



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

FOR INDIGENOUS TOURISM & CULTURAL EXPERIENCES

EXECUTIVE SUMMARY / OCTOBER 2020



INDIGENOUS
TOURISM ASSOCIATION OF CANADA

ASSOCIATION TOURISTIQUE
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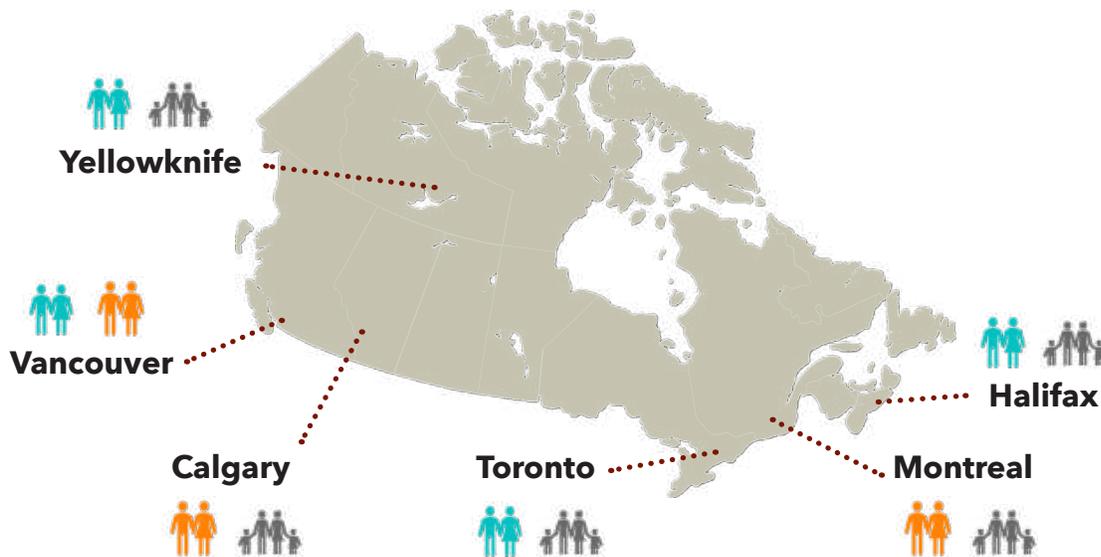
Foreword

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. 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.

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.

Opportunity

TIMELY TRANSFORMATIONAL

- COVID-19 disruption has created **an unprecedented, industry-wide opportunity** for Indigenous tourism and cultural experiences.
- Attitudes precede shifts in behaviour, and **both have shifted fundamentally** to your advantage.
- **Attitudinal** shifts have moved **much closer to perceived core values** of Indigenous culture. 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.
- **Travel-related behavioural** shifts include a major surge in **road trips taken within province**. Travellers are 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.
- 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.



“*Embrace a slower, more mindful pace of life with your loved ones*”

Voyageur Wilderness Program, ON

Constraints & Barriers

PRE-PLANNING & PLANNING PHASE

- **Undefined; lack of visibility:** Travel planners are unclear and do not see any advertising, promotions and communications for Indigenous tourism and cultural experiences.
- **Very little word-of-mouth:** Not articulated compared to other trip types e.g. RV-ing, camping, cycling, paddling.
- **Low online emergence in searches; lack of online vocabulary:** Too few words for online searches; No perceived single online resource or destination.
- **Not intergraded:** End destinations Destination Marketing Organisation and Provincial Marketing Organisation sites do not elicit Indigenous solutions.
- **Skepticism:** Suspicious of the authenticity; **Hesitation:** People are not sure if they are welcome; **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.
- **ITAC’s advertising is not enough:** Positively resonates, but it cannot make up for the reality that there is a huge lack of awareness and understanding.



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 optimising 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.

- Needed is a COVID-19 specific **domestic travel strategy and executional plan.**
- 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.

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 bottom up. Guerilla marketing: attract attention by directly addressing specific COVID-19 travel needs.
2. **Invest in optimising 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 the 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.**



NK/Mip Desert Cultural Centre, BC

WHAT ITAC MUST DO LONG TERM

1. Build meaningful awareness, image and relevance:
 - **Create a meaningful position** that is consistent, unified and has a consumer-facing brand identity to crystalize what Indigenous tourism and cultural experiences are.
 - » Magical escapism:
 - ▷ Disneyworld = leave the real world into an artificial one.
 - ▷ Indigenous experiences = leave the artificial world into the truly real one.
2. Take **ownership** of defining “authentic” and “real” on your terms and what you want.
3. Increase real world **visibility**:
 - Digital campaigns are effective within the planning process, and can work very well for iconic, long-haul Indigenous destinations.
 - » Grasp the new opportunities for spontaneous, local Indigenous experiences.
4. Federally, there needs to be **more resources** place on leveraging the value of Indigenous tourism and cultural experiences.

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.

Grasp the new opportunities for spontaneous, local Indigenous experiences

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.



Whitehorse Who What Where Tours, YT

WHAT ITAC MEMBERS MUST DO SHORT TERM

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

Additional business generation activities:

- Encourage local business community to **feature**:
 - New styles of tours customise for COVID-19 needs and wants.
 - Special meal on site, long-table pop-up dinners, outdoor/unique venue culinary experiences.
- 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.
- 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 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.



Kluskap Ridge RV & Campground, NS

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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