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Global report

Indigenous tourism and cultural offering attractiveness in Canada



DATE 2022-12-07 PROJECT NUMBER 16557-001

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METHODOLOGY

METHODOLOGY

HOW

A Web survey, conducted among 1 305 respondents. The sample was drawn from Léger's panel.

1 305 residents of Saskatchewan, New Brunswick, Nova Scotia, Newfoundland and Labrador and Prince Edward Island, having traveled in their province or in neighboring province(s) in the past 24 months, aged 18 and over, speaking French or English*. The maximum margin of error for a sample of the same size is +/- 2.7%, 19 times out of 20. Details are shown below:



WHO

Provinces	Unweighted total	Error margin
Saskatchewan	504	+/- 4,4%
New Brunswick	301	+/- 5,6%
Nova Scotia	300	+/- 5,6%
Newfoundland and Labrador	100	+/- 9,8%
Prince Edward Island	100	+/- 9,8%
Total	1 305	+/- 2,7%



WHEN

Before the official data collection, a pre-test was done on October 13th, 2022 to validate the survey. Data collection took place from October 14th to November 2nd, 2022 inclusively.



WEIGHTING

Using data from Statistics Canada, the results were weighted according to gender, age, area, spoken language, and presence of children in the household, to ensure a sample representative of the entire population under review.

ROUNDING

The complement to 100% is due proportion rounding or non-response.

In some cases, respondents could provide more than one answer. The totals presented for these questions are therefore greater than 100%.

SIGNIFICANT DIFFERENCES

Results showing significant differences are presented in the tables and graphs, or in the analysis comments. A number in **red** indicates a proportion/mean that is significantly lower than the proportion of the complement. Conversely, a number in **green** indicates a proportion/mean that is significantly higher than the proportion of the complement.

NOTES

*Quotas were imposed according to each province.

INCIDENCE

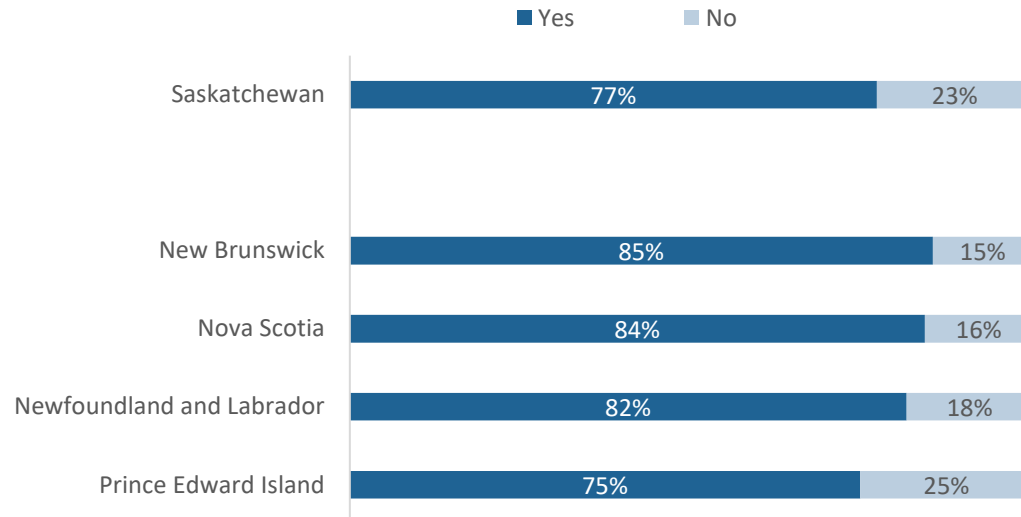
82% of surveyed Canadians have taken at least one leisure trip and/or one day trip in their province in the last 24 months.

These respondents were eligible to take the survey.

Eligibility details for each province of residence are presented below.

FITRE1 : In the past 24 months, in which Canadian province(s) have you taken at least one leisure trip? FITRE 2 : In the past 24 months, in which Canadian province(s) or territories have you taken at least one day trip? – % of respondents who took at least one leisure trip and/or at least one day trip in their province in the last 24 months

Base : all respondents before filtering (n=1 801)



To be eligible, residents of **Saskatchewan** had to have done at least one leisure trip or day trip in their province in the past 24 months.

To be eligible, residents of **New Brunswick, Nova Scotia, Newfoundland and Labrador and Prince Edward Island** had to have done at least one leisure trip or day trip in their province or in another Atlantic province in the past 24 months.



STRATEGIC FINDINGS

STRATEGIC FINDINGS

The study shows a clear potential for Indigenous cultural tourism in Canada and among provinces*.

Here are the main takeaways :

86%

of surveyed Canadians have a positive opinion of Indigenous Peoples in their province and in the rest of Canada.

22%

of surveyed Canadians don't know the Indigenous tourism and cultural offer in their province at all.

38%

of surveyed Canadians have never taken part in an Indigenous tourism and cultural activity.

88%

of surveyed Canadians have manifested at least minimal interest in participating in at least one Indigenous cultural and tourism activity.

Surveyed Canadians are interested in learning more about Indigenous Peoples. However, many are unfamiliar with the Indigenous tourism and cultural offer and haven't had the opportunity to take part in this type of activity. Here are some key elements to consider when defining and promoting the offer:

1. Surveyed Canadians generally have a good opinion of Indigenous Peoples and are interested in learning more about them. The main obstacle in taking part in an Indigenous activity is **not knowing enough about Indigenous tourism and culture**. Additionally, knowing that day trips and short stays (weekends) are preferred by surveyed Canadians, ITAC should concentrate the promotion of its offering around local offer.
2. Knowing more about the Indigenous tourism and cultural offer could certainly help to counter minor negative perceptions that some may have, particularly on the fact that Indigenous experiences are like each other and that they can be accessible (both in terms of financial than geographical).
3. Surveyed Canadians believe that Indigenous experiences should be owned, operated and led by Indigenous individuals or communities, and agree that the government of Canada and of their province should invest more in Indigenous tourist and cultural infrastructure, as they consider Indigenous tourism and cultural activities as a path to reconciliation. Attest of authenticity and ownership cannot be ignored when defining and promoting an Indigenous experience.

* Among surveyed provinces : Saskatchewan, New Brunswick, Nova Scotia, Newfoundland and Labrador and Prince Edward Island.

STRATEGIC FINDINGS

To promote the Indigenous tourism and cultural offer, marketing and communication strategies designed to reach the right targets, with the right offer, on the right platform should be elaborated.

Three general findings can help define Canadian's interests in Indigenous tourism and cultural activities.

These findings are important to keep in mind when defining the offer.

1. Most Canadians are interested in **contemplative and cultural** activities such as visiting a museum, interpretation centre, boutique or art exhibition. Some have also manifested their interest in attending an Indigenous Pow Wow, festival, event or performance, which are considered more **immersive** activities.
2. Canadians who are at least somewhat familiar the Indigenous tourism and cultural offer in their province a little better (average knowledge) tend to have more interest in engaging activities such as going in an Indigenous adventure, connecting with elders or visiting an Indigenous community.
3. Also, Canadians who have taken part in an Indigenous activity in the past have a higher interest in renewing the experience. Therefore, a customer acquisition strategy combined with a **loyalty** strategy would be interesting to consider eventually.

To help ITAC design tourist and cultural offers, we've built a few packages around motives of segments that provide the best potential. This process was done with the help of a market simulator, which is provided to ITAC with this report.

STRATEGIC FINDINGS

First scenario: Between nature and knowledge

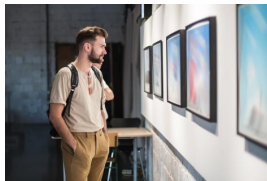
Targeted segments



The MELLOW PASSIONATE | 13%

Estimated potential*: 390 k people

Profile: men and women, 55 years old and up.



The SHY LEARNER | 13%

Estimated potential*: 390 k people

Profile: men and women of all ages.

Preferred platforms

- Search engines (key words and search optimization)
- Local and provincial Indigenous tourism websites

Optimized offer

- Cultural activities, that could take place in nature
- Short visit, daytrip
- As a couple
- With accompaniment and interaction

Preference share

Three alternatives were tested with Mellow passionates and Shy learners. The first alternative was considered the most optimal offer and the two others were, based on their interests, considered as potentially interesting. As anticipated, the first option gets a higher preference share than the others.

	Alternative 1	Alternative 2	Alternative 3	None of these
TYPE OF EXPERIENCE	Visit to a museu... ▾	Visit to a shop o... ▾	Attend an Indig... ▾	
COMPANIONS	As a couple ▾	As a couple ▾	As a couple ▾	
LOCATION	In nature ▾	In nature ▾	In an Indigenou... ▾	
GUIDANCE AND INTERACTION	With accompani... ▾	With accompani... ▾	With accompani... ▾	
DURATION	Day trip (withou... ▾	Day trip (withou... ▾	Day trip (withou... ▾	
Preference Share	34.0	29.5	26.8	9.6



Mellow passionates and Shy learners are particularly interested in participating in more **contemplative activities**, such as visiting a museum or an exhibition. Their level of interest tend to be higher when these activities are set up in nature, in opposition to any other environment (urban or Indigenous community).

STRATEGIC FINDINGS

Second scenario: Authentic experience

Targeted segments



The CURIOUS RATIONAL | 24%

Estimated potential*: 725 k people

Profile: men and women of all ages



The DEEP DIVER | 22%

Estimated potential*: 665 k people

Profile: young women (18-34)

Preferred platforms

- Search engines (key words and search optimization)
- Local and provincial Indigenous tourism websites
- Social media and word of mouth

Optimized offer

- Engaging activities, taking place in an Indigenous community.
- Daytrip or short stay
- As a couple
- Without accompaniment, but with interaction

Preference share

Three alternatives were tested with Curious rationals and Deep divers. Again, the first alternative was considered the most optimal offer and the two others were, based on their interests for higher implication activities, considered as potentially interesting. The two first alternatives were similar, except for the duration. Curious rationals and Deep divers manifested a higher interest in the first alternative, which was the only one offered in the form of a daytrip. The level of interest for participative activities that would be offered in a one-to-two-night stay package tend to be less attractive. However, the preference share for the second and third alternatives shows that Curious rationals and Deep divers have some interest in taking part in an Indigenous activity during a longer timeframe.

	Alternative 1	Alternative 2	Alternative 3	None of these
TYPE OF EXPERIENCE	Attend an Indig...	Attend an Indig...	Stay in Indigeno...	
COMPANIONS	As a couple	As a couple	As a couple	
LOCATION	In an Indigenou...	In an Indigenou...	In nature	
GUIDANCE AND INTERACTION	Without the acc...	Without the acc...	With accompani...	
DURATION	Day trip (withou...	Stay of 1 or 2 ni...	Stay of 1 or 2 ni...	
Preference Share	36.8	29.4	26.9	6.9

* The estimated potential is based on Canadians living in the surveyed provinces (SK, NB, NS, NL, PEI) and the incidence rate, regardless of age groups.

STRATEGIC FINDINGS

Third scenario: Cultural immersion

Targeted segments



The CURIOUS RATIONAL | 24%

Estimated potential*: 725 k people

Profile: men and women of all ages



The DEEP DIVER | 22%

Estimated potential*: 665 k people

Profile: young women (18-34)

Preferred platforms

- Search engines (key words and search optimization)
- Local and provincial Indigenous tourism websites
- Social media and word of mouth

Optimized offer

- Engaging activities, taking place in an Indigenous community.
- Daytrip or short stay
- With friends
- Without accompaniment but with interaction

Preference share

Three other alternatives were presented to Curious rationals and Deep divers. The alternatives were still made up to present scenarios that matched their interests and in which they would participate in **high engagement**, participative activities. This time, however, the two first alternatives were packaged as a vacation (6 nights or more). The last alternative, and the one with the highest preference share, was packaged in the form of a daytrip.

	Alternative 1	Alternative 2	Alternative 3	None of these
TYPE OF EXPERIENCE	Adventure or na...	Stay in Indigeno...	Attend an Indig...	
COMPANIONS	As a couple	As a couple	With friends	
LOCATION	In nature	In nature	In an Indigenou...	
GUIDANCE AND INTERACTION	With accompani...	With accompani...	Without the acc...	
DURATION	Stay of 6 nights ...	Stay of 6 nights ...	Day trip (withou...	
Preference Share	17.0	20.3	54.3	8.4



This scenario aims to demonstrate that even if they show a high interest in participative activities, **Curious rationals and Deep divers aren't quite ready to immerse themselves in the Indigenous culture for a long period of time.** As they are introduced to the Indigenous tourism and cultural offer while participating in one-day activities, they have the potential to eventually acquire the desire to engage in a longer type of Indigenous experience.

* The estimated potential is based on Canadians living in the surveyed provinces (SK, NB, NS, NL, PEI) and the incidence rate, regardless of age groups.

STRATEGIC RECOMMENDATIONS | Raymond Chabot Grant Thornton

The next section was developed by Raymond Chabot Grant Thornton (RCGT).

RCGT's Tourism, Recreation and Culture team was mandated to give high-level strategic considerations arising from the survey results, and to provide courses of action to the study sponsor and its readers.

Canadians' interest in Indigenous tourism in the provinces surveyed is strong enough to warrant attention. For the benefit of policy makers, decision makers and partners in the Atlantic Provinces and Saskatchewan, here are a few recommendations and courses of action based on three pillars :

1 : OUTREACH

PROMOTE CLOSER TIES BETWEEN INDIGENOUS COMMUNITIES AND THE GENERAL PUBLIC (REACH OUT)

1. Invite Indigenous communities to share their culture and identity in venues, forums and public events ;
2. Promote the skills of Elders through demonstration activities in national and other natural parks ;
3. Support and sponsor events open to the public in Indigenous communities (e.g., Pow Wow).

2 : PROMOTION

PROMOTE INDIGENOUS COMMUNITY TOURISM EXPERIENCES IN THE DOMESTIC MARKET

1. Promote the tourism and cultural offerings of the Indigenous communities with information providers in the various regions of the province ;
2. Showcase the authentic experiences of Indigenous service providers in the province's tourism promotion campaigns ;
3. Monitor the results and evolution of Canadians' attitudes towards Indigenous tourism.

3 : DEVELOPMENT

SUPPORT JOB DEVELOPMENT AND INDIGENOUS TOURISM BUSINESS GROWTH

1. Provide financial and personnel support to help professionalize Indigenous-owned tourism businesses ;
2. Support new Indigenous entrepreneurs in the development and innovation of tourism businesses (financially and with personnel) ;
3. Facilitate the takeover of existing tourism businesses through partnerships with interested Indigenous communities.

CONDITIONS OF SUCCESS | Raymond Chabot Grant Thornton

SHARE SURVEY RESULTS

- With decision makers, policy makers and partners in the tourism industry ;
- With Indigenous communities and businesses.

DEFINE A COMMON VISION FOR INDIGENOUS TOURISM GROWTH

- Led by the ITAC ;
- With specific objectives and timelines ;
- With substantial resources and aligned strategies.

DRAW INSPIRATION FROM SUCCESSES AND GOOD PRACTICES

- In provinces like British Columbia, Alberta and Quebec ;
- Coordinate objectives and support funds between different levels of government ;
- Communicate progress to all stakeholders.



The momentum to connect with Indigenous communities in Canada has never been greater. As was the case in Quebec, where a similar survey was conducted among the population, the results obtained in the Atlantic Provinces and in Saskatchewan point in the same direction; **Canadians are open and interested in discovering Indigenous communities, but they also need to know them better!**

This creates real opportunities for First Nations to develop in the tourism industry and make it a sustainable economic lever, while preserving and promoting their culture. The spin-offs are beneficial not only for the communities, but also for all Canadians and for Canada's tourism image.



DETAILED RESULTS

1. KNOWLEDGE AND PERCEPTIONS OF INDIGENOUS PEOPLES

1.1 OPINION REGARDING INDIGENOUS PEOPLES | PROVINCE

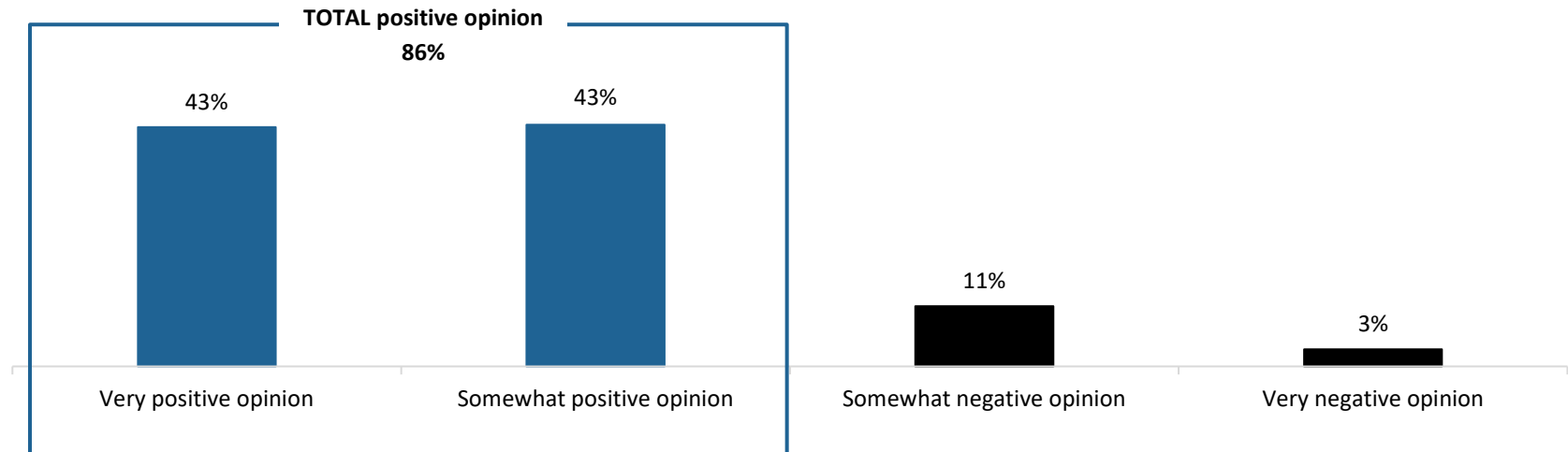
86% of respondents have a positive opinion of Indigenous Peoples in their province: 43% declared having a very positive opinion and 43% declared having a somewhat positive opinion.

Respondents who identify as **First Nation, Metis, or Inuit** (94% positive) and **young adults** (18-34 years old, 91% positive), have a better opinion of Indigenous Peoples.

Nova Scotians have a more positive opinion (90% positive) of Indigenous Peoples in their province than respondents who live elsewhere. On the contrary, Saskatchewanians have the least positive opinion (76% positive).

Q8A : In general, do you have a very positive, somewhat positive, somewhat negative or very negative opinion of Indigenous Peoples in your province*?

Base : All respondents (n=1305)



*In the survey, selected province of residence was shown to respondents.

1.1 OPINION REGARDING INDIGENOUS PEOPLES | REST OF CANADA

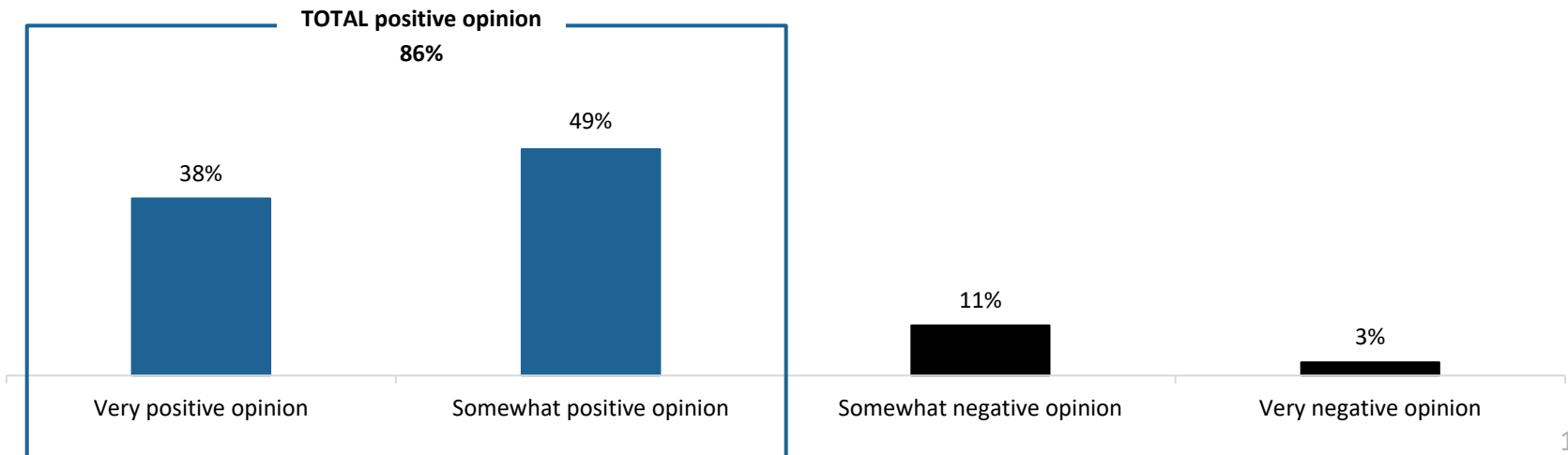
Equally, 86% of respondents have a positive opinion of Indigenous Peoples in the rest of Canada: 38% declared having a very positive opinion and almost half (49%) declared having a somewhat positive opinion.

Respondents who identify as **First Nation, Metis, or Inuit** (96% positive) and **young adults** (18-34 years old, 93% positive), have a better opinion of Indigenous Peoples in the rest of Canada. Among all age groups, older respondents (55+) have the least positive opinion (83% positive).

Compared to respondents who live in other provinces, Saskatchewanians have the least positive opinion (80% positive) of Indigenous Peoples in the rest of Canada.

Q8B : In general, do you have a very positive, somewhat positive, somewhat negative or very negative opinion of Indigenous Peoples in the rest of Canada?

Base : All respondents (n=1305)



1.2 KNOWLEDGE OF INDIGENOUS PEOPLES

More than half of respondents believe that Indigenous Peoples (84%), First Nations (78%) and Indigenous Canadians (66%) are correct terms to use when referring to Indigenous Peoples.

Almost all of those who identify as a First Nation, Metis, or Inuit (90%) believe that **First Nations** is the correct term to use. Apart from the term Indians, a majority of these respondents also affirm that all of the other terms presented are suitable when referring to Indigenous Peoples.

In opposition to those who have a negative opinion of Indigenous Peoples of Canada, those who have a positive opinion are more likely to use the term Indigenous Peoples (85%), First Nations (80%) and Indigenous Canadians (68%) when referring to Indigenous Peoples.

QNEW1 : To the best of your knowledge, are the following terms suitable, or correct, when referring to Indigenous Peoples?	TOTAL	OPINION REGARDING INDIGENOUS PEOPLES OF CANADA		IDENTIFY AS FIRST NATION, METIS, OR INUIT	
		Positive opinion	Negative opinion	Yes	No
<i>Base : all respondents – % yes</i>	1305	1094	211	65	1240
Indigenous Peoples	84%	85%	73%	77%	84%
First Nations	78%	80%	65%	90%	77%
Indigenous Canadians	66%	68%	55%	72%	66%
Native Canadians	47%	48%	45%	61%	47%
Aboriginals	46%	45%	48%	70%	44%
Natives	34%	33%	39%	58%	33%
Indians	16%	13%	32%	31%	15%

1.2 KNOWLEDGE OF INDIGENOUS PEOPLES | PROVINCE

Regardless of their opinion, most respondents don't know the Indigenous Peoples of their province very well: 60% have average knowledge and 24% have poor knowledge. 13% say they have strong knowledge.

Q9A : In general, how well do you feel you know the Indigenous Peoples of your province?	TOTAL	OPINION REGARDING INDIGENOUS PEOPLES OF OWN PROVINCE		IDENTIFY AS FIRST NATION, METIS, OR INUIT	
		Positive opinion	Negative opinion	Yes	No
<i>Base : all respondents</i>	1305	1094	211	65	1240
Strong knowledge	13%	12%	17%	33%	12%
Average knowledge	60%	60%	61%	55%	60%
Poor knowledge	24%	60%	61%	7%	24%
No knowledge	4%	4%	4%	6%	4%

1.2 KNOWLEDGE OF INDIGENOUS PEOPLES | PROVINCE

While most respondents have limited knowledge of Indigenous Peoples in their province, 28% of surveyed Canadians say they don't know anything about their languages. Therefore, this specific element is the one respondents' are least familiar with.

Most respondents declare having average or poor knowledge of the current issues and realities, history, traditions and heritage, cultural and artistic background, and languages of Indigenous Peoples in their province.

Q10 : Thinking about the Indigenous Peoples of your province, how would you describe your level of knowledge of...?	TOTAL	OPINION REGARDING INDIGENOUS PEOPLES OF OWN PROVINCE		IDENTIFY AS FIRST NATION, METIS OR INUIT	
		Positive opinion	Negative opinion	Yes	No
<i>Base : all respondents</i>	1305	1089	216	65	1240
THEIR CURRENT ISSUES AND REALITIES					
Strong knowledge	12%	11%	19%	23%	11%
Average knowledge	60%	61%	55%	61%	60%
Poor knowledge	23%	23%	20%	13%	23%
No knowledge	6%	5%	6%	3%	6%

1.2 KNOWLEDGE OF INDIGENOUS PEOPLES | PROVINCE

Q10 : Thinking about the Indigenous Peoples of your province, how would you describe your level of knowledge of...?	OPINION REGARDING INDIGENOUS PEOPLES OF OWN PROVINCE		IDENTIFY AS FIRST NATION, METIS OR INUIT		
	TOTAL	Positive opinion	Negative opinion	Yes	No
<i>Base : all respondents</i>	1305	1089	216	65	1240
THEIR HISTORY					
Strong knowledge	10%	9%	15%	23%	9%
Average knowledge	54%	54%	51%	55%	54%
Poor knowledge	32%	33%	29%	17%	33%
No knowledge	4%	4%	5%	5%	4%
THEIR TRADITIONS AND HERITAGE					
Strong knowledge	7%	6%	10%	26%	6%
Average knowledge	47%	48%	41%	51%	47%
Poor knowledge	38%	38%	38%	20%	39%
No knowledge	7%	7%	11%	4%	8%
THEIR CULTURAL AND ARTISTIC BACKGROUND					
Strong knowledge	7%	6%	10%	24%	6%
Average knowledge	50%	51%	42%	59%	49%
Poor knowledge	37%	37%	40%	10%	39%
No knowledge	6%	6%	8%	6%	6%
THEIR LANGUAGES					
Strong knowledge	2%	2%	5%	8%	2%
Average knowledge	26%	27%	21%	31%	26%
Poor knowledge	44%	44%	39%	38%	44%
No knowledge	28%	27%	35%	23%	28%

1.2 KNOWLEDGE OF INDIGENOUS PEOPLES | REST OF CANADA

Likewise, most respondents don't know Indigenous Peoples of rest of Canada very well: 51% have average knowledge and 38% have poor knowledge. Only 6% say they have strong knowledge.

Those who have a positive opinion of Indigenous Peoples of the rest of Canada are more likely to declare having poor knowledge (40%) than those who have a negative opinion (28%). On the other hand, a higher proportion of those who have a negative opinion declares having a strong knowledge (10% vs 5% of those who have a positive opinion).

Q9B : In general, how well do you feel you know the Indigenous Peoples of rest of Canada?	TOTAL	OPINION REGARDING INDIGENOUS PEOPLES OF CANADA		IDENTIFY AS FIRST NATION, METIS, OR INUIT		PROVINCE				
		Positive opinion	Negative opinion	Yes	No	SK	NB	NS	NL	PEI
<i>Base : all respondents</i>	1305	1094	211	65	1240	504	301	300	100	100
Strong knowledge	6%	5%	10%	20%	5%	8%	4%	4%	7%	3%
Average knowledge	51%	51%	53%	55%	51%	52%	40%	54%	61%	57%
Poor knowledge	38%	40%	28%	18%	39%	35%	50%	37%	29%	38%
No knowledge	5%	4%	8%	7%	5%	5%	6%	5%	3%	3%

1.3 LEARNING MORE ABOUT INDIGENOUS PEOPLES

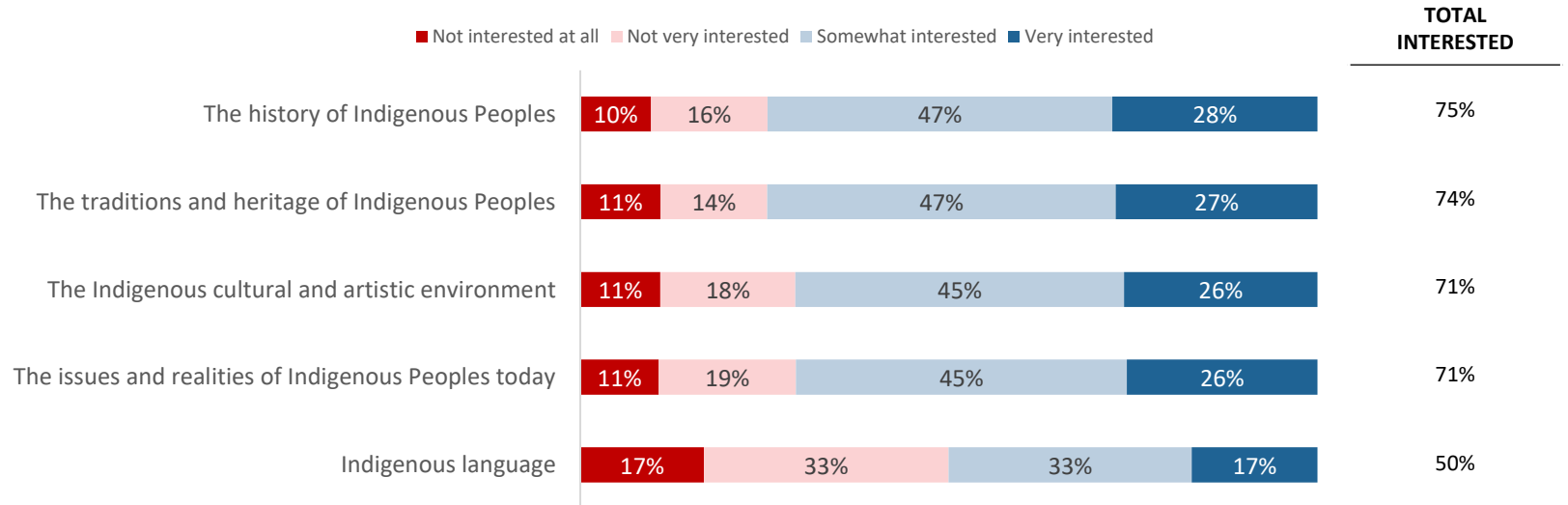
Respondents are interested in learning more about Indigenous Peoples. They are most interested in learning about their history (75%), as well as their traditions and heritage (74%).

Although half of them manifested their interest in the subject, respondents are **least** interested in learning about the Indigenous language.

Compared to men, women have a higher level of interest in most subjects.

Q13 : What would be your interest in learning more about...?

Base : all respondents (n=1305)



1.3 LEARNING MORE ABOUT INDIGENOUS PEOPLES

Whether they identify as First Nation, Metis, Inuit, or not, surveyed Canadians believe that everyone should take responsibility to ensure the bridge between Indigenous Peoples and non-Indigenous Canadians. A higher proportion of respondents believe however that the Federal government (71%) and Indigenous communities and organizations (74%) have the biggest role to play in that specific field.

Older respondents (78% of 55+) and men (78%) are more likely to believe that Indigenous communities and organizations should take the responsibility to ensure the bridge between peoples.

Q14 : In your opinion, who has primary responsibility for ensuring the bridge between Indigenous Peoples and non-Indigenous Canadians?	First mention	All mentions
<i>Base : all respondents (n=1305) – three possible mentions</i>		
PUBLIC AUTHORITIES	51%	80%
Government of Canada	42%	71%
Government of my province	9%	58%
INDIGENOUS COMMUNITIES AND ORGANIZATIONS	22%	74%
INDIVIDUAL RESPONSABILITY	27%	65%
Non-Indigenous Canadians, individually	14%	47%
Indigenous Canadians, individually	13%	43%

MAIN TAKEAWAYS

1

Opinion towards Indigenous People is generally positive but could be improved.

Although an important proportion of surveyed Canadians declared having a positive opinion of Indigenous People in their province (86%) and in the rest of Canada (86%), a little more than one out of ten respondents declared having a somewhat negative or very negative opinion of Indigenous Peoples in their province (14%) and the rest of Canada (14%).

2

Even if they don't know Indigenous Peoples very well, surveyed Canadians show a great interest in learning more about their history and culture.

Although most surveyed Canadians know that Indigenous Peoples (84%) and First Nations (78%) are the correct terms to use when referring to Indigenous Peoples, an important proportion of respondents still believe that Aboriginals (46%), Natives (34%), and Indians (16%) are suitable appellations. If most surveyed Canadians declare having an average knowledge of Indigenous Peoples in their province (60%) and the rest of Canada (51%), less than one out of eight respondents believe to have a strong level of knowledge (13% province, 6% rest of Canada). Level of knowledge aside, surveyed Canadians are interested in learning more about Indigenous Peoples, especially about their history (75%), their traditions and heritage (74%), their cultural and artistic environment (71%), and their current issues and realities (71%).

3

Everyone should take responsibility to ensure the bridge between Indigenous Peoples and non-Indigenous Canadians.

But more specifically, more than seven out of ten respondents believe that the Federal government (71%) and Indigenous communities and organizations (74%) have the biggest role to play in that field.

2. PERCEPTION AND KNOWLEDGE OF INDIGENOUS CULTURAL AND TOURISM EXPERIENCES

2.1 FAMILIARITY WITH THE INDIGENOUS TOURISTIC OFFER | PROVINCE

Most respondents are currently unfamiliar with the Indigenous tourism and cultural offering in their province. More specifically, 40% have a poor level of knowledge and 22% have no knowledge at all.

Respondents who identify as First Nation, Metis, or Inuit have a better knowledge of the Indigenous tourism and cultural offering in their province: 17% declare having a strong knowledge (against 4% of those who don't identify as such).

A little more than one out of three respondents who have a negative opinion regarding Indigenous Peoples of their own province don't know the Indigenous People's touristic offer at all (35% no knowledge).

Q15 : In general, how well do you feel you know the Indigenous tourism and cultural offering in your province...?	PROVINCE						OPINION REGARDING INDIGENOUS PEOPLES OF OWN PROVINCE		IDENTIFY AS FIRST NATION, METIS, OR INUIT	
	TOTAL	SK	NB	NS	NL	PEI	Positive opinion	Negative opinion	Yes	No
<i>Base : all respondents</i>	1305	504	301	300	100	100	1089	216	65	1240
Strong knowledge	5%	6%	2%	4%	9%	4%	5%	4%	17%	4%
Average knowledge	33%	40%	25%	30%	38%	32%	33%	34%	43%	32%
Poor knowledge	40%	39%	42%	42%	35%	45%	42%	28%	26%	41%
No knowledge	22%	15%	31%	25%	18%	19%	20%	35%	14%	23%

2.1 FAMILIARITY WITH THE INDIGENOUS TOURISTIC OFFER | REST OF CANADA

Most respondents are also unfamiliar with the Indigenous tourism and cultural offering in the rest of Canada.

Contrary to the last question that referred specifically to their province, those who identify as First Nation, Metis or Inuit don't seem to know the Indigenous tourist and cultural offer in the rest of Canada better than those who don't identify as such.

Among respondents who have a negative opinion regarding Indigenous Peoples of the rest of Canada, four out of ten (41%) don't know the Indigenous Peoples's touristic offer at all.

Q15 : In general, how well do you feel you know the Indigenous tourism and cultural offering elsewhere in Canada?	TOTAL	PROVINCE					OPINION REGARDING INDIGENOUS PEOPLES OF CANADA		IDENTIFY AS FIRST NATION, METIS, OR INUIT	
		SK	NB	NS	NL	PEI	Positive opinion	Negative opinion	Yes	No
<i>Base : all respondents</i>	1305	504	301	300	100	100	1094	211	65	1240
Strong knowledge	2%	2%	1%	3%	3%	2%	2%	2%	11%	2%
Average knowledge	23%	27%	19%	18%	30%	26%	23%	20%	27%	23%
Poor knowledge	46%	48%	44%	48%	41%	53%	48%	36%	34%	47%
No knowledge	29%	23%	36%	32%	26%	20%	27%	41%	29%	29%

2.2 PERCEPTION OF THE INDIGENOUS TOURISTIC OFFER

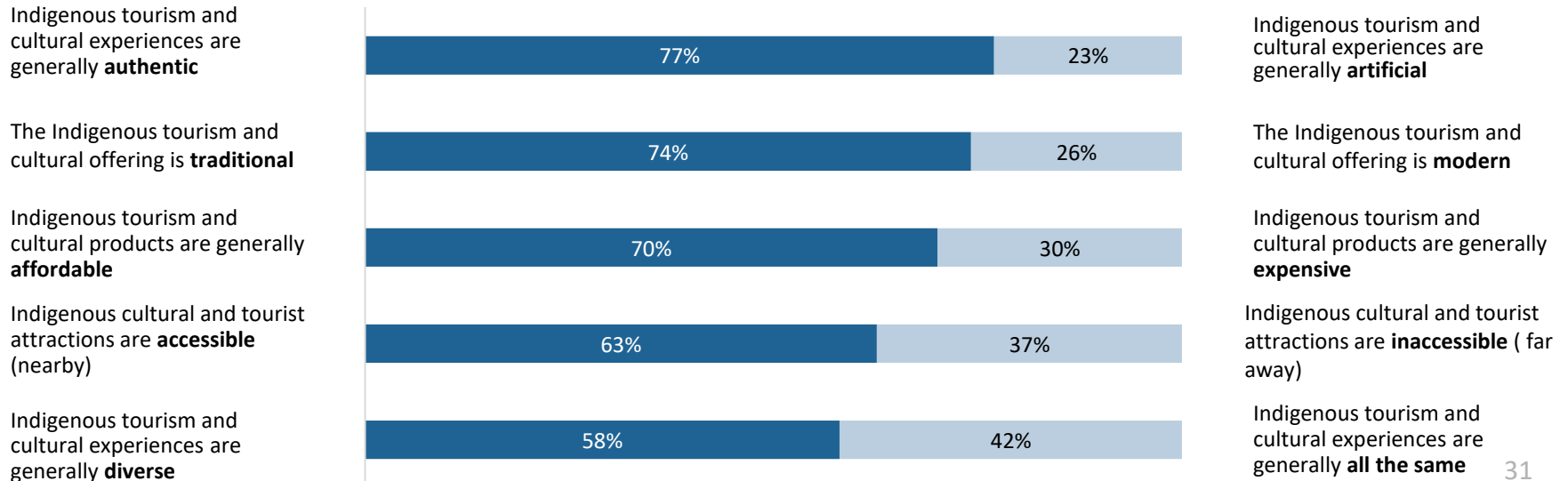
More than three out of four respondents believe that the Indigenous cultural and tourism experiences offered in their province is generally authentic (77%).

Most respondents also believe that offering in their province is traditional (74%), affordable (70%), accessible (63%), and diverse (53%).

Although more than half of respondents believe that the Indigenous cultural and tourism offering in their province is diverse, surveyed Canadians seem to have mixed opinions on that specific element, where 42% believe that these experiences are generally all the same.

Q16 : For each of the following pairs, which of the two statements best corresponds to your perception of the Indigenous cultural and tourism offering in your province

Base : all respondents (n=1305)

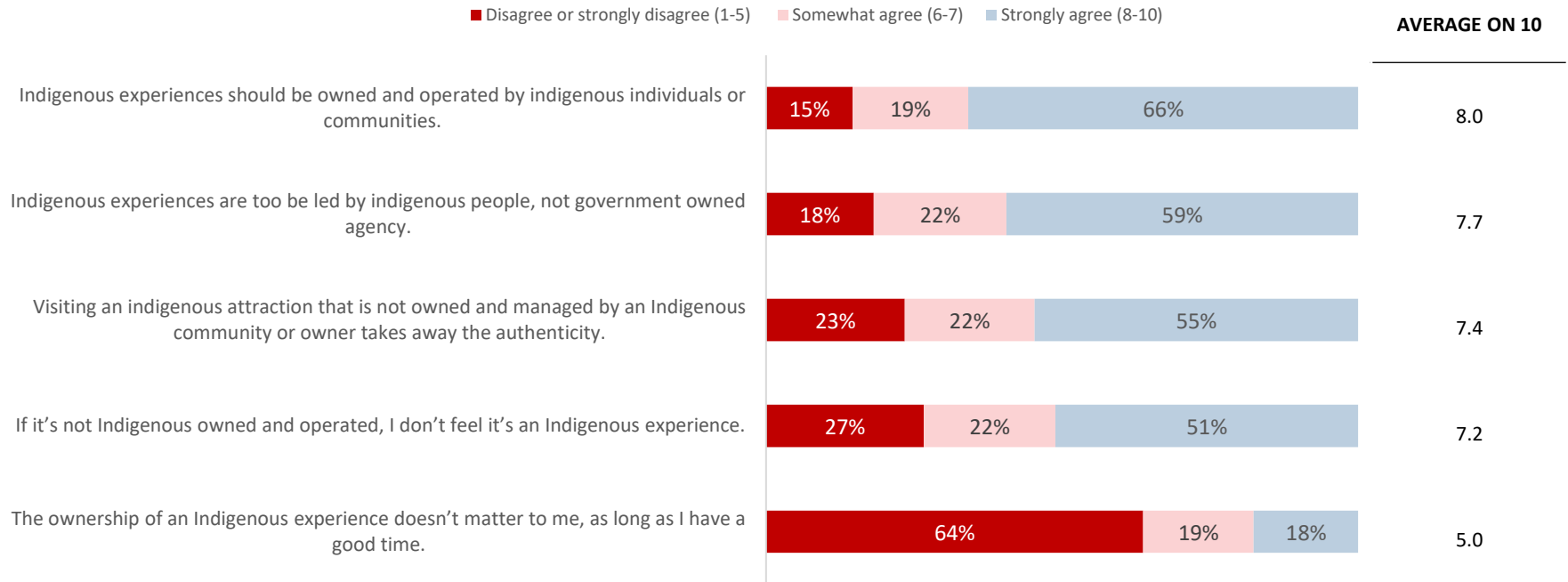


2.3 INTEREST IN LEARNING MORE ABOUT INDIGENOUS PEOPLES

Most respondents agree that Indigenous experiences should be owned, operated, and led by Indigenous individuals or communities and that visiting an Indigenous attraction that is not owned and managed by Indigenous individuals or communities would take away the authenticity and affect the experience.

QNEW2 : What is your level of agreement with the following statements?

Base : all respondents (n=1305)



2.3 INTEREST IN LEARNING MORE ABOUT INDIGENOUS PEOPLES

Although a high proportion of respondents believe that Indigenous cultural and tourist attractions should be considered as a path to reconciliation with Indigenous Peoples, the level of agreement towards statements regarding governmental implication for investing in Indigenous tourist and cultural infrastructures is more modest.

QNEW2 : What is your level of agreement with the following statements?

Base : all respondents (n=1305)

■ Disagree or strongly disagree (1-5) ■ Somewhat agree (6-7) ■ Strongly agree (8-10)

AVERAGE ON 10



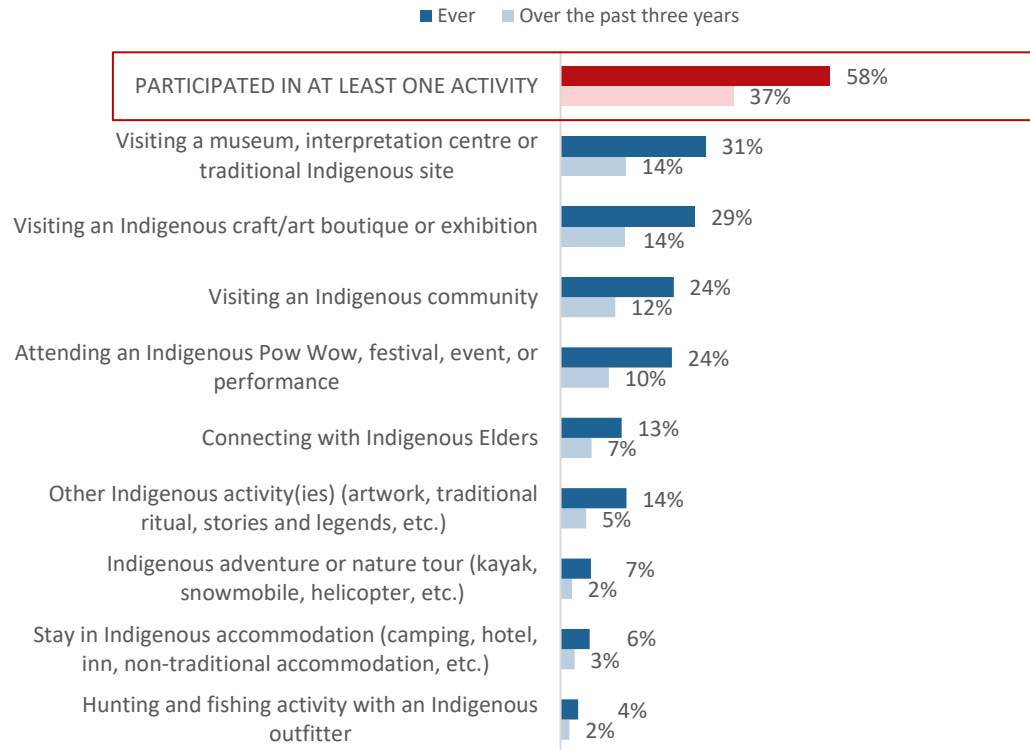
2.4 INDIGENOUS CULTURAL AND TOURISM ACTIVITY PARTICIPATION

More than half of surveyed Canadians (58%) have participated in an Indigenous cultural and tourism activity in their province before.

Compared to older respondents, a higher proportion of young respondents have done this kind of activity before (66% participated in at least one vs 56% of 35-54 years old and 55% of 55 years old and up).

Visiting a museum (31%) and visiting an Indigenous craft or art boutique or exhibition (29%) are the most popular activities.

Q17 : Have you ever taken part in an Indigenous cultural and tourism activity in your province ?
 Q18 : And among these activities, which ones did you participate in over the past three years?
 Base : all respondents (n=1305) multiple mentions



The total greater than 100% is due to multiple mention.

2.4 INDIGENOUS CULTURAL AND TOURISM ACTIVITY PARTICIPATION

A little more than one out of four respondents (28%) have taken part in an Indigenous tourism and cultural activity outside of their province in the past.



In total :

- **24%** of respondents have taken part in an Indigenous tourism and cultural activity **in their province and elsewhere** ;
- **34%** have taken part in an Indigenous tourism and cultural activity **in their province only** ;
- **4%** have taken part in an Indigenous tourism and cultural activity **outside of their province only** ;
- **38%** have **never taken part** in an Indigenous tourism and cultural activity

Q19 : Have you ever taken part in an Indigenous tourism and cultural activity outside of your province within the scope of a trip?	TOTAL	TOOK PART IN AN INDIGENOUS TOURISM AND CULTURAL ACTIVITY IN OWN PROVINCE	
		Yes	No
<i>Base : all respondents</i>	1305	767	538
TOTAL YES	28%	41%	10%
Yes, in another Canadian province	21%	32%	7%
Yes, in the south (Mexico, Cuba, Dominican Republic, Chile, Peru, etc.)	5%	8%	1%
Yes, in the United States	4%	7%	1%
Yes, in New Zealand or Australia	2%	4%	1%
Yes, elsewhere in the world (Nepal, Mongolia, Norway, etc.)	2%	3%	1%
No	68%	55%	86%
I'm not sure	5%	5%	5%

MAIN TAKEAWAYS

1

Either in their province or in the rest of Canada, surveyed Canadians don't know the Indigenous tourism and cultural offering very well.

More than half of surveyed Canadians (62% poor or no knowledge) don't know the Indigenous tourism and cultural offering in their province and in the rest of Canada (75% poor or no knowledge). Within the past three years, 37% of respondents have participated in an Indigenous cultural and tourism activity in their province. Visiting a museum and visiting an Indigenous art/craft boutique or exhibition are the most common: 14% of respondents engaged in those activities in the last three years.

2

Even if they don't know the Indigenous cultural and tourism offering very well, surveyed Canadians do have a good perception of it.

A majority of respondents believe that the Indigenous cultural and tourism offering in their province is authentic (77%), traditional (74%), affordable (70%), accessible (63%), and generally diverse (58%). Surveyed Canadians also believe that Indigenous Peoples should define and conduct the type of experiences they want to offer. In fact, a high majority of respondents agree that Indigenous experiences should be owned, operated, and led by Indigenous individuals or communities and that visiting an Indigenous attraction that is not owned and managed by Indigenous individuals or communities would take away the authenticity and affect the experience.

3. ATTRACTIVENESS OF THE INDIGENOUS CULTURAL AND TOURISM OFFER

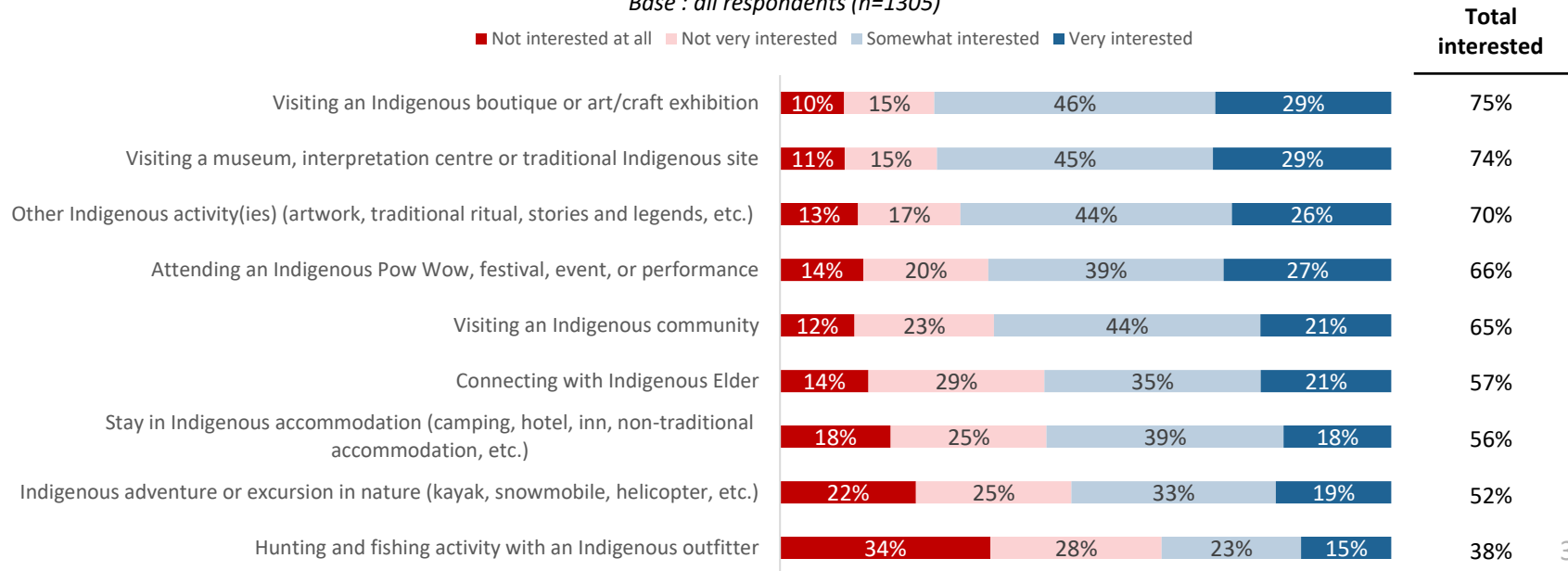
3.1 INTEREST IN VARIOUS TOURIST EXPERIENCES

Respondents are most interested in contemplative activities like visiting an Indigenous boutique or art/craft exhibition (75%) and visiting a museum (74%).

The level of interest tends to lower when activities are asking for a greater level of implication such as a stay in an Indigenous accommodation, an Indigenous adventure or excursion, or a hunting and fishing activity.

Q20 : What is your level of interest in the following Indigenous cultural and tourism activities in your province?

Base : all respondents (n=1305)



3.1 INTEREST IN VARIOUS TOURIST EXPERIENCES

The level of interest in different activities varies among sub-groups, specifically between men and women, as well as between age groups.

Activities that are more **contemplative**, such as visiting a museum, an interpretation center, a boutique, or an art exhibition are most popular among older respondents (55+).

On the other hand, activities that tend to be more **active** such as a stay in an Indigenous accommodation, an Indigenous adventure or excursion, or a hunting and fishing activity appears to be more popular among younger respondents.

Q20 : What is your level of interest in the following Indigenous cultural and tourism activities in your province?	TOTAL	GENDER		AGE		
		Men	Women	18-34	35-54	55+
<i>Base : all respondents – % interested</i>	1305	582	717	163	428	714
Visiting an Indigenous boutique or art/craft exhibition	75%	68%	81%	77%	72%	75%
Visiting a museum, interpretation centre or traditional Indigenous site	74%	73%	76%	71%	74%	76%
Other Indigenous activity(ies)	70%	65%	76%	78%	70%	67%
Attending an Indigenous Pow Wow, festival, event, or performance	66%	60%	72%	70%	68%	63%
Visiting an Indigenous community	65%	63%	67%	69%	64%	64%
Connecting with Indigenous Elders	57%	50%	62%	59%	60%	53%
Stay in Indigenous accommodation	56%	55%	57%	72%	58%	47%
Indigenous adventure or excursion in nature	52%	51%	52%	79%	59%	33%
Hunting and fishing activity with an Indigenous outfitter	38%	42%	33%	59%	43%	23%

3.1 INTEREST IN VARIOUS TOURIST EXPERIENCES

Those who took part in an Indigenous tourism and cultural activity in their own province in the past are more likely to be interested in participating in all of the presented activities.

These results show that respondents who participated an Indigenous tourism and cultural activity in the past enjoyed it and **are willing to renew the experience** somehow.

Q20 : What is your level of interest in the following Indigenous cultural and tourism activities in your province ?	TOOK PART IN AN INDIGENOUS TOURISM AND CULTURAL ACTIVITY IN OWN PROVINCE		
	TOTAL	Yes	No
<i>Base : all respondents – % interested</i>	1305	767	538
Visiting an Indigenous boutique or art/craft exhibition	75%	84%	62%
Visiting a museum, interpretation centre or traditional Indigenous site	74%	83%	63%
Other Indigenous activity(ies)	70%	79%	58%
Attending an Indigenous Pow Wow, festival, event, or performance	66%	77%	51%
Visiting an Indigenous community	65%	73%	54%
Connecting with Indigenous Elders	57%	65%	45%
Stay in Indigenous accommodation	56%	64%	46%
Indigenous adventure or excursion in nature	52%	59%	43%
Hunting and fishing activity with an Indigenous outfitter	38%	44%	29%

3.2 IDEAL EXPERIENCE: MARKET SIMULATOR

To define the ideal Indigenous tourism experience, respondents were asked to pretend they were planning a visit for this type of outing. They were presented different options and had to identify the combination that best suited their needs and interests based on the following:

Type of experience	Companions	Location	Guidance and interaction	Duration
Visit to a shop or exhibition of arts/arts/arts and arts	With friends	In an urban area	Without the accompaniment of a guide, and without interaction	Stay of 1 or 2 nights (weekend)
Visit to a museum, interpretation centre or traditional Indigenous site	As a couple	In an Indigenous community/village	Without the accompaniment of a guide, but with interaction	Stay of 3to 5 nights
Attend an Indigenous Pow Wow, festival, event, or show	Family (with children)	In nature	With accompaniment, but without interaction	Stay of 6 nights or more
Hunting and fishing activity in an Indigenous outfitter	Alone		With accompaniment AND interaction	Day trip (without overnight stay), starting from your place of residence
Adventure or nature excursion of an Indigenous character (kayak, snowmobile, helicopter, National or Provincial parks etc.)				
Stay in Indigenous accommodation (camping, hotel, inn, unusual accommodation, etc.)				

For each combination, respondents were asked to choose the option they preferred. This information was then used to determine the relative importance of each feature. The market simulator is available [here](#) and accessible through personalized access that has been provided to ITAC.

3.2 IDEAL EXPERIENCE: MARKET SIMULATOR

Among the five components, duration of the visit is the most influent, followed by the type of experience.

Here are the most attractive characteristics for each components :

Experience components	Type of experience	Companions	Location	Guidance and interaction	Duration
Relative importance	33%	20%	4%	4%	40%
Characteristics of an Indigenous tourism and cultural experience	Visit to a museum, interpretation centre or traditional Indigenous site	As a couple	In an Indigenous community/village	Without the accompaniment of a guide, but with interaction	Day trip (without overnight stay), starting from your place of residence
	Attend an Indigenous Pow Wow, festival, event, or show	With friends	In nature	With accompaniment AND interaction	Stay of 1 or 2 nights (weekend)



The optimal Indigenous experience would be short (day trip or stay of 1 or 2 nights) and would take place in an **Indigenous community/village** or **in nature**, with the **possibility to interact with members of the community** (with or without accompaniment) as a **couple** or with **friends**. **Visiting a museum** or attending an **Indigenous Pow Wow, festival or event** are the most sought-after activities.

3.3 ELEMENTS TO PROVIDE AN OPTIMAL VISITOR EXPERIENCE

For potential visitors*, the opportunity to learn about history and heritage is the most important aspect of an Indigenous tourism and cultural experience (33%).

Overall, value for money (31%), the opportunity to learn more about history and heritage (30%) and the beauty of the landscape, and the destination (25%) are the most important aspects to consider in order to offer the best visitor experience.

Q23 : Which of the following would you value most as part of an Indigenous tourism and cultural experience? In other words, what elements should be focused on to provide you with an optimal visitor experience?	TOTAL	AGE			POTENTIAL VISITORS	
		18-34	35-54	55+	Yes	No
<i>Base : all respondents, three possible mentions</i>	1305	163	428	714	1126	179
Value for money	31%	30%	33%	31%	30%	43%
The opportunity to learn more about history and heritage	30%	23%	27%	36%	33%	7%
Beauty of the landscape, the destination	25%	29%	25%	23%	26%	21%
Option of doing something new, an experience you have never had before	21%	22%	20%	22%	23%	8%
Ease of getting there (proximity/accessibility)	16%	19%	12%	18%	17%	13%
The socio-cultural activities offered (festivals, shows, etc.)	16%	19%	14%	16%	17%	4%

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* Potential visitors are Canadian's who manifested an interest in at least one Indigenous tourism and cultural activity. The total greater than 100% is due to multiple mention.

3.3 ELEMENTS TO PROVIDE AN OPTIMAL VISITOR EXPERIENCE

Q23 : Which of the following would you value most as part of an Indigenous tourism and cultural experience? In other words, what elements should be focused on to provide you with an optimal visitor experience?	TOTAL	AGE			POTENTIAL VISITORS	
		18-34	35-54	55+	Yes	No
<i>Base : all respondents, three possible mentions</i>	1305	163	428	714	1126	179
Possibility of combining outdoor, cultural and educational activities during the same stay	15%	18%	16%	14%	17%	5%
The cleanliness of the area	15%	11%	13%	18%	13%	28%
Safety of visitors	15%	13%	15%	16%	14%	26%
Option of interacting directly with members of the Indigenous community	13%	14%	8%	16%	15%	2%
Outdoor activities offered	12%	15%	12%	11%	13%	8%
The gastronomy, the good food	11%	9%	15%	9%	11%	9%
Accommodation on offer	10%	7%	10%	11%	10%	10%
The range of family activities	9%	15%	12%	3%	10%	4%
Weather/climate (no extreme conditions)	9%	9%	9%	10%	9%	14%
Offer a turnkey package (including accommodation, transport, food, etc.)	8%	6%	9%	8%	8%	8%
The offering of activities for adults without children (couples and friends)	8%	12%	8%	6%	9%	3%
Option to speak your own language	7%	7%	6%	8%	7%	6%

The total greater than 100% is due to multiple mention.

3.4 OBSTACLES TO PARTICIPATING IN AN INDIGENOUS ACTIVITY

Not knowing enough about Indigenous tourism and culture (30%), lack of time (25%), and distance (25%) are the three main obstacles that could keep potential visitors from taking part in an Indigenous activity.

Considering that lack of knowledge is the most common obstacle to participating in an Indigenous activity, and that, as seen previously, most respondents only have an average (60%) or poor (23%) level of knowledge of Indigenous People in their province, promoting the Indigenous tourism and cultural offer should be a priority.

Increasing accessibility should also be greatly considered since obstacles that were selected by a higher proportion of respondents are related to accessibility issues such as lack of knowledge (27%), distance (23%), and price (22%).

Q21 : What are, or would be, your main obstacles to participating in an Indigenous activity?	POTENTIAL VISITORS			AGE			PROVINCE				
	TOTAL	Yes	No	18-35	35-54	55+	SK	NB	NS	NL	PEI
<i>Base : all respondents, multiple mentions</i>	1305	1126	179	163	428	714	504	301	300	100	100
IDENTIFIED AT LEAST ONE OBSTACLE	82%	82%	87%	92%	82%	78%	85%	79%	83%	80%	85%
I don't know enough about Indigenous tourism and culture	27%	30%	6%	36%	26%	24%	23%	33%	32%	20%	16%
Not having the time (not a priority in my itinerary)	24%	25%	15%	40%	28%	13%	31%	22%	25%	15%	13%
The distance, too far from my home	23%	25%	7%	30%	24%	19%	25%	17%	20%	35%	25%

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3.4 OBSTACLES TO PARTICIPATING IN AN INDIGENOUS ACTIVITY

Q21 : What are, or would be, your main obstacles to participating in an Indigenous activity?	POTENTIAL VISITORS			AGE			PROVINCE				
	TOTAL	Yes	No	18-35	35-54	55+	SK	NB	NS	NL	PEI
<i>Base : all respondents, multiple mentions</i>	1305	1126	179	163	428	714	504	301	300	100	100
Too expensive, I don't have the budget for this type of activity	22%	22%	18%	22%	22%	21%	26%	18%	18%	29%	18%
The offer for Indigenous activities is insufficient in my region	18%	20%	1%	23%	15%	17%	18%	16%	17%	21%	23%
I'm not interested in the types of activities offered	17%	13%	47%	13%	18%	18%	16%	18%	18%	14%	19%
I don't feel welcome	12%	12%	12%	10%	15%	10%	16%	11%	11%	7%	6%
I'm not interested in Indigenous culture	11%	5%	51%	9%	11%	12%	13%	11%	10%	8%	9%
I don't participate in tourist and cultural activities in my province	11%	9%	20%	14%	7%	11%	10%	13%	10%	9%	14%
Mobility issues	2%	2%	0%	1%	0%	3%	2%	2%	2%	1%	1%
Other reason(s)	1%	1%	3%	0%	2%	1%	1%	1%	1%	1%	1%
No obstacles to taking part in an Indigenous activity	18%	18%	13%	8%	18%	22%	15%	21%	17%	20%	15%

The total greater than 100% is due to multiple mention.

3.5 TIME TO DESTINATION

Respondents were asked about the maximum duration they would be willing to travel in order to participate in an Indigenous touristic attraction. For a day trip, surveyed Canadians would be willing to travel, on average, a little less than two hours (1h50min). For a short stay, average travel time climbs up close to three hours (2h45min) and a little more than that (3h20min) for a stay of at least three nights.

Compared to others, respondents who live in Newfoundland and Labrador are willing to travel for a longer period of time to get to their destination (for all three options).

Q25 : Let's say you have to travel to visit an Indigenous tourist attraction. What would be the maximum time you would be willing to travel to your destination from your home?	A. For a day trip (without an overnight stay), starting from your place of residence	B. For a short stay (1 or 2 nights (weekend))	C. For a stay of at least three nights
<i>Base : all respondents</i>	<i>n=1305</i>		
30 minutes or less	9%	6%	6%
More than 30 minutes, but less than an hour	15%	7%	3%
More than an hour, but less than two	39%	17%	13%
More than two hours, but less than three	26%	31%	19%
More than three hours, but less than four	7%	23%	22%
More than four hours, but less than five	2%	8%	16%
More than five hours	3%	8%	21%
<i>Average (minutes)</i>	<i>110 (about 1h50min)</i>	<i>162 (about 2h45min)</i>	<i>200 (about 3h20min)</i>

3.6 SOURCES OF INFORMATION

Although internet searches remain the main source of information for most people, almost half of respondents (45%) would visit their local and/or provincial Indigenous Tourism website to get information if they were to plan an Indigenous tourism and cultural trip or activity.

Q22 : If you were to plan an Indigenous tourism and cultural trip/activity, what main sources of information you would use to find out about attractions and get information?	POTENTIAL VISITORS			ÂGE					
	TOTAL	Yes	No	18-24	25-34	35-44	45-54	55-64	65+
<i>Base : all respondents – multiple mentions</i>	1305	1126	179	36	127	185	243	309	405
USES AT LEAST ONE SOURCE	89%	92%	66%	89%	95%	83%	89%	87%	91%
Internet searches (websites, search engines, blogs, etc.)	55%	58%	30%	50%	58%	51%	55%	56%	56%
Local / Provincial Indigenous Tourism website	45%	48%	22%	39%	39%	33%	42%	51%	57%
Destination Indigenous national tourism website	34%	37%	12%	31%	30%	30%	34%	34%	42%
Family/friends/colleagues	32%	33%	21%	25%	41%	35%	29%	29%	30%
Tourist information offices	28%	29%	14%	10%	13%	18%	21%	35%	46%
Tourist pamphlets/brochures	28%	30%	17%	25%	21%	19%	24%	32%	40%
Social networks (Facebook, Instagram, Pinterest, etc.)	26%	29%	8%	34%	42%	35%	27%	16%	16%
Tour/travel guides	21%	22%	9%	15%	16%	15%	20%	24%	26%
Online travel agency (Airbnb, Expedia, Trip Advisor, etc.)	13%	13%	12%	13%	26%	12%	12%	13%	6%
Social Video Channels (YouTube, TikTok, etc.)	12%	13%	4%	19%	18%	13%	16%	12%	3%
Travel agent / agency	11%	11%	6%	17%	7%	7%	11%	14%	11%
Daily newspapers/magazines	7%	8%	4%	1%	8%	3%	6%	11%	10%
Programs and web TV on travel	7%	8%	2%	5%	5%	7%	8%	7%	8%
Other resource(s)	1%	1%	4%	0%	0%	1%	3%	2%	0%
I'm already familiar with the places I visit	3%	2%	6%	0%	2%	7%	3%	3%	2%
I don't know/I prefer not to answer	8%	5%	28%	11%	4%	10%	8%	10%	6%

The total greater than 100% is due to multiple mention.

3.7 TYPES OF INFORMATION

Overall, “must see” activities and attractions are the main type of information respondents would look for if they were to plan an Indigenous tourism and cultural trip/activity. Interest in different types of information does however vary among age groups.

QNEW3 : And what kind of information would you be looking for?	TOTAL	POTENTIAL VISITORS		ÂGE					
		Yes	No	18-24	25-34	35-44	45-54	55-64	65+
<i>Base : all respondents – multiple mentions</i>	1305	1126	179	36	127	185	243	309	405
“Must See” activities and attractions of the destination	48%	51%	27%	37%	51%	50%	46%	52%	47%
Events and festivals at destination	45%	47%	23%	35%	31%	42%	52%	46%	51%
Calendar of upcoming activities	44%	47%	21%	34%	34%	39%	45%	48%	54%
Accommodation suggestions	39%	40%	26%	27%	36%	34%	37%	41%	47%
Packages and promotional offers	38%	39%	30%	28%	44%	30%	40%	37%	41%
Photos and videos of the destination	37%	40%	19%	33%	44%	36%	33%	34%	39%
Practical information (how to get there, weather, etc.)	37%	40%	21%	33%	42%	33%	35%	34%	42%
Information about the locals, their lifestyle and traditions	36%	39%	14%	34%	37%	31%	32%	38%	39%
Attractions and activities off the beaten track (well-kept secrets)	34%	36%	16%	35%	29%	30%	37%	39%	33%
Restaurant recommendations	33%	34%	22%	33%	42%	25%	29%	29%	37%
Destination reviews from other travelers	31%	33%	17%	15%	39%	33%	35%	26%	32%
Itinerary and route suggestions	31%	33%	17%	36%	37%	27%	28%	27%	33%
General portrait of the destination (history, description of the districts, etc.)	30%	32%	11%	33%	22%	22%	30%	31%	38%
Advice from other travelers about the destination	29%	30%	17%	38%	29%	31%	24%	27%	28%
Maps	28%	28%	23%	19%	24%	26%	25%	29%	34%
Tourist guide of the destination	27%	28%	20%	9%	28%	28%	27%	28%	32%
Other information	0%	0%	0%	0%	0%	0%	0%	0%	1%
None in particular	1%	0%	10%	0%	0%	3%	2%	1%	1%
I don't know	1%	1%	1%	0%	0%	1%	1%	1%	1%

The total greater than 100% is due to multiple mention.

MAIN TAKEAWAYS

1

Surveyed Canadians are undeniably interested in Indigenous cultural and tourism activities.

Among a list of nine different activities, most respondents manifested their interest in eight of them. In general, surveyed Canadians tend to be more interested in contemplative activities, such as visiting an Indigenous boutique or art/craft exhibition (75% interested) or visiting a museum, interpretation center, or traditional Indigenous site (74% interested).

2

Respondents wish to learn more about the Indigenous history and heritage in a charming environment.

Aside from value for money (31%), the opportunity to learn more about history and heritage (30%) and the beauty of the landscape, and the destination (25%) are seen as the most essential aspects of Indigenous tourism and cultural experience.

3

Lack of knowledge and accessibility are the most common obstacles to participating in an Indigenous activity.

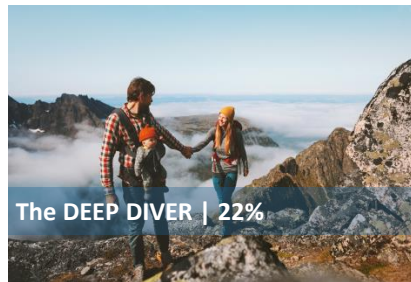
Besides not knowing enough about Indigenous tourism and culture, many obstacles that were selected by a higher proportion of respondents were related to accessibility issues such as lack of knowledge (27%), distance (23%), and price (22%).

4. SEGMENTATION ANALYSIS

SEGMENTS

The segmentation reflects the perceptions and interests of surveyed Canadians towards Indigenous Peoples of their province and the rest of Canada, of their perceptions of the Indigenous tourism and cultural offer, as well as the motivations and barriers that influence their participation.

Six segments define Canadians and their relationship with Indigenous Peoples.



The CURIOUS RATIONAL: 24%

Attractivity of Indigenous tourism and cultural activities :



Interested and open minded, the Curious rationals tend to be more willing than others to try new things. They have some interest in many Indigenous tourist and cultural activity but aren't very familiar with the offer. They recognize the diversity and authenticity of the Indigenous offer and are on the watch for activities that will allow them to learn by fully experiencing the Indigenous culture. That being said, they will need some encouragement to jump in and take part in Indigenous activities.

Opinion of Indigenous Peoples

In their province	In the rest of Canada
95%	92%
Good opinion	Good opinion

Knowledge of Indigenous Peoples

In their province	In the rest of Canada
67%	56%
Average knowledge	Average knowledge

Would be interested in learning more about

Their history	94%
Their traditions and heritage	94%
Their cultural and artistic environment	90%
Their current issues and realities	89%
Their languages	79%

Even if they don't know a lot about Indigenous Peoples, their perception is very positive.

Curious rationals consider Indigenous activities as a path to reconciliation with Indigenous Peoples. Consequently, they believe that public authorities have the responsibility to invest in Indigenous tourist and cultural infrastructures.

INTEREST FOR THE INDIGENOUS TOURISM AND CULTURAL OFFER

Familiarity with the offer

In their province	In the rest of Canada
41%	51%
Average knowledge	Poor knowledge

37% Have never taken part in a Indigenous tourism and cultural activity before.

*If they were to plan an Indigenous tourism and cultural trip or activity, Curious rationals would mainly use **internet** (51%) and **search on local or provincial Indigenous tourism websites** (45%). They would first look for **must see activities** (47%), as well as **events and festivals at destination** (47%).*

Main motivations

Value for money	31%
Opportunity to learn more about history and heritage	29%
The option of doing something new	23%
The beauty of the landscape and destination	23%

Main obstacles

Distance from home	31%
Too expensive	27%
Don't know enough about Indigenous tourism and culture	26%
Offer is insufficient in my region	24%

Interests

Indigenous Pow Wow, festival, event, or performance	96%
Indigenous boutique or art/craft exhibition	94%
Stay in Indigenous accommodation	94%
Museum, interpretation centre	93%
Other Indigenous activities	71%
Connecting with elders	88%
Visiting an Indigenous community	86%
Indigenous adventure or excursion in nature	85%
Hunting and fishing activity with Indigenous outfitter	59%



Among this segment, we can find :

- Men (44%) and women (54%)
- Canadians of all ages
- Mainly workers (61%)

TRAVELING HABITS

Travel group

Spouse
42%

Family
26%

Accommodation

With friends or family
44%

Hotel
(4 stars or more)
34%

Vacation planning

Choosing a destination

Opportunity to visit relatives
41%

Past experience/familiarity
39%

Looking for good value for their money Curious rationals are more likely to look out for good prices or offering of advantageous packages (35%) and quality of the accommodation (34%).

The SHY LEARNER: 13%

Attractivity of Indigenous tourism and cultural activities :



Shy learners have a positive opinion of Indigenous Peoples and are very keen on learning more about them, especially about their traditions and heritage as well as their current issues and realities. They don't know much about the Indigenous tourism and cultural offer but are interested in trying some activities. Shy learners are on the watch for activities that require a lower level of engagement, allowing them to learn more about the Indigenous culture at their own pace.

Opinion of Indigenous Peoples

Knowledge of Indigenous Peoples

Would be interested in learning more about

In their province	In the rest of Canada	In their province	In the rest of Canada
95%	93%	63%	51%
Good opinion	Good opinion	Average knowledge	Average knowledge

Their traditions and heritage	100%
Their current issues and realities	98%
Their history	95%
Their cultural and artistic environment	92%
Their languages	65%

Despite their average level of knowledge, Shy learners are very open minded and interested in learning more about Indigenous Peoples.

Shy learners are most interested in contemplative activities that require a lower level of engagement. Consequently, they don't have a lot of interest in participative activities like going on an Indigenous adventure or excursion in nature. In fact, most of them would not be willing to book an entire trip based around Indigenous culture. Shy learners prefer learning rather than experiencing.

INTEREST FOR THE INDIGENOUS TOURISM AND CULTURAL OFFER

Familiarity with the offer

Main motivations

Interests

In their province	In the rest of Canada
47%	62%
Poor knowledge	Poor knowledge

Opportunity to learn more about history and heritage	37%
Value for money	36%
The beauty of the landscape and destination	34%

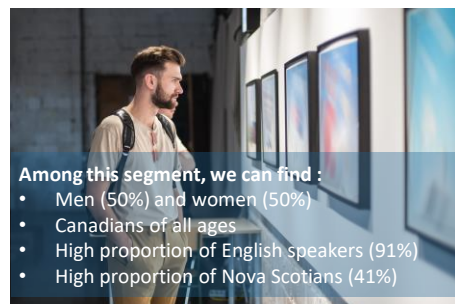
Indigenous boutique or art/craft exhibition	94%
Museum, interpretation centre	79%
Other Indigenous activities	71%
Visiting an Indigenous community	63%
Stay in Indigenous accommodation	35%
Indigenous Pow Wow, festival, event, or performance	34%
Indigenous adventure or excursion in nature	33%
Hunting and fishing activity with Indigenous outfitter	22%
Connecting with elders	12%

41% Have never taken part in a Indigenous tourism and cultural activity before.

*If they were to plan an Indigenous tourism and cultural trip or activity, Shy learners would mainly use **internet** (64%) and **search on local or provincial Indigenous tourism websites** (51%).*

Main obstacles

Don't know enough about Indigenous tourism and culture	35%
Not enough time	26%



Among this segment, we can find :

- Men (50%) and women (50%)
- Canadians of all ages
- High proportion of English speakers (91%)
- High proportion of Nova Scotians (41%)

TRAVELING HABITS

Travel group

Spouse
42%

Family
23%

Accommodation

With friends or family
44%

Hotel
(4 stars or more, most likely to)
44%

Vacation planning

Choosing a destination

Opportunity to visit relatives
48%

Past experience/familiarity
41%

Looking for a destination that will meet their high expectations

Shy learners want the opportunity to discover a new destination (34%) and tend to look out for good quality accommodations (34%). Price and offers are not as important to them (30%).

The INDIFFERENT: 15%

Attractivity of Indigenous tourism and cultural activities :



Indifferents have a generally good opinion of Indigenous Peoples but know very little about them and don't show much interest in doing so. They believe that Indigenous cultural and tourism experiences are generally all the same and have little interest in experiencing any kind of activity.

Opinion of Indigenous Peoples

Opinion of Indigenous Peoples		Knowledge of Indigenous Peoples	
In their province	In the rest of Canada	In their province	In the rest of Canada
80%	84%	33%	47%
Good opinion	Good opinion	Poor knowledge	Poor knowledge

Indifferents have a generally good opinion of Indigenous People but know very little about them. Of all segments, they know the least about Indigenous Peoples.

Their level of interest towards the Indigenous tourism and cultural offer is pretty low. To them, governments should not invest more in Indigenous tourism and cultural infrastructure, as they don't see these activities as a path to reconciliation.

Would be interested in learning more about

Their history	25%
Their cultural and artistic environment	24%
Their traditions and heritage	21%
Their current issues and realities	10%
Their languages	4%

INTEREST FOR THE INDIGENOUS TOURISM AND CULTURAL OFFER

Familiarity with the offer

In their province	In the rest of Canada
45%	45%
Poor knowledge	Poor knowledge

48% Have never taken part in a Indigenous tourism and cultural activity before.

*If they were to plan an Indigenous tourism and cultural trip or activity, Indifferents would mainly use **internet** (53%) and would mostly search for **must see activities** (48%), **calendar of activities** (39%) and **upcoming events festivals** (37%).*

Main motivations

Value for money	36%
Ease of getting there	27%
The opportunity to learn more about history and heritage	24%

Main obstacles

Not interested in the types of activities	36%
Don't know enough about Indigenous tourism and culture	26%
Too expensive	24%

Interests

Museum, interpretation centre	47%
Indigenous boutique or art/craft exhibition	42%
Other Indigenous activities	38%
Indigenous adventure or excursion in nature	37%
Visiting an Indigenous community	27%
Indigenous Pow Wow, festival, event, or performance	26%
Stay in Indigenous accommodation	25%
Hunting and fishing activity with Indigenous outfitter	19%
Connecting with elders	18%



Among this segment, we can find :

- Mainly men (56%)
- Canadians of all ages
- High proportion of Saskatchewanians (38%)

TRAVELING HABITS

Travel group

Spouse
35%

Family
23%

Accommodation

With friends or family
40%

Hotel
(3 stars or less)
31%

Vacation planning

Choosing a destination

Price or advantageous packages
46%

Looking for something familiar

When choosing a destination, this segment prefers to stay on familiar grounds and visit relatives (41%) or visit a place they already know and visited before (41%). Indifferents are least likely to choose a destination for the heritage and historical character (10%) and to discover new places (19%).

The MELLOW PASSIONATE: 13%

Attractivity of Indigenous tourism and cultural activities :



Mellow passionates are curious and love to get a glimpse of the history and culture of people they meet and places they visit. Even if they don't know much about the Indigenous tourism and cultural offer, they believe it is authentic and traditional. It is mainly through Indigenous art and by visiting museums, interpretation centers and traditional sites that they will fully immerse themselves in the Indigenous culture. They prefer social and cultural activities to excursions and more adventurous outings.

Opinion of Indigenous Peoples

In their province	In the rest of Canada	In their province	In the rest of Canada
91%	95%	70%	48%
Good opinion	Good opinion	Average knowledge	Poor knowledge

Mellow passionates have a very good opinion of Indigenous People and a relatively high knowledge of Indigenous Peoples in their province.

They consider that Indigenous activities are a path to reconciliation with Indigenous Peoples. Mellow passionates believe that these activities should be owned, operated and managed by Indigenous individuals or communities. Ownership of an Indigenous experience is essential.

INTEREST FOR THE INDIGENOUS TOURISM AND CULTURAL OFFER

Familiarity with the offer

In their province	In the rest of Canada
49%	56%
Poor knowledge	Poor knowledge

31% Have never taken part in a Indigenous tourism and cultural activity before.

If they were to plan a trip or activity, Mellow passionates would mainly use internet (69%) and search on local or provincial Indigenous tourism websites (57%). They would also look into more traditional touristic resources such as information offices (36%), pamphlets and brochures (39%). They would mainly look for events at destination (59%), calendar of upcoming events (57%), must see activities (56%), packages and promotional offers (51%), and accommodation suggestions (51%).

Main motivations

Opportunity to learn more about history and heritage	41%
Option of doing something new	28%
Value for money	27%
The beauty of the landscape and destination	25%
Ease of getting there	24%
Socio-cultural activities (festivals, etc.)	23%

Main obstacles

Don't know enough about Indigenous tourism and culture	31%
Not enough time	24%

Interests

Indigenous Pow Wow, festival, event, or performance	92%
Museum, interpretation centre	92%
Indigenous boutique or art/craft exhibition	89%
Other Indigenous activities	86%
Connecting with elders	81%
Visiting an Indigenous community	78%
Stay in Indigenous accommodation	38%
Indigenous adventure or excursion in nature	21%
Hunting and fishing activity with Indigenous outfitter	17%

Would be interested in learning more about

Their traditions and heritage	97%
Their history	96%
Their current issues and realities	95%
Their cultural and artistic environment	87%
Their languages	17%

Among this segment, we can find :

- Men (43%) and women (57%)
- Mainly 55 years old and up (62%)
- No children in household (83%)
- Retired (47%)

TRAVELING HABITS

Travel group

Spouse
51%

Accommodation

- With friends or family
52%
- Hotel (4 stars or more)
36%

Vacation planning

Choosing a destination

Opportunity to visit relatives
57%

Looking for an authentic experience in a familiar setting

Even if they prefer to visit a destination they already know (46%), Mellow passionates want to have the option of doing something new (28%). Authenticity is also important, as they are more likely to choose a destination for its heritage and historical character (26%).

The DEEP DIVER: 22%

Attractivity of Indigenous tourism and cultural activities :



Deep divers are looking to live a truly authentic Indigenous experience. Accompanied by their family, they are willing to take part in a variety of activities. The ideal Indigenous experience would allow the deep divers to combine activities of all kinds: excursions, adventures, events, museum outings and more. They are highly interested in learning all about Indigenous Peoples in a more challenging setting.

Opinion of Indigenous Peoples

In their province

97%

Good opinion

In the rest of Canada

98%

Good opinion

Knowledge of Indigenous Peoples

In their province

53%

Average knowledge

In the rest of Canada

57%

Average knowledge

Although most Deep divers have an average knowledge of Indigenous Peoples, a high proportion of them say they have a strong knowledge of Indigenous People in their province (28%) and in the rest of Canada (13%).

This segment strongly believes that Indigenous cultural and tourist activities are a path to reconciliation with Indigenous Peoples and that public authorities such as the provincial and federal government have the responsibility to invest in Indigenous tourist and cultural infrastructures.

Would be interested in learning more about

Their history	98%
Their traditions and heritage	98%
Their cultural and artistic environment	98%
Their current issues and realities	98%
Their languages	88%

INTEREST FOR THE INDIGENOUS TOURISM AND CULTURAL OFFER

Familiarity with the offer

In their province

36%

Average knowledge

In the rest of Canada

39%

Poor knowledge

19% Have never taken part in a Indigenous tourism and cultural activity before.

If they were to plan an Indigenous tourism and cultural trip or activity, this segment would mainly use online resources like **internet** (56%), **local or provincial Indigenous tourism websites** (53%), **Destination Indigenous national tourism website** (41%) or on **social media** (40%). They would also ask **family and friends** (38%). They would be most interested in **information about the locals, their lifestyle and traditions** (58%) and **upcoming events** (52%).

Main motivations

Opportunity to learn more about history and heritage	36%
The beauty of the landscape and destination	28%
The option of doing something new	27%
Option of interacting directly with members of Indigenous communities	24%
The possibility of combining outdoor, cultural and educational activities during the same stay	22%

Main obstacles

Don't know enough about Indigenous tourism and culture	31%
Distance from home	28%

Interests

Indigenous boutique or art/craft exhibition	97%
Indigenous Pow Wow, festival, event, or performance	96%
Visiting an Indigenous community	95%
Other Indigenous activities	95%
Museum, interpretation centre	93%
Stay in Indigenous accommodation	92%
Connecting with elders	92%
Indigenous adventure or excursion in nature	86%
Hunting and fishing activity with Indigenous outfitter	66%

Deep divers are more likely to be very interested in all the activities.

Among this segment, we can find :

- Mostly women (62%)
- Young adults (38% 18-34 years old)
- Children in household (37%)
- Workers (62%)

TRAVELING HABITS

Travel group

Spouse

33%

Family

26%

Friends

19%

Accommodation



With friends or family
48%



Hotel
(3 stars or less)
24%

Vacation planning

Choosing a destination

Opportunity to learn something new
44%
Good prices and advantageous offers
39%

Looking to engage in various activities

This segment is more likely to look out for destinations offering the opportunity to engage in urban and nature activities (29%) and to take part in a variety of cultural activities (25%).

The STUBBORN: 13%

Attractivity of Indigenous tourism and cultural activities :



Chances of convincing the Stubborn in taking part in an Indigenous activity are pretty unlikely. Most of them have a bad opinion of Indigenous Peoples. Their lack of knowledge and interest in the types of activity are the main reasons why they wouldn't take part in an Indigenous activity. They show no interest in learning more about the Indigenous tourism and cultural offer.

Opinion of Indigenous Peoples

In their province	In the rest of Canada
55% Bad opinion (20% very negative)	56% Bad opinion (18% very negative)

Knowledge of Indigenous Peoples

In their province	In the rest of Canada
47% Average knowledge (11% no knowledge)	44% Average knowledge (13% no knowledge)

Would be interested in learning more about

Their history	14%
Their traditions and heritage	14%
Their current issues and realities	10%
Their cultural and artistic environment	6%
Their languages	3%

Even if they have an average knowledge of Indigenous Peoples, the Stubborn have a generally bad opinion of them.

For the Stubborn, ownership of an Indigenous experience doesn't really matter, having a good time is more important.

INTEREST FOR THE INDIGENOUS TOURISM AND CULTURAL OFFER

Familiarity with the offer

In their province	In the rest of Canada
47% No knowledge	52% No knowledge

65% Have never taken part in a Indigenous tourism and cultural activity before.

As the interest in learning more about Indigenous Peoples is very low, a higher proportion (23%) of respondents in this segment would not know where to look for information about the Indigenous tourism and cultural offer.

Main motivations

Value for money	44%
Cleanliness of the area	29%
Safety of visitors	26%

Main obstacles

Not interested in the types of activities offered	51%
Don't know enough about Indigenous tourism and culture	51%
I don't participate in tourist and cultural activities in my province	20%
Too expensive	20%
I don't feel welcome	18%

Interests

Indigenous boutique or art/craft exhibition	22%
Museum, interpretation centre	16%
Indigenous Pow Wow, festival, event, or performance	11%
Other Indigenous activities	11%
Visiting an Indigenous community	10%
Hunting and fishing activity with Indigenous outfitter	7%
Connecting with elders	6%
Indigenous adventure or excursion in nature	5%
Stay in Indigenous accommodation	3%



Stubborns are more likely to have no interest at all in all the activities.



- Among this segment, we can find :
- Mostly men (56%)
 - Mostly 55 years old and up (52%)
 - No children in household (80%)
 - High proportion of English speakers (90%)

TRAVELING HABITS

Travel group

Spouse
50%

Accommodation

With friends or family
47%
Hotel
(4 stars or more)
34%

Vacation planning

Choosing a destination

Opportunity to visit relatives
49%

Good prices and advantageous offers
44%

Looking to do as always

Stubborns mainly go on vacation to visit family. They are least likely to choose a destination for its heritage and historical character (12%) as well as for the variety of cultural activities (9%).

MAIN TAKEAWAYS

Segments are presented in order, from highest potential to lowest.

High potential



Moderate potential



Low potential



Most efforts should be concentrated in reaching Deep divers, and convincing Curious rationals.

Some efforts should also be dedicated in attracting segments that present a more moderate level of potential, Shy learners and Mellow passionate.

5. TRAVELLING HABITS

5.1 LEISURE STAY AND DAY TRIP IN THE PAST 24 MONTHS | SURVEYED PROVINCES

Even if day trips tend to be more popular, about half of respondents took at least one leisure trip in their province over the last two years.

FILTRE1+FILTRE2* : In the past 24 months, in which Canadian province(s) have you taken at least one leisure trip? + In the past 24 months, in which Canadian province(s) or territories have you taken at least one day trip?	PROVINCE					
	TOTAL	SK	NB	NS	NL	PEI
<i>Base : all respondents – multiple mentions</i>	1305	504	301	300	100	100
Saskatchewan	30%	100%	2%	1%	2%	2%
Leisure stay	19%	65%	1%	1%	2%	2%
Day trip	27%	91%	0%	0%	1%	0%
New Brunswick	34%	1%	86%	32%	10%	51%
Leisure stay	22%	1%	47%	26%	9%	28%
Day trip	25%	1%	79%	14%	3%	36%
Nova Scotia	41%	2%	37%	94%	20%	44%
Leisure stay	29%	2%	26%	62%	19%	35%
Day trip	32%	0%	21%	89%	3%	22%
Newfoundland and Labrador	16%	1%	2%	4%	95%	3%
Leisure stay	11%	1%	2%	4%	62%	2%
Day trip	13%	0%	0%	1%	86%	1%
Prince Edward Island	18%	1%	25%	24%	10%	79%
Leisure stay	15%	1%	20%	21%	10%	47%
Day trip	6%	0%	11%	4%	3%	56%

The question FILTRE1 precised : The term “leisure stay” means any stay as part of a trip including at least one night away from your home (EXCLUDING business trips, all-inclusive type trips, or trips to your own secondary. The question precised FILTRE2: A “day trip” means a visit outside your area involving travel of 40 km or more from your home, but without a stay in accommodation (return home). residence). Residents of Atlantic provinces (NB, NS, NL, and PEI) had to have done a leisure trip and a day trip in their province or in another Atlantic province.

5.1 LEISURE STAY AND DAY TRIP IN THE PAST 24 MONTHS | OTHER PROVINCES

FILTRE1+FILTRE2* : In the past 24 months, in which Canadian province(s) have you taken at least one leisure trip? + In the past 24 months, in which Canadian province(s) or territories have you taken at least one day trip?	PROVINCE					
	TOTAL	SK	NB	NS	NL	PEI
<i>Base : all respondents – multiple mentions</i>	1305	504	301	300	100	100
Alberta	17%	47%	5%	3%	7%	7%
Leisure stay	15%	42%	4%	3%	6%	7%
Day trip	5%	14%	2%	0%	2%	3%
Ontario	17%	10%	19%	17%	24%	23%
Leisure stay	15%	10%	17%	15%	22%	21%
Day trip	4%	2%	4%	3%	10%	6%
British Columbia	9%	24%	4%	3%	4%	3%
Leisure stay	9%	23%	3%	3%	3%	3%
Day trip	2%	4%	1%	0%	2%	0%
Quebec	11%	4%	24%	9%	7%	12%
Leisure stay	9%	3%	20%	8%	6%	10%
Day trip	4%	0%	13%	2%	1%	4%
Manitoba	5%	14%	2%	1%	3%	2%
Leisure stay	5%	12%	1%	1%	3%	2%
Day trip	2%	6%	0%	0%	1%	2%

The question FILTRE1 precised : The term “leisure stay” means any stay as part of a trip including at least one night away from your home (EXCLUDING business trips, all-inclusive type trips, or trips to your own secondary residence).
 The question precised FILTRE2: A “day trip” means a visit outside your area involving travel of 40 km or more from your home, but without a stay in accommodation (return home). residence).

5.2 TYPES OF ACCOMMODATION

When traveling in their province or neighboring provinces, most respondents usually stay in a hotel (32% 4 stars or more, 24% 3 stars or more). Staying with family and friends is also preferred by almost half of surveyed Canadians (46%).

Q3 : What are the main types of accommodation you usually stay at when you travel within your province or neighboring provinces?	TOTAL	PROVINCE					POTENTIAL VISITOR	
		SK	NB	NS	NL	PEI	Yes	No
<i>Base : all respondents – multiple mentions</i>	1305	504	301	300	100	100	1126	179
With family or friends	46%	49%	43%	42%	52%	34%	46%	46%
Hotel/inn 4 stars or more	32%	32%	34%	36%	24%	27%	32%	30%
Hotel/inn 3 stars or less	24%	28%	22%	22%	20%	35%	23%	30%
Cottage/country house for rent (Airbnb.com, HomeAway.com, VRBO, FlipKey, etc.)	17%	10%	19%	20%	22%	9%	18%	11%
Camping (tent, caravan, ready-to-camp, etc.)	12%	19%	11%	9%	8%	7%	13%	9%
Bed and breakfast (lodge)	6%	4%	3%	9%	8%	5%	7%	0%
Non-traditional accommodation (cabine, yurt, tipi, dome, etc.)	2%	2%	3%	2%	3%	2%	3%	2%
Youth hostel	1%	1%	1%	0%	3%	0%	1%	0%
Outfitter	0%	0%	0%	0%	0%	0%	0%	0%
I don't know/I prefer not to answer	3%	2%	2%	5%	0%	6%	2%	6%

Note : respondents were asked to refer to their habits before the arrival of the COVID-19 pandemic and over the past two years.
The total greater than 100% is due to multiple mention.

5.3 TRAVEL GROUP

The travel group composition varies between age groups and whether or not kids are part of the household.

Q4 : Which of these statements best describes your travel group when you travel within your province or neighboring provinces? Do you usually travel...?	TOTAL	AGE			KIDS IN HOUSEHOLD		PROVINCE				
		18-34	35-54	55+	Yes	No	SK	NB	NS	NL	PEI
<i>Base : all respondents</i>	1305	163	428	714	298	1004	504	301	300	100	100
As a couple (spouse only)	41%	26%	29%	58%	14%	51%	37%	39%	43%	48%	42%
With family (with child(ren))	23%	21%	42%	10%	64%	8%	29%	22%	22%	13%	20%
Alone	13%	14%	14%	12%	7%	16%	12%	11%	12%	20%	25%
With friends	12%	22%	9%	9%	8%	13%	10%	17%	11%	9%	12%
With extended family (brother, sister, parents, grandparents, etc.)	9%	14%	5%	10%	6%	10%	8%	9%	11%	11%	2%
With an organized group	1%	1%	0%	1%	0%	1%	1%	1%	0%	0%	0%
Other	0%	1%	1%	0%	1%	0%	1%	0%	0%	0%	0%
I prefer not to answer	1%	2%	0%	0%	0%	1%	1%	1%	0%	0%	0%

5.4 REASONS TO GO ON A TRIP | SUMMERTIME

During summer, landscape, nature, and contemplation is the main motive for planning a trip or an excursion close to home or in another province.

Compared to others, potential visitors are more likely to plan a trip or an excursion for this particular motive (44%), as well as for events and entertainment (32%).

Men are more likely than women to plan a trip or an excursion around culture and history (21% vs 13% of women) and around sports and adventure (15%, vs 9% of women).

Main motives also vary among provinces.

Q5 : What are your main motives for trips or excursions within your province or neighboring provinces in the summer ?	PROVINCE						POTENTIAL VISITOR	
	TOTAL	SK	NB	NS	NL	PEI	Yes	No
<i>Base : all respondents – multiple mentions</i>	1305	504	301	300	100	100	1126	179
Landscapes, nature and contemplation	43%	33%	48%	48%	43%	44%	44%	33%
Wellness and renewal	32%	31%	28%	30%	43%	30%	32%	32%
Events and entertainment	31%	38%	30%	29%	22%	29%	32%	22%
Culture and history	17%	12%	18%	20%	22%	10%	17%	15%
Sports and adventure	12%	15%	19%	5%	5%	9%	11%	14%
Gastronomy and agrotourism	7%	5%	7%	10%	4%	5%	7%	6%
I don't know/I prefer not to answer	9%	12%	5%	9%	6%	8%	8%	15%

5.4 REASONS TO GO ON A TRIP | WINTERTIME

Wellness and renewal, as well as events and entertainment, are the main motives for planning a trip or an excursion close to home or in another province during winter.

Compared to others, potential visitors are more likely to plan a trip or an excursion for these two specific motives (29%), as well as for landscape, nature, and contemplation (28%).

Men are more likely than women to plan a trip or an excursion around sports and adventure (20% vs 12% of women).

Younger respondents (18-34) are more likely to plan a trip or an excursion around landscapes, nature, and contemplation (41%), as well as sports and adventure (26%).

Main motives also vary among provinces.

Q6 : And in the winter? What are your main reasons for trips or excursions within your province or neighboring provinces in the wintertime?	TOTAL	PROVINCE					POTENTIAL VISITOR	
		SK	NB	NS	NL	PEI	Yes	No
<i>Base : all respondents – two possible answers</i>	1305	504	301	300	100	100	1126	179
Wellness and renewal	28%	28%	28%	25%	37%	20%	29%	21%
Events and entertainment	28%	32%	29%	27%	21%	25%	29%	20%
Landscapes, nature and contemplation	27%	17%	31%	33%	24%	29%	28%	17%
Sports and adventure	16%	22%	21%	8%	12%	16%	17%	12%
Culture and history	10%	8%	6%	11%	20%	15%	11%	7%
Gastronomy and agrotourism	8%	5%	10%	11%	6%	4%	8%	6%
I don't know/I prefer not to answer	19%	21%	15%	20%	15%	23%	16%	37%

5.5 CHOOSING A DESTINATION

The three main criterias when choosing a destination for a trip close to home or in a neighboring province are the opportunity to visit relatives (44%), the price (39%) and familiarity with the destination.

Criteria vary among age groups and province.

Q7 : What are your main criteria when choosing a destination for a trip to your province or neighboring provinces?	TOTAL	AGE			PROVINCE					POTENTIAL VISITOR	
		18-34	35-54	55+	SK	NB	NS	NL	PEI	Yes	No
<i>Base : all respondents – multiple mentions</i>	1305	163	428	714	504	301	300	100	100	1126	179
Opportunity to visit relatives (friends/family) at the destination	44%	35%	39%	53%	50%	41%	41%	44%	46%	44%	43%
Price, or an offering of advantageous packages	39%	42%	41%	36%	36%	46%	38%	39%	29%	39%	38%
Past experience/familiarity with the destination	39%	35%	41%	41%	36%	39%	41%	44%	39%	39%	38%
Opportunity to discover a new destination (which you have never visited before)	31%	35%	27%	32%	25%	31%	40%	29%	22%	32%	23%
Quality of the accommodation	28%	29%	26%	30%	24%	31%	29%	35%	19%	28%	28%
Proximity to your place of residence (you don't like to drive too much/take a plane)	24%	27%	23%	24%	19%	28%	24%	31%	23%	24%	27%
Opportunity to engage in urban and nature activities on the same trip	21%	28%	22%	17%	18%	18%	24%	27%	16%	22%	12%
Hospitality of the local people	20%	19%	17%	23%	15%	18%	23%	30%	19%	21%	16%

Continued on next page

5.5 CHOOSING A DESTINATION

Q7 : What are your main criteria when choosing a destination for a trip to your province or neighboring provinces?	TOTAL	AGE			PROVINCE					POTENTIAL VISITOR	
		18-34	35-54	55+	SK	NB	NS	NL	PEI	Yes	No
<i>Base : all respondents – multiple mentions</i>	1305	163	428	714	504	301	300	100	100	1126	179
Heritage and historical character	19%	19%	17%	20%	12%	18%	22%	28%	14%	20%	10%
Variety of cultural activities	16%	19%	17%	13%	12%	19%	16%	19%	10%	17%	5%
Availability of fine dining restaurants	14%	15%	13%	15%	11%	18%	17%	9%	14%	15%	13%
Ability of the destination to accommodate a family with children	10%	8%	19%	4%	13%	10%	9%	6%	8%	10%	6%
Option to speak your own language	9%	11%	9%	8%	7%	16%	7%	6%	4%	9%	9%
Prestige of the destination	6%	10%	6%	3%	6%	4%	6%	6%	2%	6%	2%
Variety and vitality of the nightlife	5%	10%	5%	2%	6%	4%	3%	9%	3%	5%	1%
The possibility of practicing activities/outdoor activities/sports activities	1%	1%	1%	1%	2%	2%	1%	0%	3%	1%	1%
Shopping	1%	0%	1%	1%	1%	1%	1%	0%	1%	1%	2%
The beauty of the place / the landscape / the nature	0%	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%
Other reason(s)	2%	2%	1%	2%	3%	1%	3%	0%	1%	2%	5%
I don't know/I prefer not to answer	4%	4%	6%	3%	5%	3%	6%	2%	4%	3%	9%

The total greater than 100% is due to multiple mention.

MAIN TAKEAWAYS

1

Staying in a hotel or with friends or family are the two most common types of accommodations

When traveling in their province or neighboring provinces, most respondents usually stay in a hotel (32% 4 stars or more, 24% 3 stars or more). Staying with family and friends is also preferred by almost half of surveyed Canadians (46%).

2

Reasons to take a trip or to plan an excursion close to home or in another province vary between seasons.

Landscape, nature, and contemplation is the main motive for planning a trip or an excursion close to home or in another province during summer. In the wintertime, the main motives for planning a trip or an excursion close to home is wellness and renewal, as well as events and entertainment.



RESPONDENT PROFILE

RESPONDENT PROFILE

All respondents	Total (n=1305)	SK (n=504)	NB (n=301)	NS (n=300)	NL (n=100)	PEI (n=100)
Gender						
Male	46%	45%	47%	47%	47%	43%
Female	53%	53%	51%	53%	53%	57%
Age						
18-24	7%	9%	9%	4%	8%	7%
25-34	16%	19%	14%	20%	9%	8%
35-44	16%	18%	15%	14%	18%	22%
45-54	16%	16%	17%	16%	17%	18%
55-64	19%	17%	19%	20%	21%	19%
65-74	19%	15%	19%	20%	23%	18%
75 and up	6%	7%	8%	6%	4%	8%
Household income						
Less than \$19 999	5%	6%	4%	6%	3%	1%
Between \$20 000 and \$39 999	16%	14%	16%	14%	19%	22%
Between \$40 000 and \$59 999	17%	18%	18%	15%	17%	12%
Between \$60 000 and \$79 999	14%	14%	20%	12%	12%	13%
Between \$80 000 and \$99 999	13%	16%	15%	14%	6%	10%
\$100 000 or more	25%	23%	19%	30%	33%	24%
I prefer not to answer	9%	9%	8%	9%	11%	17%

RESPONDENT PROFILE

All respondents	Total (n=1305)	SK (n=504)	NB (n=301)	NS (n=300)	NL (n=100)	PEI (n=100)
Education level						
Elementary/highschool	22%	23%	23%	22%	18%	19%
College	31%	27%	33%	29%	37%	40%
University	47%	49%	43%	49%	45%	41%
Kids in household						
Yes	27%	36%	25%	21%	24%	26%
No	73%	63%	74%	79%	76%	74%
Spoken language						
French	9%	3%	30%	4%	1%	3%
English	84%	85%	65%	91%	96%	92%
Other	7%	13%	5%	5%	2%	6%
Employment status						
Worker	56%	59%	54%	54%	55%	52%
Student	4%	5%	6%	4%	2%	3%
Retired	30%	25%	33%	33%	26%	39%
Other	9%	10%	8%	7%	16%	6%

RESPONDENT PROFILE

All respondents	Total (n=1305)	SK (n=504)	NB (n=301)	NS (n=300)	NL (n=100)	PEI (n=100)
Province						
Saskatchewan	29%	100%	0%	0%	0%	0%
New Brunswick	24%	0%	100%	0%	0%	0%
Nova Scotia	29%	0%	0%	100%	0%	0%
Newfoundland and Labrador	15%	0%	0%	0%	100%	0%
Prince Edward Island	4%	0%	0%	0%	0%	100%
Identify as First Nation, Metis, or Inuit						
Yes	5%	8%	2%	3%	8%	7%
No	95%	92%	98%	97%	92%	93%



ANNEXES

ANNEX 1 : RESULTS BY PROVINCE

Q8A : In general, do you have a very positive, somewhat positive, somewhat negative or very negative opinion of Indigenous Peoples in *your province*?

	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
POSITIVE OPINION	86%	76%	89%	90%	91%	91%
Very positive opinion	43%	29%	43%	48%	60%	39%
Somewhat positive opinion	43%	47%	46%	42%	32%	52%
NEGATIVE OPINION	14%	24%	11%	10%	9%	9%
Somewhat negative opinion	11%	19%	8%	7%	8%	7%
Very negative opinion	3%	5%	3%	3%	1%	2%

Q8B : In general, do you have a very positive, somewhat positive, somewhat negative or very negative opinion of Indigenous Peoples in the rest of Canada?

	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
POSITIVE OPINION	86%	80%	90%	89%	89%	89%
Very positive opinion	38%	27%	40%	42%	49%	32%
Somewhat positive opinion	49%	52%	49%	47%	41%	57%
NEGATIVE OPINION	14%	20%	10%	11%	11%	11%
Somewhat negative opinion	11%	17%	7%	8%	9%	8%
Very negative opinion	3%	3%	3%	3%	1%	2%

ANNEX 1 : RESULTS BY PROVINCE

QNEW1 : To the best of your knowledge, are the following terms suitable, or correct, when referring to Indigenous Peoples?

	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents – % yes</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
Indigenous Peoples	84%	83%	81%	87%	83%	78%
First Nations	78%	78%	81%	78%	73%	69%
Indigenous Canadians	66%	68%	63%	67%	66%	64%
Native Canadians	47%	45%	51%	45%	51%	49%
Aboriginals	46%	49%	44%	42%	49%	43%
Natives	34%	34%	34%	33%	36%	35%
Indians	16%	21%	14%	11%	18%	12%

ANNEX 1 : RESULTS BY PROVINCE

Q9A : In general, how well do you feel you know the Indigenous Peoples of your province?	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
Strong knowledge	13%	17%	8%	13%	13%	8%
Average knowledge	60%	59%	53%	64%	65%	53%
Poor knowledge	24%	21%	32%	19%	20%	33%
No knowledge	4%	3%	6%	3%	2%	7%

Q9B : In general, how well do you feel you know the Indigenous Peoples or rest of Canada?	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
Strong knowledge	6%	8%	4%	4%	7%	3%
Average knowledge	51%	52%	40%	54%	61%	57%
Poor knowledge	38%	35%	50%	37%	29%	38%
No knowledge	5%	5%	6%	5%	3%	3%

ANNEX 1 : RESULTS BY PROVINCE

Q10 : Thinking about the Indigenous Peoples of **your province**, how would you describe your level of knowledge of..

	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
THEIR CURRENT ISSUES AND REALITIES						
Strong knowledge	12%	16%	9%	11%	12%	2%
Average knowledge	60%	59%	57%	63%	61%	64%
Poor knowledge	23%	21%	25%	22%	19%	31%
No knowledge	6%	3%	9%	4%	7%	2%
THEIR HISTORY						
Strong knowledge	10%	13%	7%	10%	5%	11%
Average knowledge	54%	55%	47%	54%	62%	49%
Poor knowledge	32%	29%	38%	32%	28%	37%
No knowledge	4%	3%	7%	3%	5%	3%
THEIR TRADITIONS AND HERITAGE						
Strong knowledge	7%	9%	5%	9%	4%	0%
Average knowledge	47%	49%	40%	45%	58%	52%
Poor knowledge	38%	38%	44%	39%	27%	43%
No knowledge	7%	4%	11%	7%	11%	5%
THEIR CULTURAL AND ARTISTIC BACKGROUND						
Strong knowledge	7%	8%	4%	8%	9%	2%
Average knowledge	50%	55%	40%	50%	56%	49%
Poor knowledge	37%	34%	44%	36%	31%	46%
No knowledge	6%	4%	11%	6%	5%	2%
THEIR LANGUAGES						
Strong knowledge	2%	2%	5%	2%	1%	2%
Average knowledge	26%	28%	20%	24%	36%	29%
Poor knowledge	44%	42%	43%	50%	36%	44%
No knowledge	28%	28%	33%	24%	27%	25%

ANNEX 1 : RESULTS BY PROVINCE

Q13 : What would be your interest in learning more about...?	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents – % interested</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
The history of Indigenous Peoples	75%	65%	78%	78%	80%	76%
The traditions and heritage of Indigenous Peoples	74%	65%	77%	80%	78%	80%
The issues and realities of Indigenous Peoples today	71%	60%	75%	74%	79%	67%
The Indigenous cultural and artistic environment	71%	63%	69%	75%	78%	74%
Indigenous language	50%	43%	52%	53%	54%	55%
Q14 : In your opinion, who has primary responsibility for ensuring the bridge between Indigenous Peoples and non-Indigenous Canadians?	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents (n=1305) – % all choices</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
PUBLIC AUTHORITIES	80%	77%	82%	81%	76%	80%
Government of Canada	71%	69%	70%	77%	67%	70%
Government of my province	58%	55%	65%	62%	48%	58%
INDIGENOUS COMMUNITIES AND ORGANIZATIONS	74%	78%	71%	72%	76%	69%
INDIVIDUAL RESPONSABILITY	65%	66%	63%	60%	74%	65%
Non-Indigenous Canadians, individually	47%	43%	47%	45%	58%	46%
Indigenous Canadians, individually	43%	50%	38%	36%	49%	48%

ANNEX 1 : RESULTS BY PROVINCE

Q15A : In general, how well do you feel you know the Indigenous tourism and cultural offering in your province ?	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
Strong knowledge	5%	6%	2%	4%	9%	4%
Average knowledge	33%	40%	25%	30%	38%	32%
Poor knowledge	40%	39%	42%	42%	35%	45%
No knowledge	22%	15%	31%	25%	18%	19%

Q15B : In general, how well do you feel you know the Indigenous tourism and cultural offering in the rest of Canada?	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
Strong knowledge	2%	2%	1%	3%	3%	2%
Average knowledge	23%	27%	19%	18%	30%	26%
Poor knowledge	46%	48%	44%	48%	41%	53%
No knowledge	29%	23%	36%	32%	26%	20%

ANNEX 1 : RESULTS BY PROVINCE

Q16 : For each of the following pairs, which of the two statements best corresponds to your perception of the Indigenous cultural and tourism offering in **your province?**

	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents – % selected</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
Indigenous tourism and cultural experiences are generally authentic	77%	72%	81%	78%	79%	73%
Indigenous tourism and cultural experiences are generally artificial	23%	28%	19%	22%	21%	27%
The Indigenous tourism and cultural offering is traditional	74%	70%	79%	74%	74%	75%
The Indigenous tourism and cultural offering is modern	26%	30%	21%	26%	26%	25%
Indigenous tourism and cultural products are generally affordable	70%	67%	67%	78%	64%	76%
Indigenous tourism and cultural products are generally expensive	30%	33%	33%	22%	36%	24%
Indigenous cultural and tourist attractions are accessible (nearby)	63%	61%	63%	65%	59%	67%
Indigenous cultural and tourist attractions are inaccessible (far away)	37%	39%	37%	35%	41%	33%
Indigenous tourism and cultural experiences are generally diverse	58%	49%	61%	63%	57%	68%
Indigenous tourism and cultural experiences are generally all the same	42%	51%	39%	37%	43%	32%

ANNEX 1 : RESULTS BY PROVINCE

QNEW2 : What is your level of agreement with the following statements?	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents – Average on ten</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
Indigenous experiences should be owned and operated by indigenous individuals or communities.	8.0	7.5	8.2	8.3	8.0	7.8
Indigenous experiences are too be led by indigenous people, not government owned agency.	7.7	7.3	8.1	7.8	7.9	7.5
Visiting an indigenous attraction that is not owned and managed by an Indigenous community or owner takes away the authenticity.	7.4	6.8	7.7	7.6	7.5	6.9
If it's not Indigenous owned and operated, I don't feel it's an Indigenous experience.	7.2	6.8	7.4	7.4	7.4	6.8
Indigenous cultural and tourist attractions should be considered as a path to reconciliation with Indigenous peoples in Canada.	7.0	6.7	7.3	7.0	7.2	6.9
The Government of Canada should invest more in Indigenous tourist and cultural infrastructures.	6.5	6.0	6.8	6.6	7.0	6.1
The Government of my province should invest more in Indigenous tourist and cultural infrastructure.	6.4	6.0	6.8	6.5	6.7	6.2
For me personally, an Indigenous cultural/tourist experience is attractive : knowing a leisure trip is based around Indigenous culture would prompt me to book it.	6.2	5.8	6.5	6.0	6.8	6.3
The ownership of an Indigenous experience doesn't matter to me, as long as I have a good time.	5.0	5.2	5.0	4.6	4.9	5.2

ANNEX 1 : RESULTS BY PROVINCE

Q17 : Have you ever taken part in an Indigenous cultural and tourism activity in **your province?**

	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
PARTICIPATED IN AT LEAST ONE INDIGENOUS ACTIVITY	58%	71%	48%	58%	51%	47%
Visiting a museum, interpretation centre or traditional Indigenous site	31%	43%	19%	32%	32%	11%
Visiting an Indigenous craft/art boutique or exhibition	29%	32%	26%	29%	29%	19%
Visiting an Indigenous community	24%	24%	20%	23%	33%	24%
Attending an Indigenous Pow Wow, festival, event, or performance	24%	36%	21%	22%	10%	18%
Other Indigenous activity(ies) (artwork, traditional ritual, stories and legends, etc.)	14%	18%	12%	15%	10%	9%
Connecting with Indigenous Elders	13%	21%	14%	9%	8%	3%
Indigenous adventure or nature tour (kayak, snowmobile, helicopter, etc.)	7%	10%	5%	5%	5%	7%
Stay in Indigenous accommodation (camping, hotel, inn, non-traditional accommodation, etc.)	6%	11%	6%	3%	6%	2%
Hunting and fishing activity with an Indigenous outfitter	4%	7%	2%	2%	3%	3%
No, I've never taken part in an Indigenous cultural and tourism activity	42%	29%	52%	42%	49%	53%

ANNEX 1 : RESULTS BY PROVINCE

Q18 : And among these activities in **your province**, which ones did you participate in over the past three years?

	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
PARTICIPATED IN AT LEAST ONE INDIGENOUS ACTIVITY IN THE PAST 3 YEAR	37%	45%	31%	33%	40%	32%
I have not done any of these activities in your province in the last three years	21%	25%	17%	25%	11%	16%
Visiting an Indigenous craft/art boutique or exhibition	14%	16%	11%	13%	17%	8%
Visiting a museum, interpretation centre or traditional Indigenous site	14%	20%	9%	13%	15%	4%
Visiting an Indigenous community	12%	10%	9%	11%	20%	12%
Attending an Indigenous Pow Wow, festival, event, or performance	10%	15%	13%	7%	6%	6%
Connecting with Indigenous Elders	7%	11%	8%	4%	3%	3%
Other Indigenous activity(ies) (artwork, traditional ritual, stories and legends, etc.)	5%	6%	6%	6%	3%	3%
Stay in Indigenous accommodation (camping, hotel, inn, non-traditional accommodation, etc.)	3%	5%	2%	1%	4%	2%
Hunting and fishing activity with an Indigenous outfitter	2%	4%	1%	0%	2%	0%
Indigenous adventure or nature tour (kayak, snowmobile, helicopter, etc.)	2%	3%	3%	2%	2%	4%

ANNEX 1 : RESULTS BY PROVINCE

Q19 : Have you ever taken part in an Indigenous tourism and cultural activity outside of **your province** or within the scope of a trip?

Base : All respondents

	Total	SK	NB	NS	NL	PEI
	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
PARTICIPATED IN AT LEAST ONE INDIGENOUS ACTIVITY OUTSIDE OF THEIR PROVINCE	28%	38%	21%	22%	28%	28%
Yes, in another Canadian province	21%	29%	17%	17%	24%	14%
Yes, in the south (Mexico, Cuba, Dominican Republic, Chile, Peru, etc.)	5%	8%	4%	3%	4%	5%
Yes, in the United States	4%	9%	2%	3%	2%	7%
Yes, elsewhere in the world (Nepal, Mongolia, Norway, etc.)	2%	2%	3%	2%	3%	3%
Yes, in New Zealand or Australia	2%	4%	1%	3%	0%	6%
No, I have never taken part in an Indigenous tourist and cultural activity outside of my province	68%	58%	76%	72%	66%	67%
I'm not sure	5%	4%	3%	6%	5%	5%

ANNEX 1 : RESULTS BY PROVINCE

Q19X	Total	SK	NB	NS	NL	PEI
<i>Base : All respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
Practiced an Indigenous activity in province of residence and elsewhere	24%	36%	15%	18%	24%	20%
Practiced an Indigenous activity in province of residence only	34%	35%	32%	40%	27%	27%
Practiced an Indigenous activity outside of province of residence only	4%	2%	6%	4%	4%	7%
Never took part in an Indigenous activity	38%	27%	46%	37%	45%	45%

ANNEX 1 : RESULTS BY PROVINCE

Q20 : What is your level of interest in the following Indigenous cultural and tourism activities in your province?	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents – % interested</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
Visiting an Indigenous boutique or art/craft exhibition	75%	69%	74%	76%	84%	76%
Visiting a museum, interpretation centre or traditional Indigenous site	74%	71%	74%	76%	78%	73%
Other Indigenous activity(ies)	70%	66%	71%	71%	79%	62%
Attending an Indigenous Pow Wow, festival, event, or performance	66%	62%	69%	65%	73%	60%
Visiting an Indigenous community	65%	53%	69%	70%	74%	66%
Connecting with Indigenous Elders	57%	52%	60%	55%	66%	54%
Stay in Indigenous accommodation	56%	55%	58%	54%	63%	47%
Indigenous adventure or excursion in nature	52%	50%	55%	51%	55%	52%
Hunting and fishing activity with an Indigenous outfitter	38%	42%	39%	31%	41%	37%

ANNEX 1 : RESULTS BY PROVINCE

Q23 : Which of the following would you value most as part of an Indigenous tourism and cultural experience?	Total	SK	NB	NS	NL	PEI
Base : all respondents – multiple mentions	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
Value for money	31%	34%	27%	30%	34%	37%
The opportunity to learn more about history and heritage	30%	26%	31%	31%	32%	32%
Beauty of the landscape, the destination	25%	21%	23%	27%	29%	32%
Option of doing something new, an experience you have never had before	21%	17%	21%	27%	20%	21%
Ease of getting there (proximity/accessibility)	16%	17%	14%	16%	18%	19%
The socio-cultural activities offered (festivals, shows, etc.)	16%	16%	16%	15%	19%	12%
The possibility of combining outdoor, cultural and educational activities during the same stay	15%	13%	17%	17%	14%	15%
The cleanliness of the area	15%	17%	12%	14%	16%	16%
Safety of visitors	15%	18%	14%	10%	19%	15%
Option of interacting directly with members of the Indigenous community	13%	12%	16%	15%	10%	10%
Outdoor activities offered	12%	11%	13%	14%	10%	11%
The gastronomy, the good food	11%	10%	12%	10%	9%	12%
Accommodation on offer	10%	9%	10%	8%	14%	8%
The range of family activities	9%	11%	9%	8%	8%	3%
The offering of activities for adults without children (couples and friends)	8%	7%	7%	12%	7%	5%
Offer a turnkey package (including accommodation, transport, food, etc.)	8%	8%	10%	6%	6%	6%
Option to speak your own language	7%	6%	9%	8%	6%	3%
Weather/climate (no extreme conditions)	9%	12%	9%	9%	6%	9%

ANNEX 1 : RESULTS BY PROVINCE

Q25 : Let's say you have to travel to visit an Indigenous tourist attraction. What would be the maximum time you would be willing to travel to your destination for a day trip (without an overnight stay), starting from your place of residence ?

	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
30 minutes or less	9%	16%	4%	7%	5%	9%
More than 30 minutes, but less than an hour	15%	16%	16%	16%	12%	19%
More than an hour, but less than two	39%	35%	43%	42%	38%	36%
More than two hours, but less than three	26%	24%	25%	26%	27%	27%
More than three hours, but less than four	7%	6%	8%	5%	11%	3%
More than four hours, but less than five	2%	2%	2%	1%	1%	1%
More than five hours	3%	2%	2%	3%	6%	4%
<i>Average (minutes)</i>	109.7	109.5	112.5	107.9	127.1	107.1

Q25 : Let's say you have to travel to visit an Indigenous tourist attraction. What would be the maximum time you would be willing to travel to your destination for a short stay (1 or 2 nights (weekend))

	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents</i>	(n=1305)	(n=504)	(n=301)	(n=300)	(n=100)	(n=100)
30 minutes or less	6%	10%	3%	6%	1%	6%
More than 30 minutes, but less than an hour	7%	8%	5%	8%	8%	8%
More than an hour, but less than two	17%	18%	22%	11%	21%	18%
More than two hours, but less than three	31%	33%	33%	33%	19%	25%
More than three hours, but less than four	23%	17%	19%	28%	30%	27%
More than four hours, but less than five	8%	8%	10%	6%	6%	10%
More than five hours	8%	6%	8%	7%	15%	6%
<i>Average (minutes)</i>	162.0	146.6	165.6	164.3	181.9	161.8

ANNEX 1 : RESULTS BY PROVINCE

Q25 : Let's say you have to travel to visit an Indigenous tourist attraction. What would be the maximum time you would be willing to travel to your destination for a stay of at least three nights, starting from your place of residence?

	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
30 minutes or less	6%	11%	4%	6%	1%	6%
More than 30 minutes, but less than an hour	3%	2%	3%	5%	2%	3%
More than an hour, but less than two	13%	14%	17%	9%	12%	13%
More than two hours, but less than three	19%	20%	21%	18%	20%	17%
More than three hours, but less than four	22%	21%	20%	25%	21%	24%
More than four hours, but less than five	16%	16%	13%	18%	14%	15%
More than five hours	21%	16%	22%	20%	30%	21%
<i>Average (minutes)</i>	200.0	184.3	199.9	203.6	224.0	199.9

ANNEX 1 : RESULTS BY PROVINCE

Q22 : If you were to plan an Indigenous tourism and cultural trip/activity, what main sources of information you would use to find out about attractions and get information?

	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
USES AT LEAST ONE SOURCE	89%	86%	91%	90%	92%	86%
Internet searches (websites, search engines, blogs, etc.)	55%	50%	56%	61%	55%	41%
Local / Provincial Indigenous Tourism website	45%	37%	51%	45%	52%	44%
Destination Indigenous national tourism website	34%	31%	39%	39%	28%	24%
Family/friends/colleagues	32%	31%	33%	31%	32%	32%
Tourist information offices	28%	22%	28%	28%	37%	24%
Tourist pamphlets/brochures	28%	27%	28%	30%	30%	28%
Social networks (Facebook, Instagram, Pinterest, etc.)	26%	23%	32%	26%	23%	24%
Tour/travel guides	21%	21%	22%	17%	23%	23%
Online travel agency (Airbnb, Expedia, Trip Advisor, etc.)	13%	14%	13%	12%	14%	9%
Social Video Channels (YouTube, TikTok, etc.)	12%	12%	14%	11%	12%	11%
Travel agent / agency	11%	10%	9%	11%	13%	13%
Daily newspapers/magazines	7%	6%	8%	10%	3%	11%
Programs and web TV on travel	7%	6%	10%	6%	5%	12%
Other resource(s)	1%	1%	0%	2%	1%	3%
I'm already familiar with the places I visit	3%	3%	3%	2%	4%	2%
I don't know/I prefer not to answer	8%	11%	6%	8%	3%	12%

ANNEX 1 : RESULTS BY PROVINCE

QNEW3 : And what kind of information would you be looking for?	Total	SK	NB	NS	NL	PEI
<i>Base : all respondents – multiple mentions</i>	<i>(n=1305)</i>	<i>(n=504)</i>	<i>(n=301)</i>	<i>(n=300)</i>	<i>(n=100)</i>	<i>(n=100)</i>
“Must See” activities and attractions of the destination	48%	44%	52%	52%	48%	30%
Events and festivals at destination	45%	37%	50%	48%	44%	43%
Calendar of upcoming activities	44%	41%	48%	47%	43%	32%
Accommodation suggestions	39%	35%	38%	41%	47%	23%
Packages and promotional offers	38%	36%	40%	39%	39%	29%
Photos and videos of the destination	37%	35%	42%	38%	31%	42%
Practical information (how to get there, weather, etc.)	37%	40%	38%	41%	28%	27%
Information about the locals, their lifestyle and traditions	36%	30%	41%	38%	35%	34%
Attractions and activities off the beaten track (well-kept secrets)	34%	28%	41%	33%	33%	32%
Restaurant recommendations	33%	28%	31%	43%	27%	26%
Destination reviews from other travelers	31%	30%	30%	36%	29%	25%
Itinerary and route suggestions	31%	31%	27%	37%	29%	23%
General portrait of the destination (history, description of the districts, etc.)	30%	30%	34%	28%	27%	28%
Advice from other travelers about the destination	29%	29%	30%	28%	33%	12%
Maps	28%	27%	28%	32%	23%	19%
Tourist guide of the destination	27%	25%	28%	30%	26%	30%
Other information	0%	0%	0%	0%	0%	0%
None in particular	1%	2%	0%	2%	0%	3%
I don't know	1%	1%	0%	1%	0%	0%

ANNEX 2 : SEGMENTATION METHODOLOGY

<p>GENERAL DESCRIPTION</p>	<p>using a certain number of variables, the purpose of the segmentation analysis is to create groups of homogeneous individuals (clusters). More specifically, the objective is to combine subjects into interpretable groups in such a way that the individuals of the same group are as similar as possible to each other according to certain characteristics and as different as possible from other groups according to these same characteristics.</p> <p>To achieve the objectives of this study, the cluster analysis was conducted using a latent class method, which is a technique that is more flexible and more robust to outliers than the traditional K-means approach (cluster analysis). The latent class method allows the use of non-numeric variables (for example, categorical, binary or ordinal variables). The method is based on a probability model, where each individual is grouped according to the similarity of their perceptions. The classification algorithm calculates the probability of belonging to a class for each of the individuals and assigns the segment with the highest probability.</p>
<p>SEGMENTATION</p>	<p>Following the analysis, 6 segments were identified, each representing a type of persona. To help understand the different profiles, each segment is presented via a descriptive and infographic sheet.</p>
<p>VARIABLES</p>	<p>After many iterations, the following variables were selected:</p> <p>Q13 : What would be your interest in learning more about...?</p> <ul style="list-style-type: none"> ○ (A) the issues and realities of Indigenous Peoples today, (B) the history of Indigenous Peoples, (C) the traditions and heritage of Indigenous Peoples, (D) the Indigenous cultural and artistic environment and (E) Indigenous languages • QNEW2 : On a scale of 1 to 10, 1 means “strongly disagree” and 10 means “strongly agree”. • Q20 : What is your level of interest in the following Indigenous cultural and tourism activities in your province. <ul style="list-style-type: none"> ○ (A) Visiting an Indigenous boutique or art/craft exhibition, (B) Visiting a museum, interpretation center or traditional Indigenous site, (C) Attending an Indigenous Pow Wow, festival, event, or performance, (D) Hunting and fishing activity with an Indigenous outfitter, (E) Stay in Indigenous accommodation, (F) Indigenous adventure or excursions in nature, (G) Connecting with Indigenous Elders, (E) Visiting an Indigenous community and (F) Other Indigenous activity(ies). • Q21 : What are, or would be, your main obstacles to participating in an Indigenous activity?

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