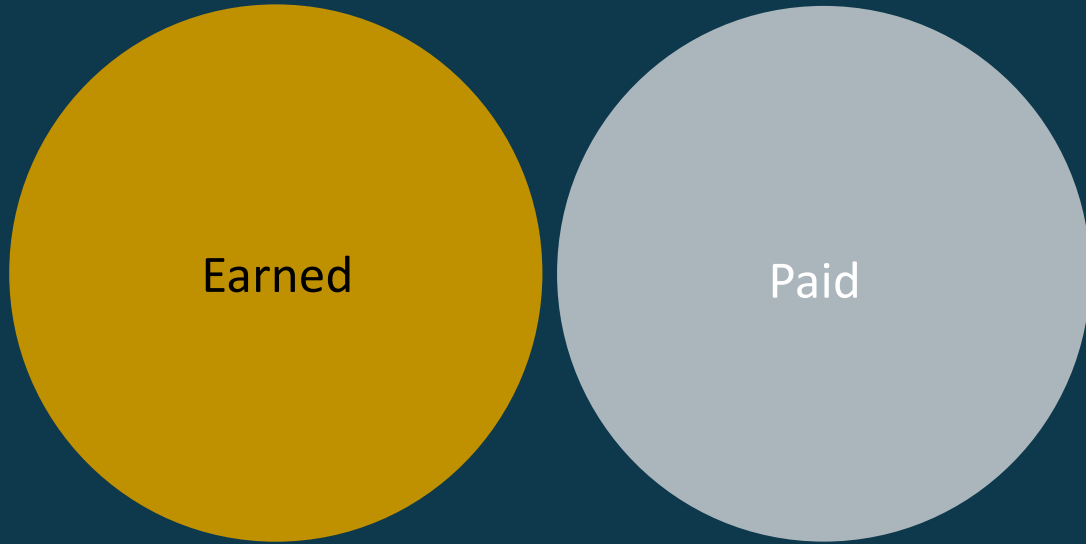




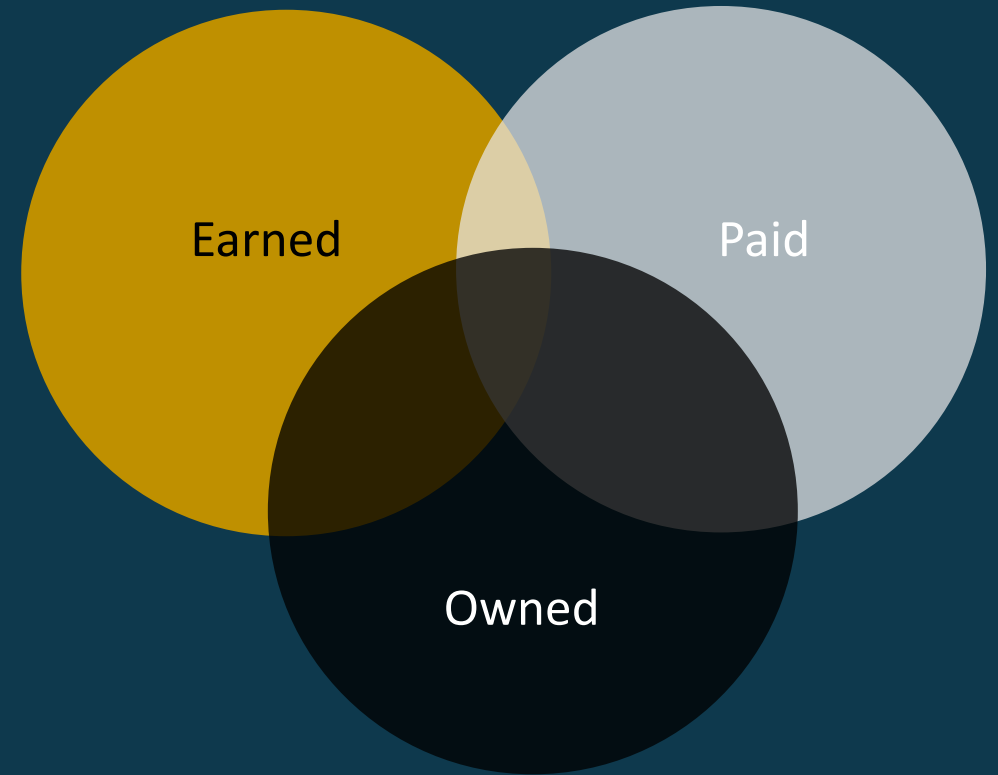
Indigenous Tourism Association of Canada: Sentiment Analysis Summary

Media Balance:

1995



2005



Media Balance:

Earned
Billions of pieces
of content each day

Owned

Paid

2015

Destinations that win in the future

Word of Mouth and Online
Sentiment

The Destination Brand and TSI

The sum of all
the stories
somebody
hears



The
combination of
all experiences
during a trip

Destination Management

“...the only path to profitable growth may lie in a company’s ability to get its loyal customers to become, in effect, its marketing department.”

- *Harvard Business Review*

“What gets measured, gets managed”

- *Peter Drucker*

Sentiment Analysis



Analyze everything said about the ITAC membership base online



Measure the performance with a simple KPI



Benchmark against competitors from around the world



Categorize success across areas of conversation that matter the most



Provide crystal-clear focus to align to

Indigenous Tourism Association of Canada: Sentiment Analysis Summary



Parameters

The Canadian Indigenous Tourism industry is truly a sum of its parts. To effectively measure the overall sentiment towards the Industry, we measured each individual experience and its contribution to the whole.

- **What:** 9,235,267 + online conversations from around the world
- **When:** July 1, 2015 – June 30, 2018
- International Comparison: Maori (New Zealand), Maasai (Kenya), Narungga (Australia), San (South Africa), Tharu (Nepal)

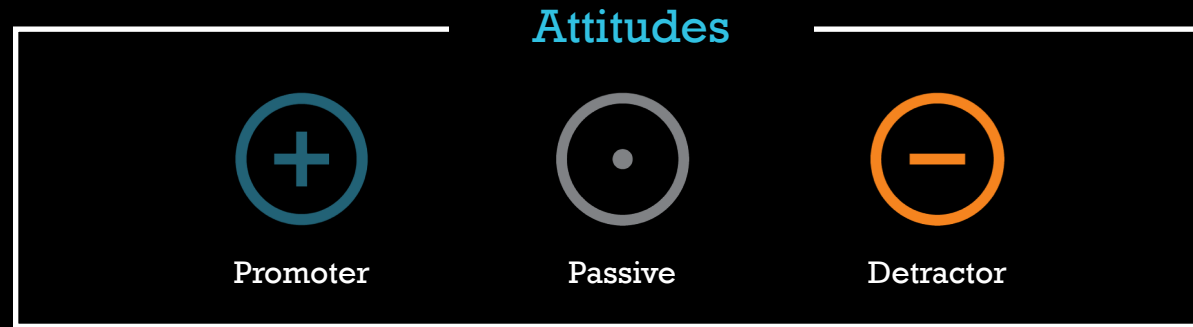
Sources

More than **500,000 different sources** were included in the analysis, including online media sites, forums, reviews and social media networks (Twitter, Facebook, Instagram, Tumblr, YouTube and TripAdvisor).



Gathering sentiments

A sentiment score allows us to understand in a single snapshot the overall attitude of conversations through the eyes of its visitors, and provides a performance benchmark that can be tracked over time. Throughout the report, attitudes are marked as promoter, passive or detractor.



Applying the formula

Once scanning, monitoring and analysis of all online conversations happening around the world are complete, we apply the Tourism Sentiment Score™ formula.

Formula

$$\left[\text{⊕} \% \right] - \left[\text{⊖} \% \right] \times 100 = \text{Sentiment Score}^{\text{TM}} \text{ Result}$$

The diagram shows the formula for calculating the Sentiment Score. It is presented within a white-bordered box with the word "Formula" centered at the top. The formula itself is: a blue circle with a plus sign followed by a percent sign, enclosed in brackets, minus an orange circle with a minus sign followed by a percent sign, also enclosed in brackets, multiplied by 100, equals the text "Sentiment Score™ Result".



Experience promoter

Those actively recommending or speaking positively about the experience to others

thetravellingmom - Spent a truly special cultural and culinary experience Wanuskewin Heritage Park in Saskatoon last night. The Park is seeking UNESCO World Heritage status, in recognition of its ancient settlement,



Experience passive

Those speaking about the experience from an indifferent point of view

lamarr1969 - The valley at Wanuskewin Heritage Park. Cold for end of April... #wanuskewin #valley #beautifulday #cold #damsnow #hangry



Experience detractor

Those actively discouraging or speaking negatively about the experience to others

★★★★★ a year ago

pretty light as to what they have inside there

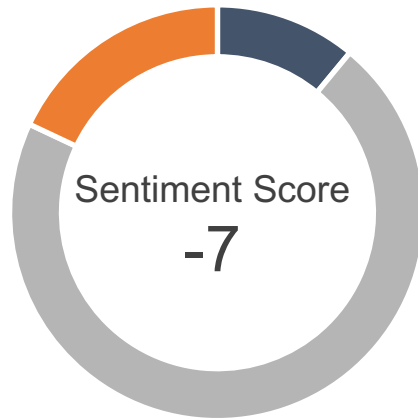
i was traveling with a retired couple one of which has limited mobility. she did not want to go outside so we stayed inside. not a lot in there.

ITAC – Overall Sentiment Score

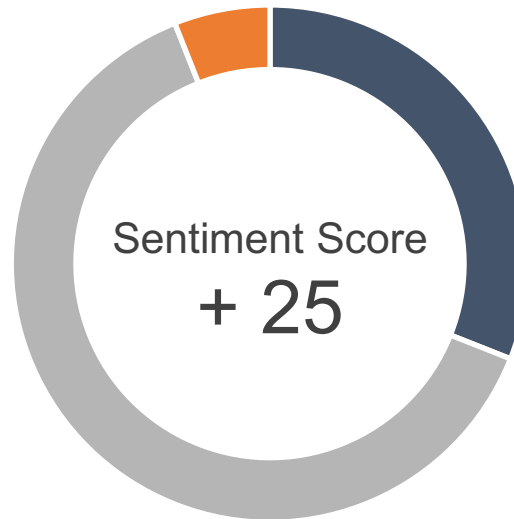
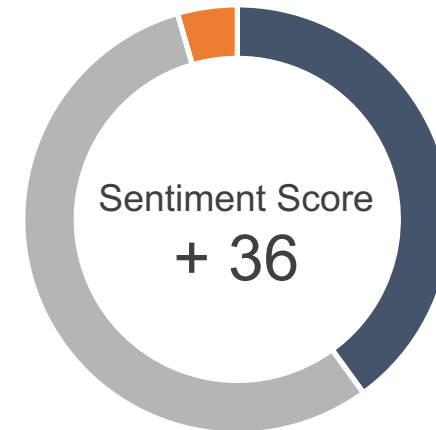
The conversation Sentiment Score is a measure of the ITAC and its membership's ability to generate positive word of mouth around the indigenous tourism offering in Canada. It is an aggregate score that focuses on online conversations that reference or are generated by the ITAC membership, and ultimately affect a potential travelers' perceptions of the tourism experience.

ITAC Membership Conversation

Canadian Indigenous
Peoples Conversation Overall



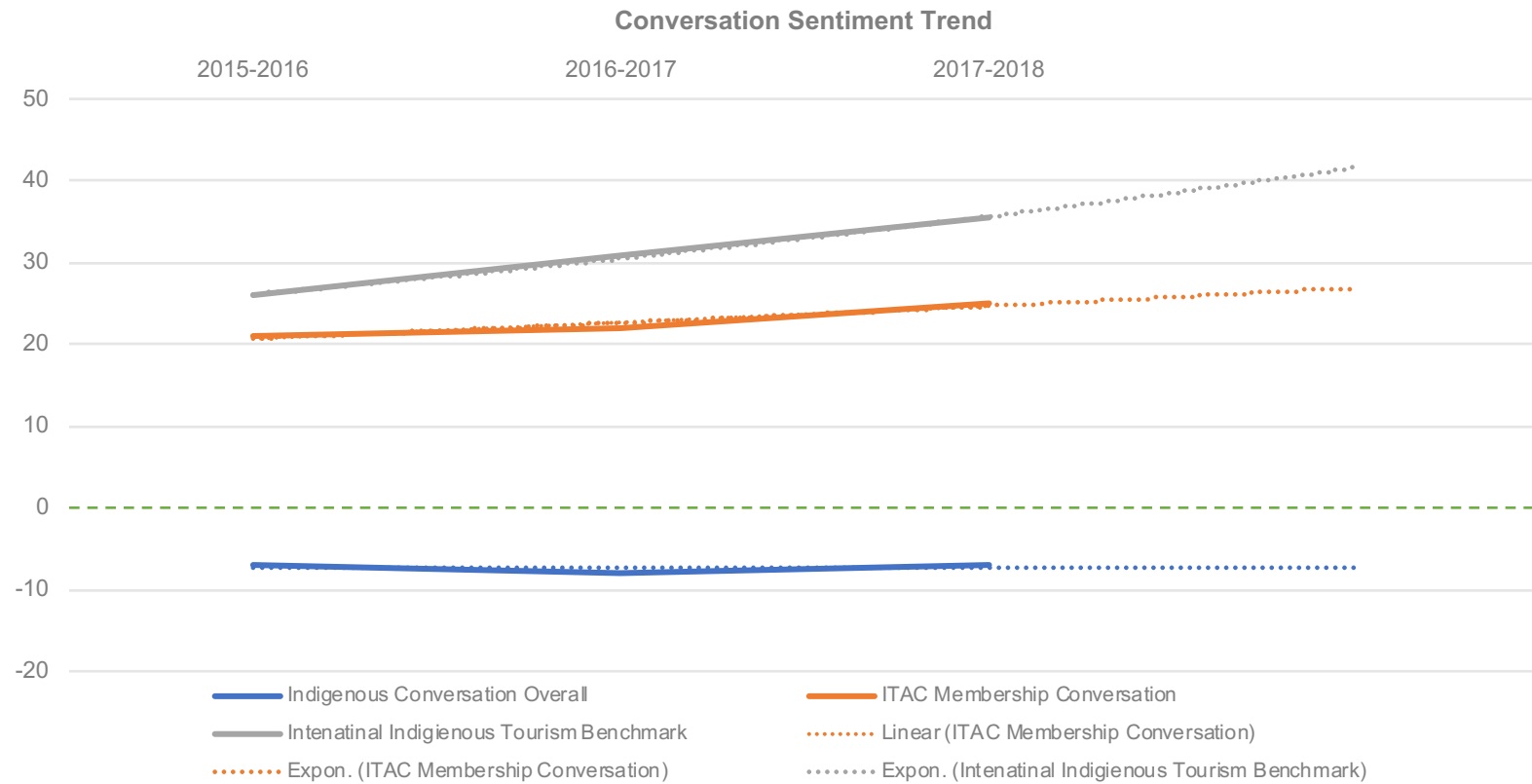
International Indigenous
Tourism Benchmark



● Detractors ● Passive ● Promoters

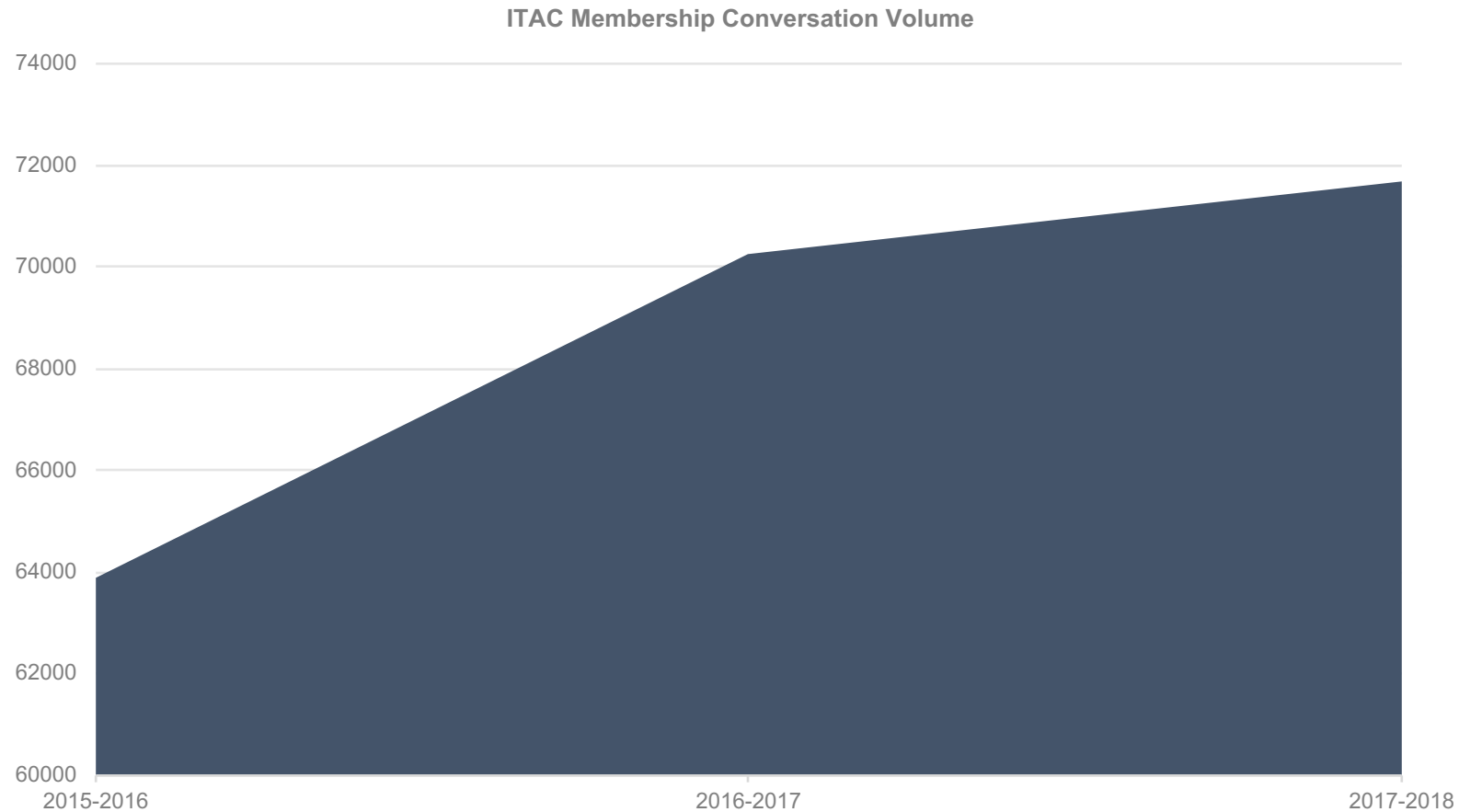
ITAC – Sentiment Trend

We have broken out the annual sentiment towards all three categories over a three-year span. From this we are able to see the current growth rate in which the ITAC and its membership have seen to-date and gain understanding into its future direction.



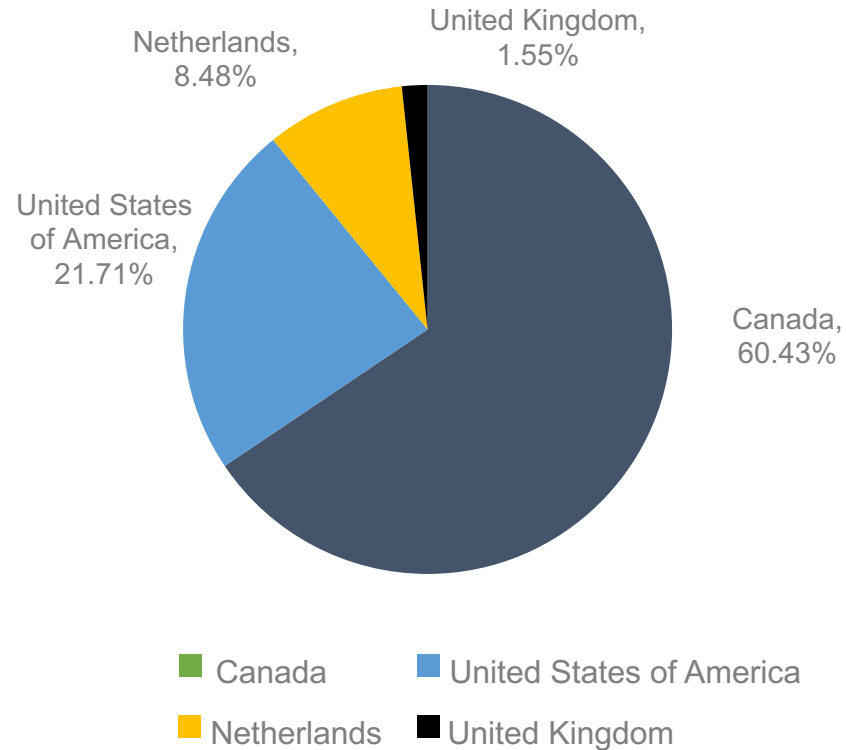
Section Overview

Indigenous Tourism Conversation Volume saw a significant spike in 2016-17, and has continued with moderate growth from 2017-18. As more and more people continue to share content online the growth in conversation around ITAC should also grow.



Online Audience Distribution: by Country

Geographic Location: ITAC Member Conversation by Country

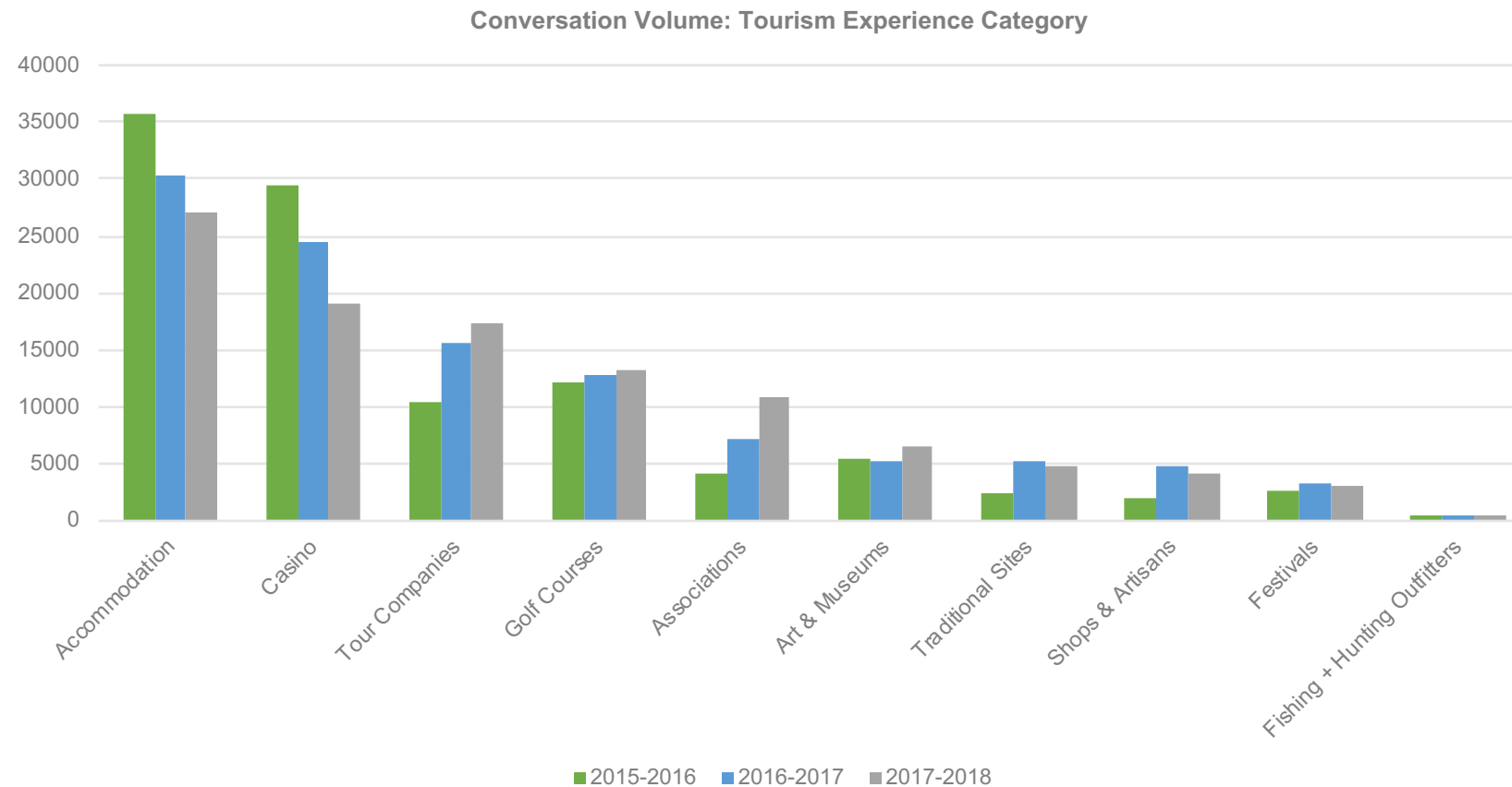


In order to better understand where the online conversations around the ITAC membership are taking place, we analysed the user data from 67,198 unique online users from around the world.

The domestic travel market within Canada makes up approximately 60% of the overall conversation, followed by a fairly significant 21% share of conversation within the USA.

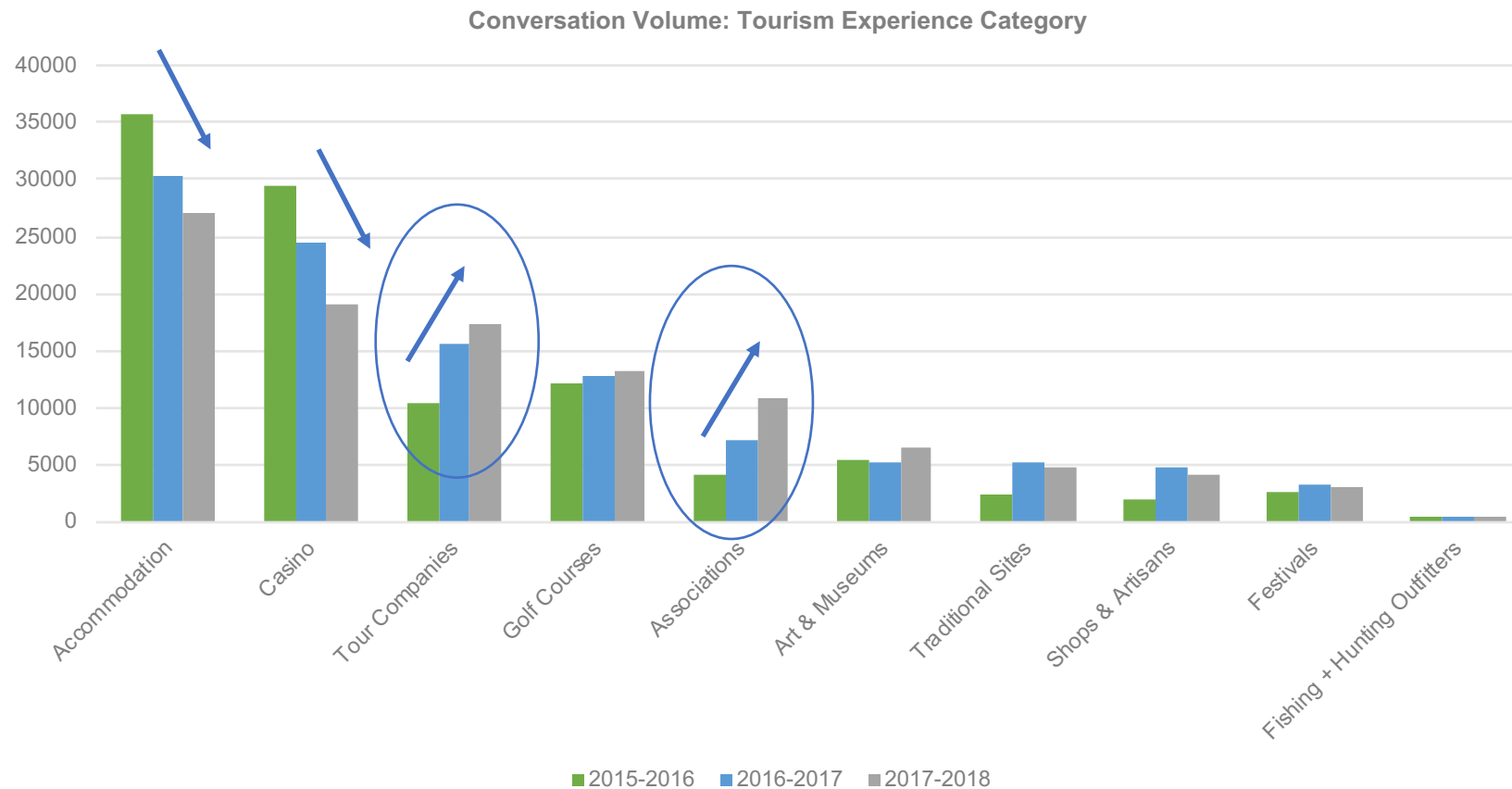
Section overview

Accommodation, Casinos and Tour Companies account for approximately 60% of the total conversation. Associations and Cultural Centres have shown the highest three-year growth trend.



Section overview

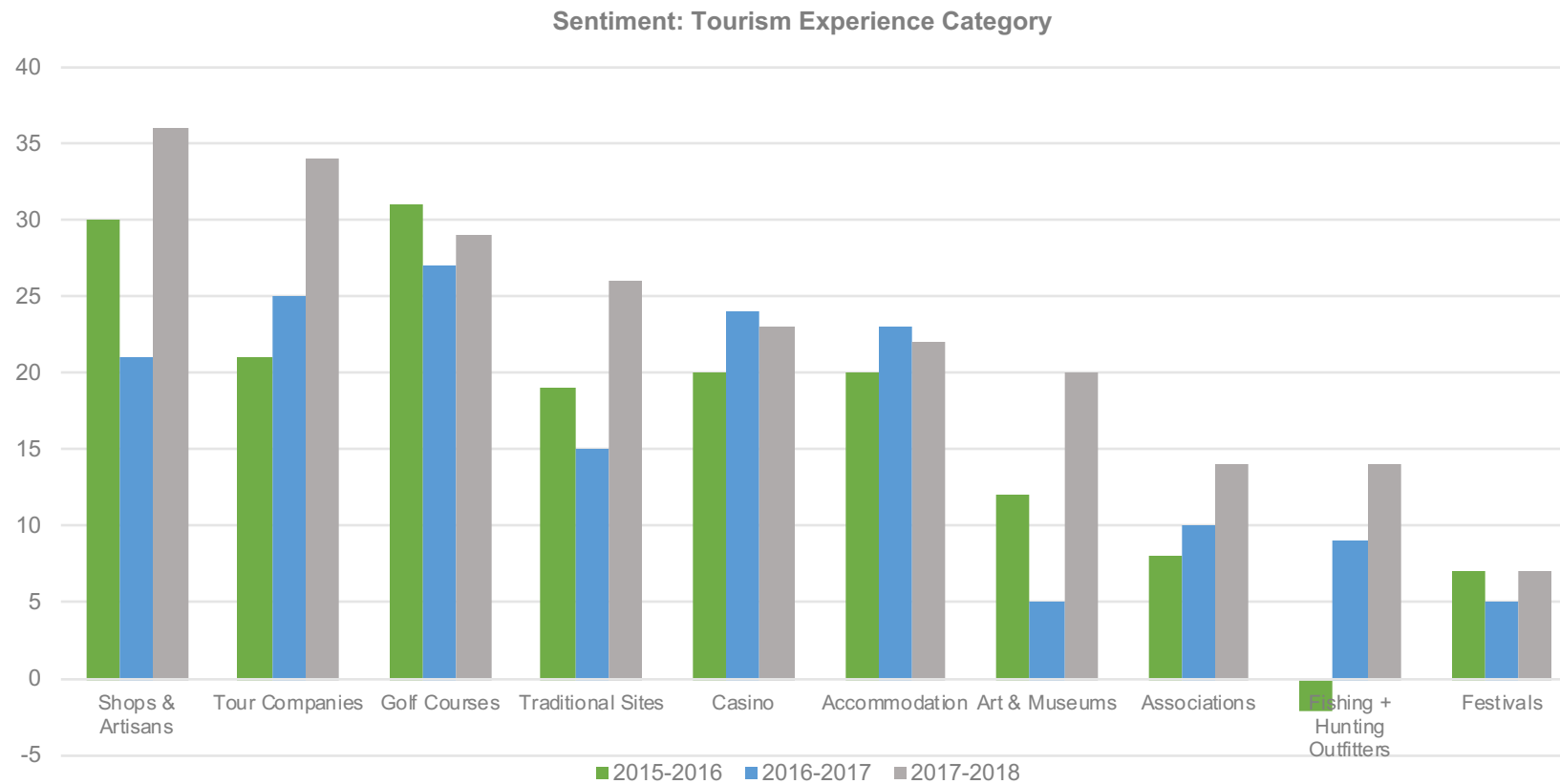
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Section Overview

Artisans, Tour Companies and Golf Courses are the top three sectors driving the highest sentiment scores.

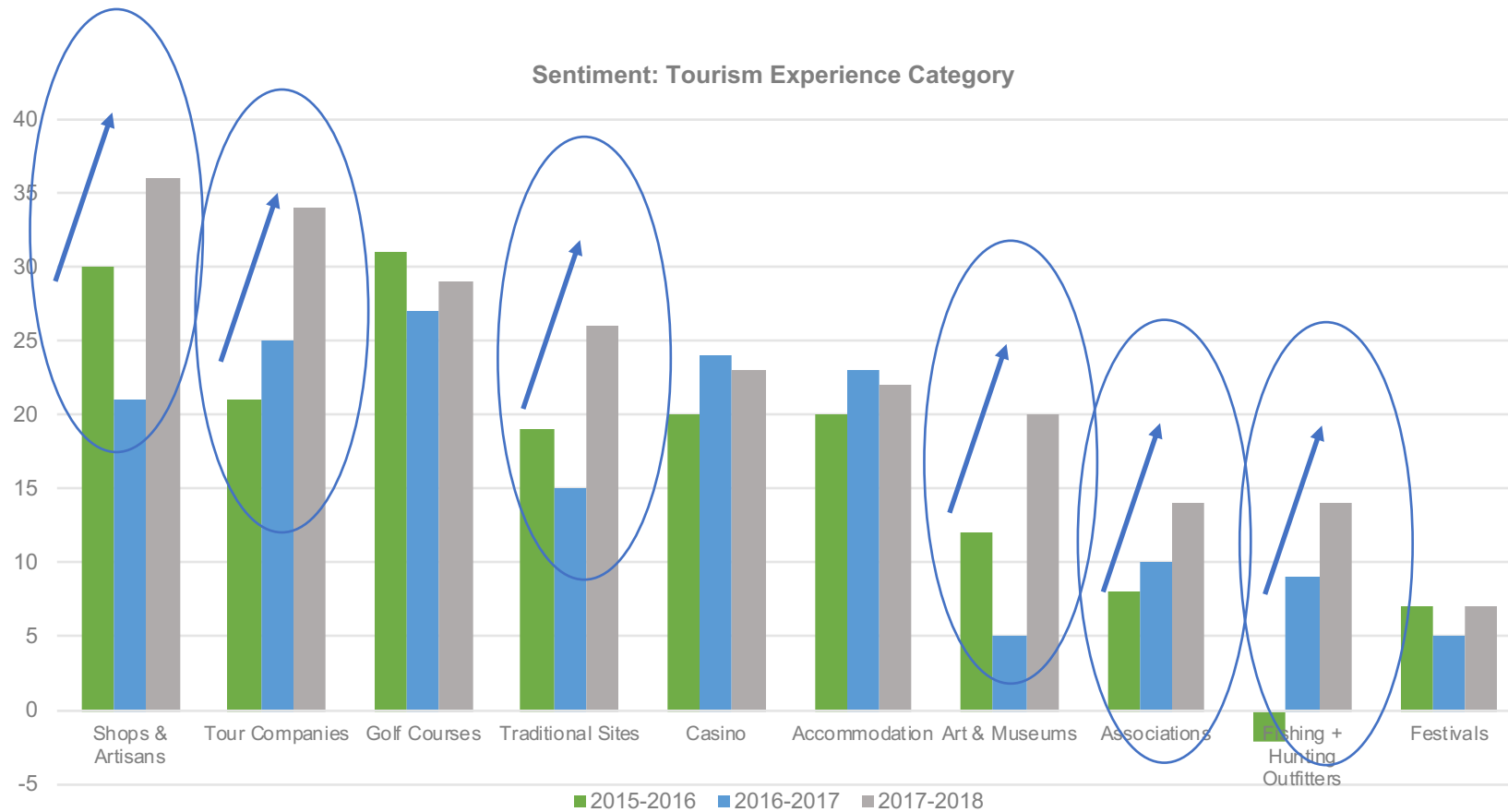
Tour Companies were the only sector to be in the top three for both volume and sentiment. This sector is overall the top contributor within the ITAC membership conversation.



Section Overview

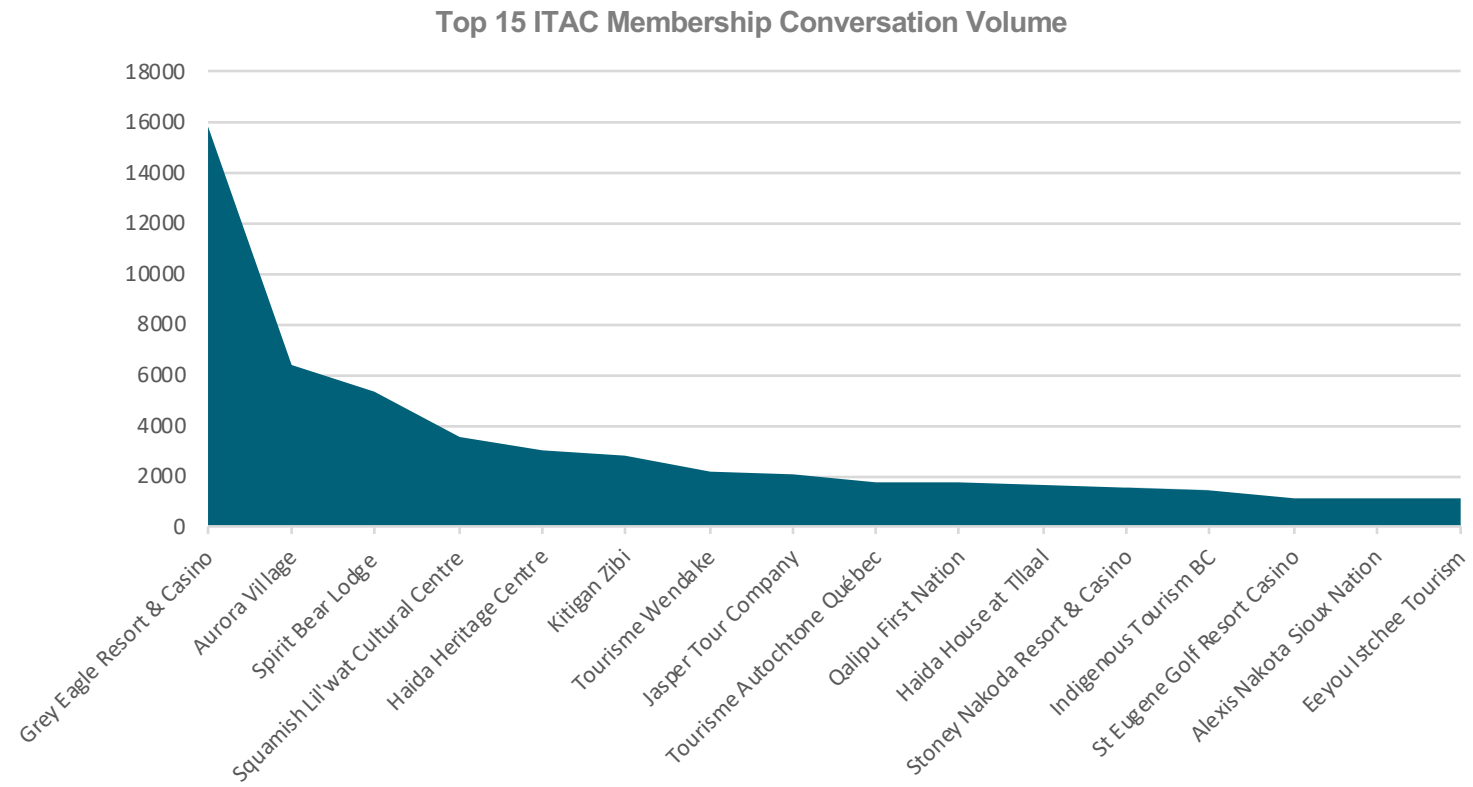
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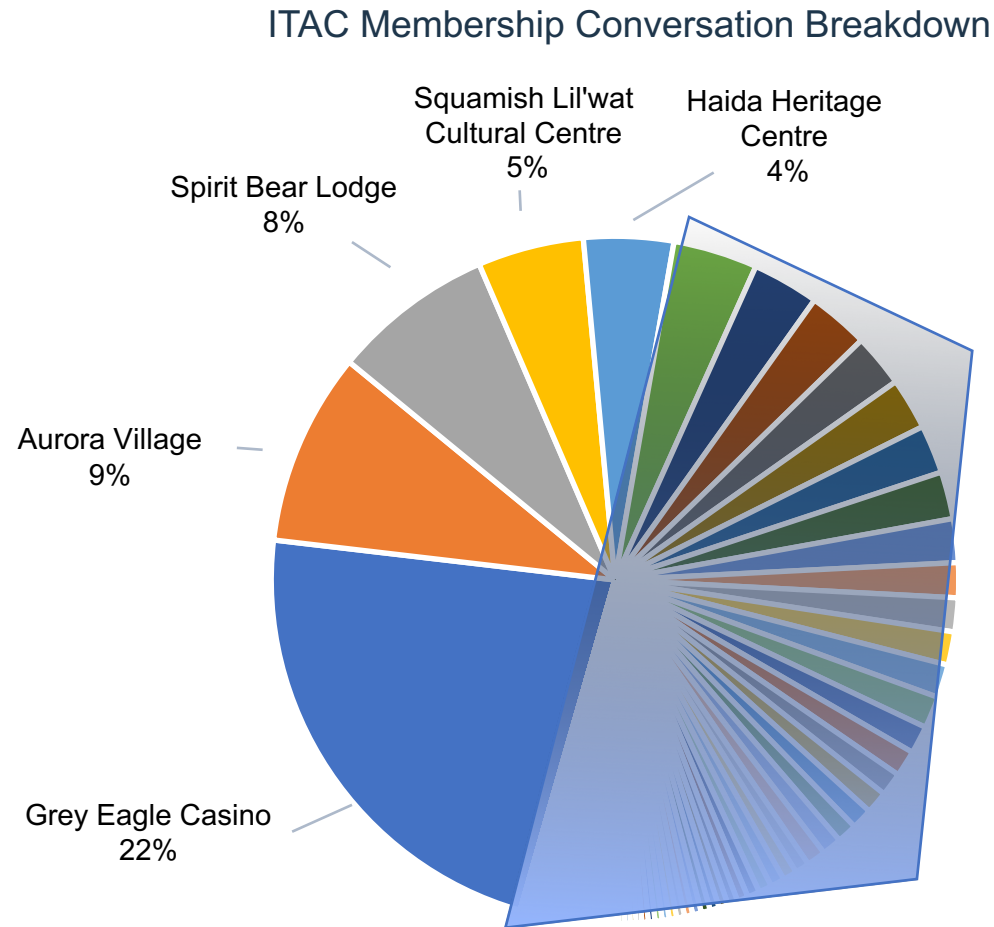
Section overview

When breaking the conversation down into the individual ITAC contributing members, we can see that approximately 50% of all conversation volume stems from the top five ITAC members. This presents a significant opportunity for growth.



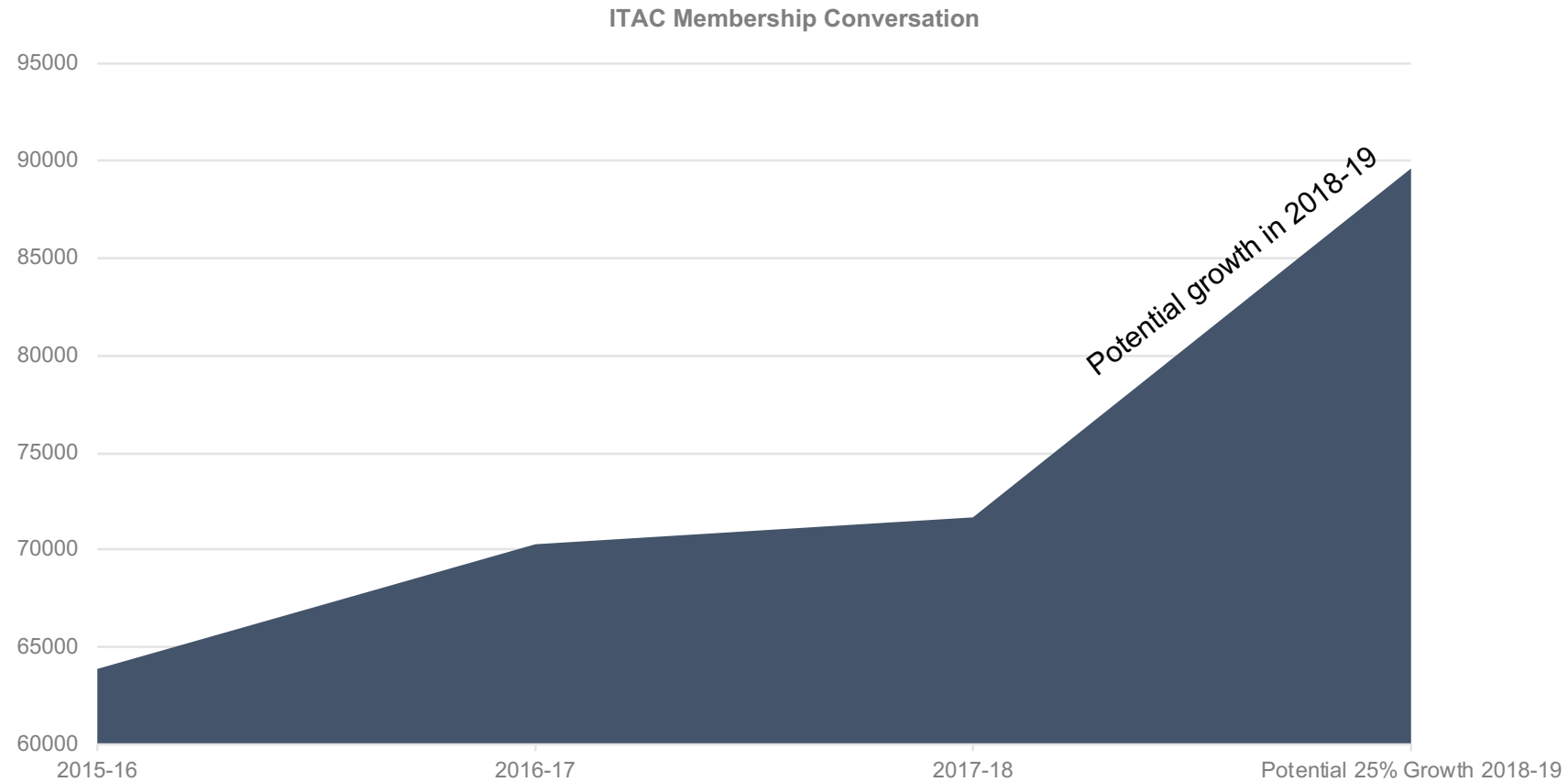
Section overview

The most significant opportunity for the Indigenous Tourism Association of Canada lies in its ability to motivate and inspire the 157 market ready members currently generating less than 1/3 of the overall conversation volume.



Section overview

If all 157 market ready members we able to generate one conversation a week about their experience or product, the overall conversation volume around Indigenous Tourism in Canada would grow by approximately 30%.



The most significant opportunity for the Indigenous Tourism industry lies in its ability to motivate and inspire their guests, visitors and fellow industry partners to tell others about their story.

The impact of all market ready members generating 2-3 online conversations a week, would cause the overall conversation around Indigenous Tourism experiences in Canada to grow by approximately 30%.



Tourism
Sentiment
Index

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