



**INDIGENOUS**  
TOURISM ASSOCIATION OF CANADA

ASSOCIATION TOURISTIQUE  
**AUTOCHTONE**  
DU CANADA

# COVID-19 Driven Interest Assessment of Canada's Domestic Market

FOR INDIGENOUS TOURISM & CULTURAL EXPERIENCES

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FINAL REPORT / OCTOBER 2020

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*Front Cover: Restaurant La Sagamité, QC  
Back Cover: Arctic Bay Adventures, NU*



# Background & Objective

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## BACKGROUND

The Indigenous Tourism Association of Canada (ITAC) has developed a three-phased strategic recovery plan to combat the impact of COVID-19 on all international tourism to Canada.

### **1: Response | 2: Recovery | 3: Resilience**

ITAC commissioned Insignia Marketing Research to conduct research to understand both the relevance and potential of Indigenous tourism and cultural experiences within the domestic travel market. This will greatly clarify and expedite the Recovery phase so that ITAC and Indigenous businesses can take immediate action to drive domestic demand.

## OBJECTIVE

To understand the COVID-19 domestic traveller's mindset, need-states and behaviours to drive interest and engagement in or including Indigenous tourism and cultural experiences in near future travel plans.

# Methodology

# Methodology

A total of 12 mini-groups (2 hours) were conducted online (webcam based) using itracks platform between August 10th and 17th, 2020.

The groups consist of 3 segments:



- Younger (age 24-45) with kids
  - » Total 5 groups



- Younger (age 24-45) without kids
  - » Total 3 groups

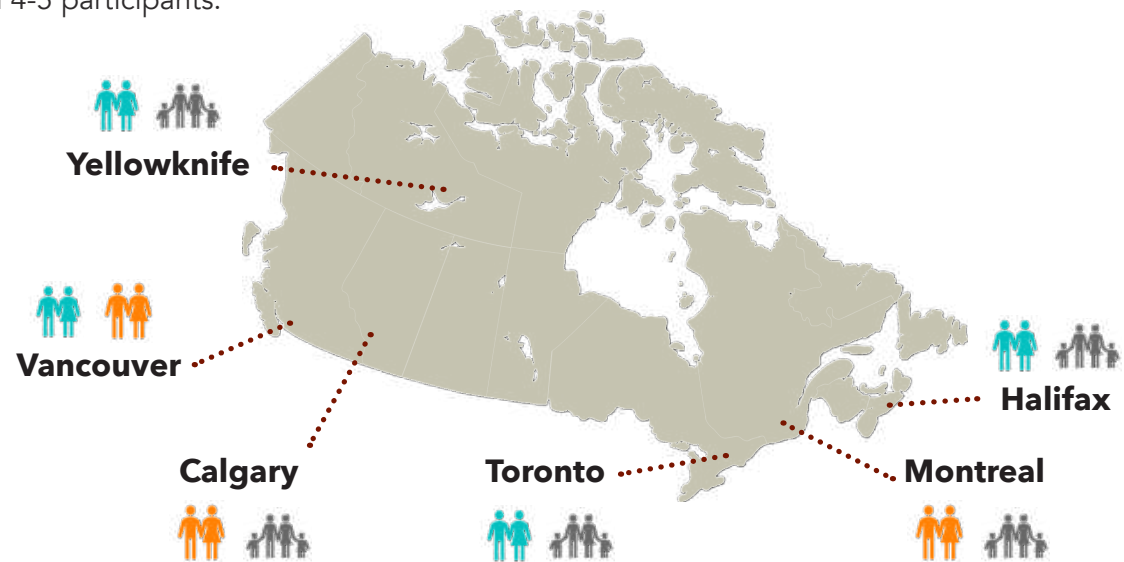


- Older (age 55-65) with or without kids
  - » Total 4 groups

Two groups per city, each group had 4-5 participants.

*NOTE: The findings herein should be regarded as tentative hypotheses about the marketplace rather than as proven facts. This is inherent in the nature of this and any other qualitative research conducted with a small number of individuals.*

*The groups were video recorded, and copies will be kept on file at Insignia Marketing Research Inc. until August, 2022.*



# Opportunity



# Opportunity

## TIMELY TRANSFORMATIONAL

- COVID-19 disruption has created **an unprecedented, industry-wide opportunity** for Indigenous tourism and cultural experiences.
- Shifts in attitudes precede shifts in behaviour, and **both have shifted fundamentally** to your advantage.
- The **attitudinal** shifts have moved **much closer to perceived core values** of Indigenous culture.
- **Travel-related behavioural** shifts include a major surge in **road trips taken within province**.
- These together have had a major effect on Canadians **travel need-states**.
- The ideal time is **now** to leverage these shifts by supporting and showcasing ITAC and its members. Attention and funding both federally and provincially can have a substantial impact on attracting meaningful awareness, interest and drive sales.

# Attitudes

## COVID-19 HAS CAUSED SHIFTS

- COVID-19 has been an **agent of change** in escalating the emotional and physical need for breaking the constraints of enclosure and monotony – redefining escapism.
- **Escapism is being redefined** away from hectic, stressed, overscheduled, exhausted to embracing a slower, more mindful pace of life with your loved ones, appreciating nature, simplicity, spirituality and soulfulness.
- There is a move from the **artificial world into the truly real world**.
- **“Fun”** is now much more about simplicity, authenticity and togetherness.
- Travellers believe that Indigenous experiences can top non-Indigenous ones. There is a growable belief of **“magically stimulating”** and **“refreshing” outcomes**.

# Behaviours

## COVID-19 HAS CAUSED SHIFTS

- People still want to travel, but **refocusing**:
  - » Exclusively intent on travelling **domestically**, primarily driving, to remain in control of their own environment.
  - » They are digging deeper and more actively searching for “hidden gems”, because road trips have gone from 2-3 days to become the main family vacation of **1-2 weeks**.
  - » **Extended time** facilitates discovering local experiences both along the journey and at overnight stops and final destination – this is seen as a major plus by travellers.
- This deeper search for the “hidden gems” has created the biggest opportunity right now for the hugely **untapped and underutilized** Indigenous tourism and cultural experiences to be introduced to Canadians.

A close-up photograph of a person's hands weaving a basket. The person is wearing a plaid shirt with a pattern of blue, red, and white. The hands are positioned to weave a light-colored wooden strip into a basket that already has a red and white patterned interior. The background is a solid dark color.

# Constraints & Barriers

# Constraints & Barriers

## PRE-PLANNING PHASE

- **Undefined:** People do not have a clear idea of what Indigenous tourism and cultural experiences are:
  - » Indigenous tourism has shallow connotations, is a relatively recent term that has not yet been fully defined. You do not own sufficient meaningful 'mindspace' to gain sufficient traction.
  - » Indigenous cultural experiences have baggage: People associate Indigenous experiences with learning and education—too classroom-like.
  - » Indigenous tourism and cultural experiences do not even surface as options or components.
- **Lack of visibility:** Travel planners do not see any advertising, promotions and communications for Indigenous tourism and cultural experiences.
- **ITAC's advertising is not enough: It positively resonates but, it cannot make up for the reality that there is a huge lack of awareness and understanding of Indigenous tourism and cultural experiences.**

# Constraints & Barriers

## PLANNING PHASE

- Very little word-of-mouth is articulated compared to other trip types e.g. RV-ing, camping, cycling, paddling.
- Indigenous tourism products do not emerge in online tourism searches.
- People don't know what words to use in online searches to discover local Indigenous tourism products.
- No perceived single online resource or destination to find information, even if triggered to search for Indigenous experiences.
- Using end destinations Destination Marketing Organisation and Provincial Marketing Organisation sites do not elicit Indigenous solutions.

# Constraints & Barriers

## ITINERARY-BUILDING PHASE

- **Skepticism:** People can be suspicious of the authenticity of Indigenous experiences and want to know first-hand what they are getting into before they book.
- **Hesitation:** People are not sure if they are welcome to enter an unknown reserve or partake in authentic Indigenous celebrations and venues.
- **Preconceptions:** The primary focus is avoidance of being sedentary or “caught” in a learning and educational venue and being primarily exposed to the commercial side of the business.

“*People can be suspicious of the authenticity of Indigenous experiences*”

# Path-to-Purchase

# Path-to-Purchase

## LIMITATIONS

**Narrow opportunity for impact:** Many destinations can intervene at all nine Path-to-Purchase steps. Local Indigenous products are only meaningfully relevant at the Experience stage – when travellers have already embarked on their vacation.

Aware	Low awareness of Indigenous experiences overall and poor understanding of what is available.
On Dream List	Iconic Indigenous destinations are on the dream list but these tend to be for long-haul trips.
Seriously Considering	Not seriously considered for short-haul domestic driving trips.
Creating a Vacation Movie	Difficult to create a movie around Indigenous beyond education and learning; the experience seems static.
Detailed Itinerary	Do not see “Indigenous” surface while pre-trip researching and planning itinerary.
Finalizing Arrangements	Do not see Indigenous experiences or ask about it while engaging with other venues.
Purchase	Not typically present while booking. If present, leave open until arrival and then will check it out.
Experience	Open to the experiences while optimizing their time on their vacation if it looks welcoming and enjoyable.
Advocate	Instagram, Facebook, communicate with friends and relatives.

**Intervention Point: For product, but could also be for increasing awareness and image building.**

# Considerations

# Considerations

## WHAT ITAC MUST DO SHORT & LONG TERM

1. Execute a COVID-19 specific **domestic travel strategy and executional plan**.
  - Target the Experience Path-to-Purchase stage. It is an immediately actionable intervention point, for immediate sales generation.
2. Generate new funds to recruit, consolidate and create a united front for Indigenous tourism and cultural experiences, engaging all members of the Canadian tourism industry.
  - This unified approach will open up the potential to access and leverage earlier stages along the Path-to-Purchase.
  - Indigenous tourism is strong internationally, with 1 in 3 visitors, participating. More funding could drive greater awareness, education and interest in Canada.

*“Indigenous tourism is strong internationally,  
with 1 in 3 visitors participating”*

# Considerations

## WHAT ITAC MUST DO SHORT TERM

1. **Be aggressive**, engage in and encourage a combination of grass roots and guerilla marketing.
  - Grass roots: work with members from the ground up helping to build their business in and around members trading area - specifically targeting the driving vacation traveller.
  - Guerilla marketing: attract attention by directly addressing specific COVID-19 travel needs.
2. **Invest in optimizing the digital experience** to ensure **all** offerings have prominent positioning when online vacation planning/searching is happening to translate to click-through/conversion/bookings/reservations.
3. **Bring Destination Marketing Organisations and Provincial Marketing Organisations more on side**: it is more timely than ever to elevate and promote local Indigenous tourism and cultural experiences, as they can drive trips, extend stays and encourage **spending more money** within local communities.
  - Minimum: put Indigenous on their website - keeping people engaged in your province will have excellent ROI potential.
4. Encourage and facilitate all parties to **cross promote**.

# Considerations

## WHAT ITAC MUST DO LONG TERM

1. Build meaningful awareness, image and relevance:
  - Create a consistent, unified consumer-facing brand identity to crystalize what Indigenous tourism and cultural experiences are and how travellers will benefit, i.e. create positioning using inputs below.

Most Distinguishing Attributes	<ul style="list-style-type: none"><li>• Active, engaging, interactive, fun, authentic/real, simple, self-paced.</li><li>* Magical experience.</li></ul>
Tangible Benefits to the User	<ul style="list-style-type: none"><li>• Refreshed, connected, escapism.</li></ul>
Emotional Benefits to the User: How does it make them feel?	<ul style="list-style-type: none"><li>• More mindful pace of life with your loved ones.</li><li>• More appreciative of nature, simplicity, spirituality and soulfulness.</li><li>• Inspired.</li><li>* Transformed / new perspectives.</li></ul>
Brand / Product Persona / Human Characteristics	<ul style="list-style-type: none"><li>• Soulful, deep, without losing sight of fun and humour.</li></ul>
Brand Idea / What's Driving your Position	<ul style="list-style-type: none"><li>• Magical escapism:<ul style="list-style-type: none"><li>» Disneyworld = leave the real world into an artificial one.</li><li>» Indigenous Experiences = leave the artificial world into the truly real one.</li></ul></li></ul>

# Considerations

2. Take **ownership** of defining “authentic” and “real” on your terms and what you want to be.
3. Increase real world **visibility**:
  - Digital campaigns are effective within the planning process, and can work very well for iconic, long-haul Indigenous destinations.
  - However, to grasp the new opportunities for spontaneous, local Indigenous experiences, greater top-of-mind awareness is required to work higher up in the Path-to-Purchase (Awareness/Consider stages). For example, outdoor in major cities.
4. Federally, there needs to be **more resources** place on leveraging the value of Indigenous tourism and cultural experiences as a viable domestic tourism business, relevant to today's needs.

*Grasp the new opportunities for spontaneous, local Indigenous Experiences*

# Considerations

## WHAT ITAC MUST DO SPECIFICALLY FOR ITS MEMBERS

1. Champion, socialize and **assist members in activating** the new COVID-19 strategic plan to more effectively drive travellers to their businesses.
2. Develop a step-by-step **tool kit** specifically designed for grass roots and guerilla tactics.
3. Develop and facilitate a **best-practices** approach to quickly create more visibility, stronger communication and better advocacy.

*Elevate and promote local Indigenous tourism and cultural experiences, as they can drive trips, extend stays and encourage spending more money within the local communities*

# Considerations

## WHAT ITAC MEMBERS MUST DO SHORT TERM

**Be aggressive:** Become **highly visible and alluring** to travellers by speaking to their COVID-19 need-states and be the hidden gem experience they are after.

1. Draw tourism traffic from your **local area**. From the highways, accommodations, restaurants, attractions, tourism information centres and residents.
2. Use the ITAC **tool kit** to create roadside signage, banners, local billboards featuring unexpected art, craft and sculpture installations that speak to the COVID-19 need-states.
3. **Eclipse** the many tourism business (accommodations, restaurants and destinations) that are already aligning themselves with nature. By moving quickly, Indigenous businesses can enhance similar products with a value-added Indigenous **magical experiential** benefit.
4. **Leverage** the different four seasons draws that many destinations cannot.

# Considerations

**Fine tune a stronger, more relevant business positioning:** Indigenous businesses fall into 5 main categories; each can be enhanced through adapting to COVID-19 reframing.

CATEGORIES	COVID-19 NEED-STATE ENHANCEMENT
Culture & History	<ul style="list-style-type: none"><li>• Focus on active involvement, interactivity and engagement elements of the experience. Highlight interactive storytelling or featured artists.</li></ul>
Adventure / Hunting & Fishing	<ul style="list-style-type: none"><li>• Focus on the Indigenous view and perspective that will be gained. An opportunity for reflection and transformation.</li></ul>
Arts & Crafts	<ul style="list-style-type: none"><li>• Focus on high engagement, interactivity and cultural sharing/ community.</li></ul>
Accommodations	<ul style="list-style-type: none"><li>• Focus on self reflection, wellbeing, soulfulness and community.</li></ul>
Culinary	<ul style="list-style-type: none"><li>• Focus on interaction and involvement, teaching, making, learning. Offer culinary safaris where food is cooked and served in the outdoors.</li></ul>

# Considerations

## Additional Business Generation Activities

1. Encourage local business community to **feature**:
  - New styles of tours customize for COVID-19 needs and wants.
  - Special meal on site, long-table pop-up dinners, outdoor/unique venue culinary experiences.
2. **Integrate** and have greater involvement with tourism centres by:
  - Having a member set up a display and answer questions.
  - Provide virtual brochures and maps, have an onscreen activities video.
3. Generate **local publicity** through speaking to local newspapers, giving them story ideas, radio station free giveaways.
4. Press for **recognition** on all local Destination Marketing Organisation and Provincial Marketing Organisation websites.
  - For Destination Marketing Organisations try to get on their home page.
  - For Provincial Marketing Organisations try to get on their provincial map.
5. **Elevate** presence by being more active on social media and geo-targeting.
  - Social posts on Facebook, Twitter, Instagram through pop-ups.
  - Yelp, Google Maps, Groupon offerings.
  - Pursue specialty maps and apps (hiking, paddling, hunting).
  - Make purchasing online easy, efficient and effective.

# Summary

## COVID-19 DRIVEN

Indigenous tourism experiences fit uniquely well with consumer needs arising out of the COVID-19 pandemic. Hence, there is a great opportunity to market the sector **now!**

However, the sector is not actively being considered by domestic travellers. The barriers run the gamut, and need to be addressed, but the opportunities are plentiful, immediate and potentially transformative.

The **solution** is to create an industry-wide strategy to drive the industry forward quickly while the opportunity is at its peak.

It will take a bringing together of all efforts, minds and all levels of government to ideate cohesive solutions.

***“The solution is to create an industry-wide strategy to drive the industry forward quickly while the opportunity is at its peak”***



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