

The **UNTAPPED** **POTENTIAL** of **CANADIAN** **INDIGENOUS** **TOURISM**



INDIGENOUS
TOURISM ASSOCIATION OF CANADA

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PRESENTATION





Background and Purpose

To understand Canadian travellers' awareness, engagement, and support for Canadian Indigenous tourism offerings, willingness to pay for the ITDF, and reactions to "The Original Original" accreditation program and branding initiative

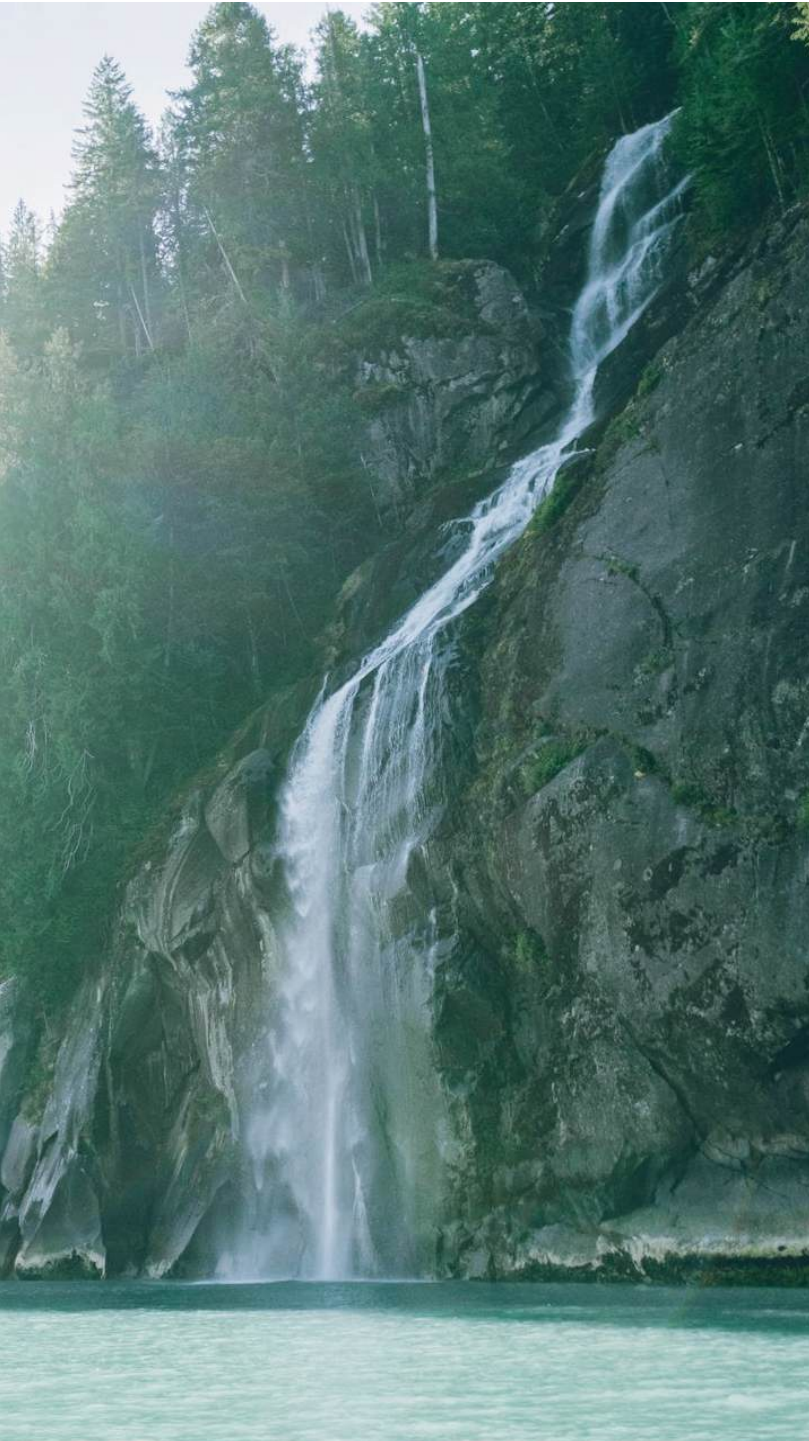
Methodology

Nationally representative gen pop survey of **n=1006** Canadian travellers (70% incidence)

- 46% male, 53% female
- 18-34 (22%), 35-54 (40%), 55-74 (39%)
- Alberta (10%), British Columbia (15%), Manitoba (4%), New Brunswick (2%), Newfoundland & Labrador (1%), Nova Scotia (2%), Ontario (42%), PEI (0.4%), Quebec (19%), Saskatchewan (4%)

Travel trade interviews **n=6**

KEY INSIGHTS



1. There is incredible potential in Canadian Indigenous tourism as an economic asset
2. A significant majority of Canadian travellers are supportive of domestic Indigenous tourism and ITAC's initiatives
3. ITAC is uniquely positioned to leverage this support, and unlock the full potential of indigenous tourism through the ITDF and the Original Original program



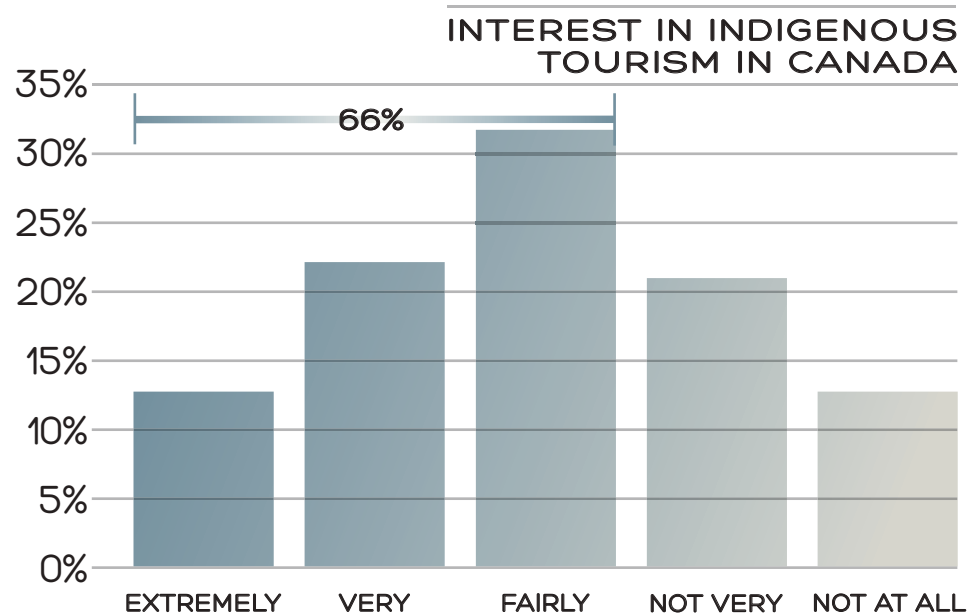
INTEREST *in* INDIGENOUS TOURISM *in* CANADA



High interest in domestic
Indigenous tourism
among Canadian
travellers

Size of market - 66% of
Canadian travellers are
interested in domestic
Indigenous travel

HUGE potential market

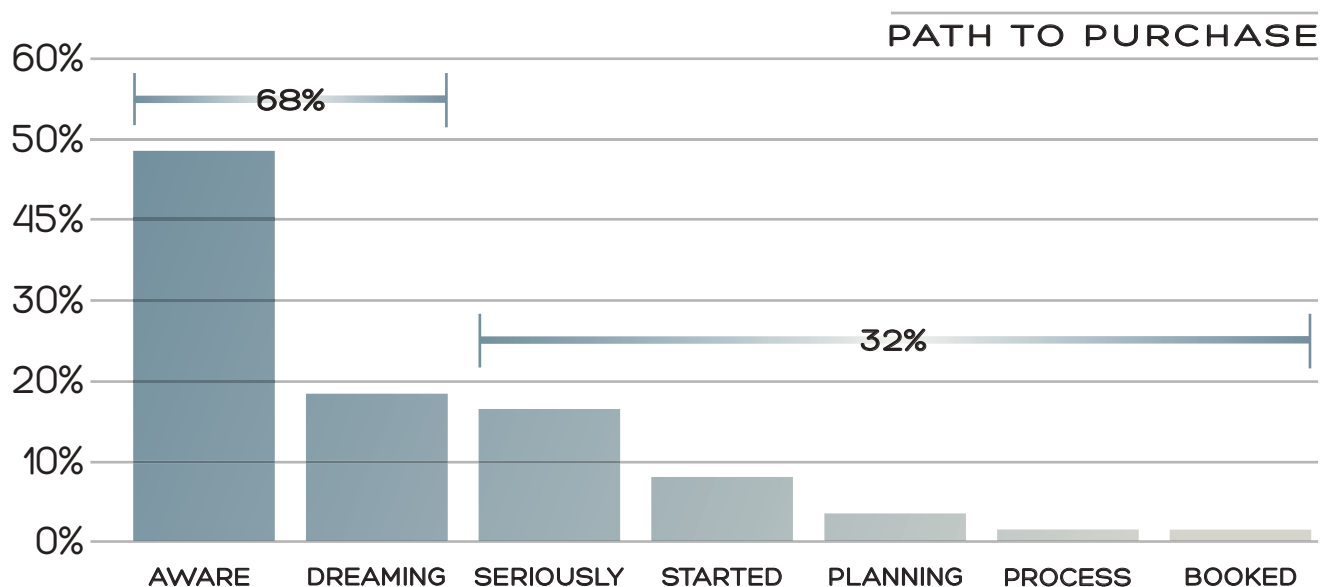


PATH *to* PURCHASE



1/3 (32%) of interested* travellers are already seriously considering a trip which includes an Indigenous experiences in Canada

On the other hand, there is still a massive 2/3 (68%) who are positively predisposed*, that are still in the awareness and dreaming stage - this is low hanging fruit



*Q7 - EXTREMELY, VERY, or FAIRLY appealing when asked about the opportunity to participate in Indigenous tourism activities as part of their trip in Canada

INDIGENOUS TOURISM DESTINATION FUND SUPPORT



The majority, **69%** of Canadian travellers support the ITDF

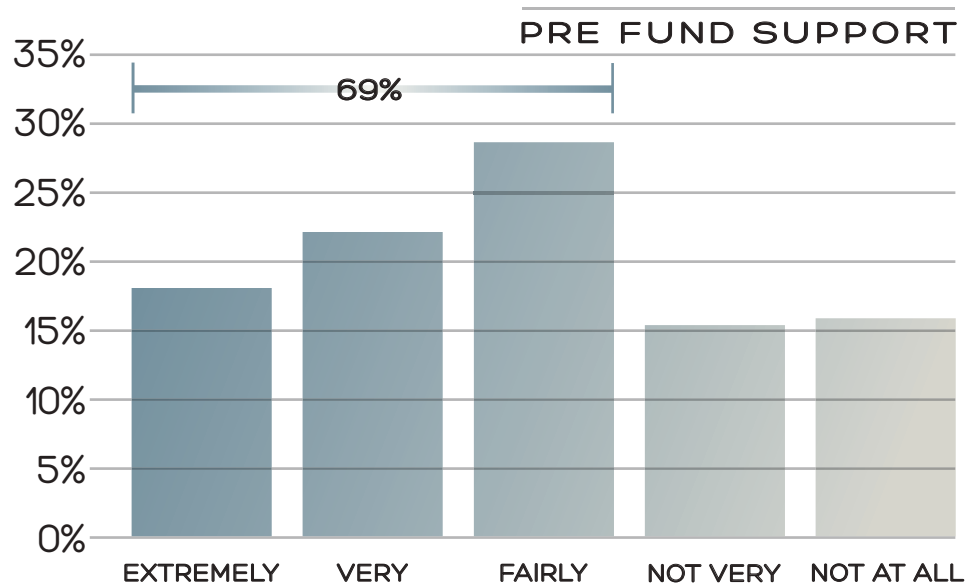
Crucially, even among those who are not interested* in Indigenous travel, **38%** still support the ITDF

CONCEPT

The Indigenous Tourism Association of Canada (ITAC) has created the Indigenous Tourism Destination Fund (ITDF) to allow businesses and travellers to take real action towards supporting reconciliation through the development of Indigenous tourism in Canada

Partner businesses would add a **25-cent (25¢)** fee per transaction on things like hotel accommodations, tours, and park visits, representing a tiny fraction of the total bill. The funds are collected and distributed through ITAC's network of partners

These funds will be used to invest in enhancing Canadian Indigenous tourism offerings, infrastructure & destination development, building a sustainable workforce, and business development & promotion



*Q7 - NOT VERY, NOT AT ALL appealing when asked about the opportunity to participate in Indigenous tourism activities as part of their trip in Canada

ITDF

OPEN END

ANALYSIS



Main drivers for the ITDF

- “ 25 cents is a very small amount
- “ Big gain for very little investment

Main barriers for the ITDF

- “ Indigenous Communities are already getting too much money
- “ Not enough to make a difference, or to pay for the administration



INDIGENOUS EXPERIENCES APPEAL



Immersive and involving experiences are of particular interest as indicated by the top two box scores (Extremely + Very)

Attractions: 48%



Food & Beverage: 48%



Accommodations: 46%



Outdoors & Adventures: 42%



Events & Performances: 40%



Cultural Tours: 39%



Retail: 34%



POST EXPOSURE INTEREST *in* DOMESTIC INDIGENOUS TOURISM

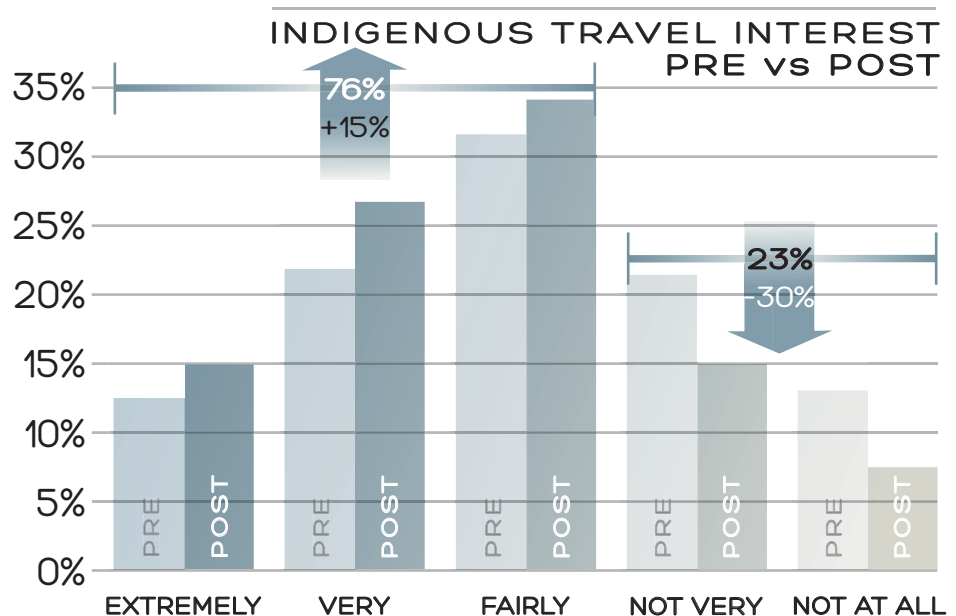


After exposure to the concepts, Canadian travellers' interest substantially increased by 15%, up to 76% and disinterest decreased by 30% to 23%



There is an underestimation of what's available. The concepts manage to take the haze off this tourism category, turning it from shades of gray to colour

This demonstrates solid potential for the appropriate marketing communications and spend to raise knowledge levels and thus demand

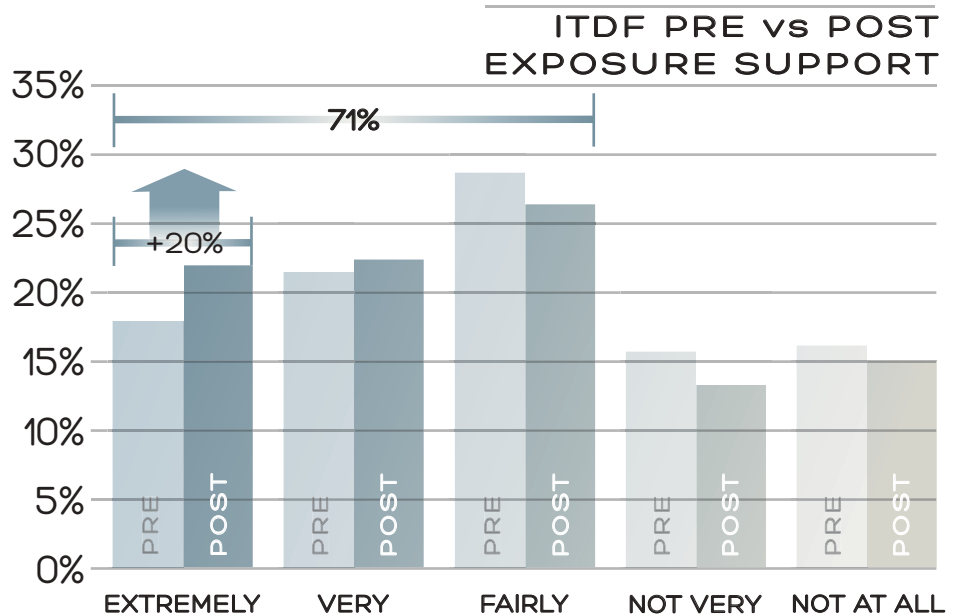


ITDF POST CONCEPT EXPOSURE INCREASE

After exposure to the concepts, travellers' overall support remained strong at **71%**

"Extremely supportive" jumped **20%**, indicating post concept exposure enthusiasm

Noteworthy, there is a shift from "Fairly" to "Extremely"/"Very"



ITDF POST EXPOSURE OPEN END ANALYSIS



Main drivers behind the positive shift in the ITDF support

- “ It seems like Indigenous based tourism is wider in scope that I thought, and that there is much more to be exposed to and learn about
- “ Because after reading the additional attractions available, my interest has been enhanced
- “ The previous information made indigenous tourism more appealing, there were some ideas that I found very relevant

With greater product knowledge, travellers on the fence rationalized greater support



ORIGINAL ORIGINAL



THE ORIGINAL ORIGINAL



Overall, **75%** of travellers find The Original Original Program useful for travel planning

High potential program to move consumers along the path to purchase

Positive feedback loop emerges, more wealth injected into existing programs, which in turn feeds the fund



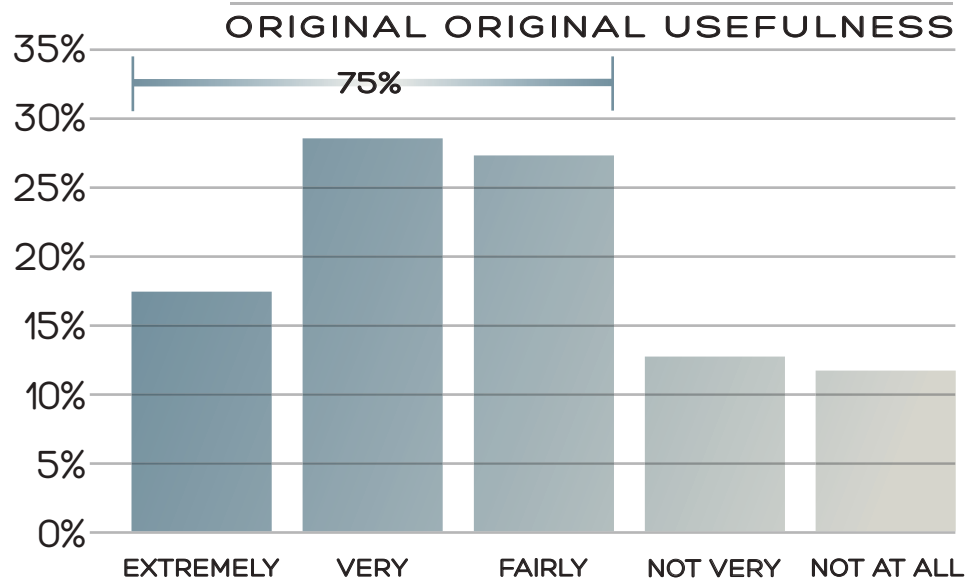
CONCEPT

The Indigenous Tourism Association of Canada has implemented the "Original Original" Accreditation Program

The purpose of the program is to assure visitors of the highest quality Indigenous tourism experience through a recognizable logo/brand

This logo/brand is displayed only by Indigenous owned and operated businesses that have been certified as offering truly authentic experiences to the highest standard within the tourism industry

When planning your next trip, look for the Original Original logo/brand

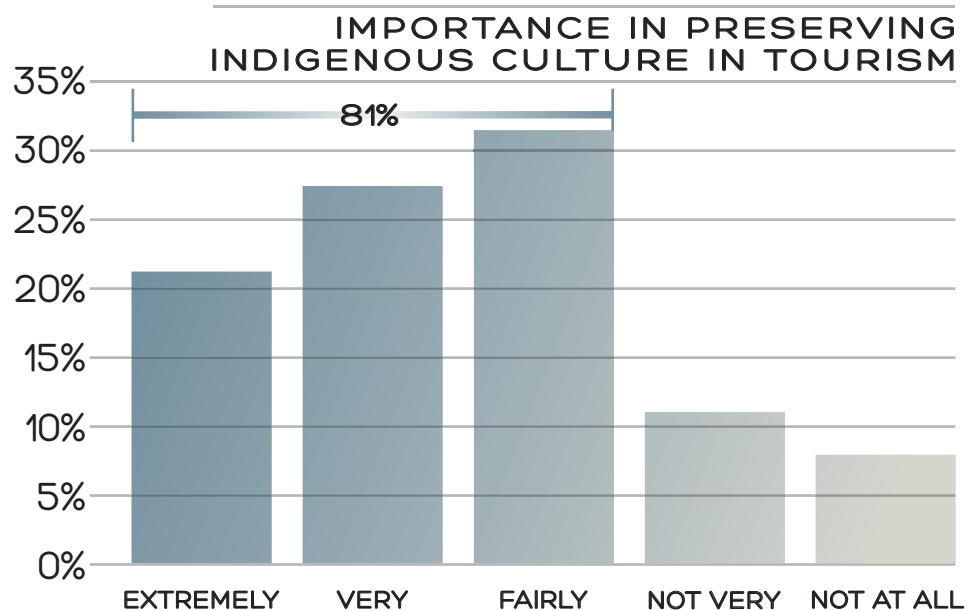


IMPORTANCE *in* PRESERVING INDIGENOUS CULTURE *in* TOURISM



The vast majority, **81%** of travellers think that preserving Indigenous culture is important

This is incredibly valuable as it is a pushback point from the Indigenous leaders and community members against the development of Indigenous tourism



MARKET SIZING POTENTIAL



For travellers on their next leisure trip within Canada, **63%** of them plan on including an Indigenous component

They reportedly are willing to spend **\$393** on average on the Indigenous portion of that trip

Scaled up to all travellers in Canada, the market size potential for those travellers' next trip could be between **2 billion and 4.8 billion dollars***, putting Indigenous tourism well on track to hit ITAC's 6 billion target by 2030



*~28 million Canadians 18-74, 70% are travellers (19.5 million), 63% plan on including an indigenous component (12.3 million), with an average of \$393 in spending, there is a total spend equal to 4.8 billion if interpreted as individual spending, or 2 billion if interpreted as household spending

TRAVEL TRADE INTERVIEWS- INDIGENOUS TRAVEL



Canadian Indigenous travel appeal

Indigenous experiences provide a unique, emotionally satisfying, and highly immersive experience

Travellers view Indigenous experiences as a more advanced tourism experience, often leading to self discovery

Canadian Indigenous travel barriers

Extent of Indigenous experiences not well known or understood by travellers, they can easily get *tourist trap anxiety*

Trade is highly concerned with market readiness, trade readiness, quality, handling various group sizes - there is a lack of infrastructure



Takeaway

The travel trade sees that there is tremendous opportunity in Indigenous tourism, however there is significant concern over industry readiness

TRAVEL TRADE INTERVIEWS- ITDF



Travel trade appeal of ITDF

They understand the potential of the ITDF to grow the Indigenous tourism industry, while preserving authenticity
Opportunity to support and give back to the Indigenous businesses and community - while getting credit for it

Travel trade barriers to ITDF

Perceived lack of transparency of fund distribution (fairness, specificity, impact)

Concerns of a lack of direct credit to the travel trade businesses that donate

Hesitancy in participating due to a lack of alignment and a sense of controversy and combativeness amongst ITAC partners



Takeaway

The travel trade understands the potential of the ITDF, but needs it to be transparent, direct, specific, and impactful

There also needs to be unification amongst ITAC partners regarding the fund

KEY FINDINGS & RECOMMENDATIONS



Overall, there is significant demand for Canadian Indigenous tourism, and there is incredible potential for it to grow as an economic asset

1. Travellers find The Original Original program highly useful and motivating to move them along in their trip planning

Recommendation: Continue to expand the Original Original program, centering the marketing around authenticity, making sure to also signal quality to address *Tourist Trap Anxiety* and doubts of market readiness

2. Travellers are highly supportive of the ITDF and it has the potential to grow much needed infrastructure and elevate more Indigenous businesses to “market ready” status

Recommendation: Move forward with recruiting for the fund and use this data as leverage politically. Also ensure that the fund is transparent, specific, and targeted

3. Travellers lack a clear vision of Indigenous tourism offerings needed to move forward in their trip planning process

Recommendation: Position ITAC as the hub for Canadian Indigenous tourism and their marketing communications, focusing on educating and reeducating consumers on the current extent and quality of offerings available to alleviate misconceptions



To learn more about ITDF visit:
ITDF.INDIGENOUSTOURISM.ca

And to learn more about The Original Original, visit:
THEORIGINALORIGINAL.ca



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