly skeptical. They resisted imagery that they considered "touristy" or geared towards large tourist groups. Many had inaccurate preconceptions of what defines authentic Indigenous experiences. Imagery of Indigenous individuals wearing non-traditional clothing or participating in more modern cultural elements, such as playing guitar or golfing, triggered sharp criticism from participants.

While the importance of authentic Indigenous tourism experiences noted in the North American and European focus groups is very high, Chinese travellers had a different outlook. The tour operators who participated did not express authenticity concerns regarding Indigenous tourism imagery and experience concepts, unlike findings from the focus groups.

"Authenticity? Yes, if it gives a better experience to the customers but it's really not the most important part." – Chinese tour operator

Indigenous – a misunderstood term

The word "Indigenous" caused confusion among the overseas participants. Many were unfamiliar with its use as referring to the people who inhabited Canada prior to European contact and settlement. In fact, some believe Indigenous refers to all Canadians or think of the word in more general terms, not limited to Canadian geography.

Canadian and long-haul U.S. participants had sufficient knowledge about Indigenous and Native American history, suggesting strong interest in Saskatchewan Indigenous experiences. Conversely, short-haul U.S. participants expressed low interest due to perceptions that similar landscapes and Indigenous experiences are available locally.

While Canada is a top destination for many overseas participants, Saskatchewan is not top-of-mind. Unlike North Americans, the U.K. and German participants did not distinguish Indigenous tourism from general tourism in Canada. Overseas travellers desire a holistic Canadian experience, which encompasses both Indigenous and non-Indigenous attractions.



Awareness of Indigenous history and culture is limited among Chinese tour operators. Tour operators at best have general knowledge regarding Indigenous history and culture. Operators expect knowledge among their customers is very weak and as a result, Indigenous experiences would be considered an “add-on” to their Canadian travel experience.

What does the word ‘Indigenous’ mean to you?

- “Early European Settler” – U.K. participant
- “For me, the complete Canadian population. Everyone who is born in Canada” – German participant
- “My first thought would be those neighbours in Alaska and Australia described as Indigenous people” – U.S. participant

Advice and Recommendations

- **Education is key to promoting Indigenous tourism in export markets.** Overseas travellers are unfamiliar with or may have misconceptions of Canadian Indigenous history and culture. A combination of education and use of more familiar terms may be necessary in marketing materials.
- **Create separate marketing strategies for domestic and international markets.** North American markets have greater familiarity with Indigenous history and culture, which translates into a high level of interest for visitation to Saskatchewan. Among overseas travellers, there is interest in visiting Canada but Saskatchewan remains unknown.
- **Design marketing materials to convey authenticity and avoid visuals that appear staged or enterprise-driven.** One of the most significant marketing challenges for the Indigenous tourism industry will be to appeal to the expectations of overseas travellers, while presenting experiences in a way that maintains the integrity and truthfulness of the cultural content. This will be of particular importance when marketing in the U.K. and Germany.
- **Consider the appetite for holistic Canadian experiences among international travellers.** It is important to consider developing partnerships with other Indigenous and non-Indigenous operators in other parts of the country. The goal could be to include Saskatchewan experiences on a province-hopping, multi-week itinerary.

PART TWO: EXPERIENCE DEVELOPMENT AND PACKAGING FOR EXPORT MARKETS

The study yielded valuable insights to assist the development and packaging of Indigenous tourism experiences in Saskatchewan.

Activities and experiences

Prospective travellers are most interested in activities that demand low to moderate physical effort. Traditional cooking, stargazing, guided hiking tours, arts and crafts, powwows and horseback riding are popular choices among tourists from all regions, if presented in an experiential way. While U.S. and European markets expressed interest in canoeing, Chinese tour operators advised against including water activities in tour packages offered to Chinese travellers.

"[I] want to explore while on holidays, but don't want to come home exhausted." – U.K. participant

Across all markets, there was a strong desire to participate in one-on-one conversations with Indigenous people and listen to storytelling in order to better understand Indigenous culture and history. Interactive and participatory activities, such as traditional dancing and tipi raising, have strong appeal in the Chinese market. To overcome language barriers, engaging a local interpreter who can translate into Mandarin is viewed as essential to the Chinese market. This is especially important when providing guided tours or storytelling.

All markets expressed an interest in experiencing multiple activities in a particular region, rather than having a singular focus. An urban centre can serve as a destination hub that offers experiences complementary to rural Indigenous attractions. Showcasing tourism opportunities in nearby Saskatchewan cities was a clear draw in North American and European markets.

"I like the idea that you can spend time in the great outdoors amongst all the history and culture. But then, you've got a bustling small city with all the activities and things we're quite reliant on. But I like the idea of getting away for a few days to explore and just kind of hide away from things" – U.K. participant

Accommodation, transportation and cuisine

Prospective travellers from all regions desire diverse accommodation options. Indigenous-inspired luxury hotels, modern tipi-inspired structures, and camping/glamping facilities appeal to all markets. Many participants were interested in spending one or two nights at a luxury hotel and an additional night or two in a modern tipi-inspired or traditional tipi accommodation. About half of focus group participants expressed interest in a one- to two-night stay in a traditional tipi, though comfort and safety (i.e. protection from wildlife) were cited as important considerations. While authenticity is a main selling feature of the tipi experience, comfortable bedding and bathroom amenities are expected, even by the most adventurous travellers.

"Make it real, but make it comfy" – U.S. (long-haul) participant

"I need to feel safe, clean and comfy; it's my holiday" – German participant

In U.S. and European markets, rental cars are generally preferred over included or pre-arranged transportation. The freedom to explore and travel "off of the beaten path" was highly valued among focus group participants. Interviews conducted with tour operators determined that Chinese long-haul travellers prefer pre-arranged, organized transportation.

Local and authentic food and beverage options are of interest to all markets included in the study. These activities are appreciated as ways of engaging with the local culture. Interest is high for flavourful food that is unique to Indigenous culture and reflective of local ingredients. Having a selection of menu items to choose from was identified as important in the U.K. focus group and during Chinese tour operator interviews. Serving hot food (i.e. avoiding sandwiches, cold cuts and salads) is important to the Chinese market.

"[Local cuisine] is very important! You get to know people and culture through their cuisine." – German participant



Wanuskewin



Packaging

Interest in purchasing Indigenous tourism packages and group travel options was generally low among European and North American focus group participants. Most German and U.S. participants said that they prefer the ability to pick and choose various activities. However, package options and group travel were appealing to the Chinese market and select U.K. travellers, due to unfamiliarity with the region and the convenience that tourism packages offer.

Only three out of eight Chinese tour operators who were interviewed had knowledge of Indigenous tourism and experience promoting it as a product to their customers. Due to this limited familiarity, Indigenous experiences alone are reportedly not a major draw for potential Chinese tourists.

When developing packages for the Chinese market, the tour operators interviewed in this study strongly recommended including non-Indigenous attractions as part of the offer. Attractive options may range from experiencing the healing mineral waters of Little Manitou Lake (Watrous-Manitou region) or visiting a working farm. Participating operators recommended two to three day tour packages for Chinese travellers.

These tour operators typically build tour plans for their customers and work with a local guide to address on-the-ground logistics. The key to packaging for the Chinese market is to build solid relationships with tour operators eager to promote Saskatchewan's Indigenous tourism offerings.

"We build tour plans for our customers. We provide travel arrangements and also work with a local tour operator for logistics." – Chinese tour operator

Advice and Recommendations

- **Provide personalized experiences.** Tourists seek one-on-one conversations with Indigenous people, and are interested in Indigenous storytelling, experiences with local and authentic foods, and activities tailored to their travel needs.
- **Include local, authentic food and beverage options in packages.** Prospective visitors from all markets express a strong desire to taste traditional Indigenous foods during their experience as a way of engaging with the culture.
- **Expand offerings.** A more holistic approach to offering urban experiences is desired by long-haul markets. Consider developing partnerships with operators and experiences in urban centres to provide additional travel options.
- **Build relationships and tailor marketing materials.** The key to attracting the Chinese market is to build solid relationships with tour operators most receptive to promoting Saskatchewan's Indigenous tourism offering. Provide tour operators with comprehensive, area-specific details and cultural background. Attractive marketing and promotional materials translated into Mandarin will be most effective.



Two Spirit Powwow, Beardsley & Okemasis' Cree Nation. Photo by Urban Systems.

KEY MARKET SNAPSHOTS

The following summaries of Chinese, German, U.K. and U.S. (long-haul) travellers are based on information collected by Destination Canada and ITAC and published in the *2019 Market Snapshots: Understanding the Opportunity for Indigenous Tourism Business in Canada*.



Germany

Level of interest in Saskatchewan: Moderate

Level of interest in Indigenous experiences: Moderate to high

- 47 per cent of market interested in Indigenous cultural experiences
- 33 per cent of travellers who, in the past three years, took part in an Indigenous experience

Accommodation: Hotels, modern tipi-inspired structures, traditional tipis and camping/glamping – bedding must be included

Activity level: Low to moderate physical impact

Food and beverage preferences: Local cuisine/ingredients, traditional Indigenous food, sharing a meal

Transportation: Rental vehicle ("on your own"), with option of bus/shuttle service

Length of Stay: 4-7 days

Customization preference: Flexible

Top barriers to travel: Cost and distance

Advice for attracting the German market:

- German travellers are interested in Indigenous tourism experiences as part of a longer Canadian vacation. Consider developing partnerships with other Indigenous and non-Indigenous operators in other parts of Canada.
- They are particularly sensitive to images that appear "touristy" or designed with large tourist groups in mind. Marketing materials must be carefully crafted to convey authenticity and avoid visuals that are perceived as staged or enterprise driven.
- They prefer the ability to pick and choose various activities of interest on their own.
- Their understanding of Canadian Indigenous peoples and cultures is limited. A combination of education and use of more familiar terms may be necessary in marketing materials.



Dakota Dunes Casino



Market: United Kingdom

Level of interest in Saskatchewan: Moderate

Level of interest in Indigenous experiences: Moderate

- 37 per cent of market interested in Indigenous cultural experiences
- 19 per cent of travellers who, in the past three years, took part in an Indigenous experience

Accommodation: Hotels, modern tipi-inspired structures, traditional tipis and camping/glamping

Activity level: Low to moderate physical impact

Food and beverage preferences: Local cuisine/ingredients, traditional Indigenous food, sharing a meal, having menu options to choose from.

Transportation: Rental vehicle ("on your own"), with option of bus/shuttle service

Length of Stay: 3-5 days

Customization preference: Flexible, moderate interest in customizable packages

Top barriers to travel: Cost and distance

Advice for the U.K. market:

- Travellers from the U.K. are interested in Indigenous tourism experiences as part of a longer Canadian vacation. Consider developing partnerships with other Indigenous and non-Indigenous operators in other parts of Canada.
- Package options are appealing to select U.K. travellers, due to unfamiliarity with the region and the convenience that tour packages offer.
- Their understanding of Canadian Indigenous peoples and cultures is limited. A combination of education and use of more familiar terms may be necessary in marketing materials.



Market: China

Level of interest in Saskatchewan: Low to moderate

Level of interest in Indigenous experiences: Low to moderate

- 35 per cent of market interested in Indigenous cultural experiences
- 27 per cent of travellers who, in the past three years, took part in an Indigenous experience

Accommodation: Hotels, modern tipi-inspired structures

Activity level: Low to moderate physical impact. No water-based activities.

Food and beverage preferences: Local cuisine/ingredients, traditional Indigenous food that is served hot (avoid salads, cold cuts, and sandwiches), having menu options to choose from.

Transportation: Pre-arranged bus/shuttle service

Length of Stay: 2-3 days

Customization preference: Packaged tour

Top barriers to travel: Weather, language, safety, cost, distance

Advice for the Chinese market:

- Awareness of Canadian Indigenous history and culture is limited among Chinese tour operators and very limited among end customers.
- Attracting visitors from China will require solid relationships with tour operators who are most receptive to promoting Saskatchewan's Indigenous tourism offerings. Working with operators to develop packages suitable for the Chinese market will yield benefits.
- Developing promotions and marketing materials for tour operators is essential. The resources help them to build itineraries promoting travel to Saskatchewan.
- As 80 per cent of Chinese visitors are not fluent in English, marketing materials should be translated into Mandarin.
- Promotional materials will be more effective if they include images of Chinese visitors enjoying the experience.



Chief Whitecap Waterway



Market: United States (long-haul)

Level of interest in Saskatchewan: Moderate to high

Level of interest in Indigenous experiences: Moderate

- 33 per cent of market interested in Indigenous cultural experiences
- 18 per cent of travellers who, in the past three years, took part in an Indigenous experience

Accommodation: Hotels, modern tipi-inspired structures

Activity level: Low to moderate

Food and beverage preferences: Local cuisine/ingredients, traditional Indigenous food, sharing a meal

Transportation: Rental vehicle ("on your own")

Length of Stay: 3-5 days

Customization preference: Flexible

Top barriers to travel: Value proposition – is Saskatchewan culturally different enough from the U.S. to be worth spending money on a vacation?

Advice for U.S. market (long-haul):

- General knowledge of Saskatchewan is weak, although prospective travellers demonstrate interest in having a unique Canadian experience through Indigenous tourism.
- There is concern over ownership of Indigenous tourism attractions and the primary beneficiaries. Marketing materials must be carefully crafted to convey authenticity and to avoid visuals that are perceived as enterprise driven.
- Americans are less familiar with the term "Indigenous" and do not immediately associate the term with the Indigenous peoples of Canada. Marketing materials may require a combination of education and use of more familiar terms.



Saskatchewan Indigenous Tourism Corridor partners:



Beardy's & Okemasis' Cree Nation



Wanuskewin



Whitecap Dakota First Nation