



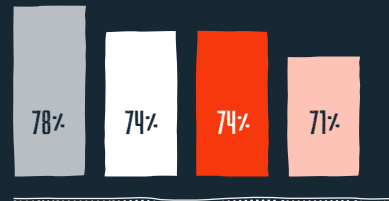
QUEBECERS STRONGLY SUPPORT INDIGENOUS TOURISM

A Leger survey conducted in January and February 2022 among 2002 people aged 18 and over who have traveled within Quebec in the past five years shows an unprecedented strong interest in Indigenous communities and tourism.

88% of Quebecers share a positive opinion of Indigenous communities

89% of Quebecers show an interest in taking part in at least one of the proposed Indigenous activities:

Quebecers are interested in:

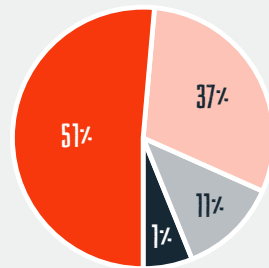


- History of Indigenous peoples
- Traditions and heritage of Indigenous peoples
- Ongoing issues and social context of Indigenous peoples
- Indigenous culture and arts

- Visiting a museum, an interpretation centre or a traditional site
- Visiting an Indigenous arts and crafts shop or exhibition
- Staying in an Indigenous accommodation
- Attending a Pow Wow, a festival, an Indigenous event or performance
- Adventure or excursion in nature
- Hunting and fishing
- Other Indigenous activities (art/craft creation, traditional ritual, stories and legends, etc.)

53% have never taken part in an Indigenous tourism and cultural activity in Quebec.

Despite the interest, lack of knowledge persists about the Indigenous tourism and cultural offer in Quebec



Obstacles to participation in Indigenous tourism and cultural activities among those interested

- ▶ 45% lack of knowledge about the offer
- ▶ 34% accessibility of the experiences
- ▶ 20% cost of taking part in the activities.

88% OF RESPONDENTS SAY THEY HAVE SCARCE OR NO KNOWLEDGE



BRIDGING THE GAP IS A SHARED RESPONSIBILITY

According to the survey respondents, bridging the gap between Indigenous peoples and non-Indigenous Quebecers is a shared responsibility, especially for governments (83%) and Indigenous communities and organizations (75%).

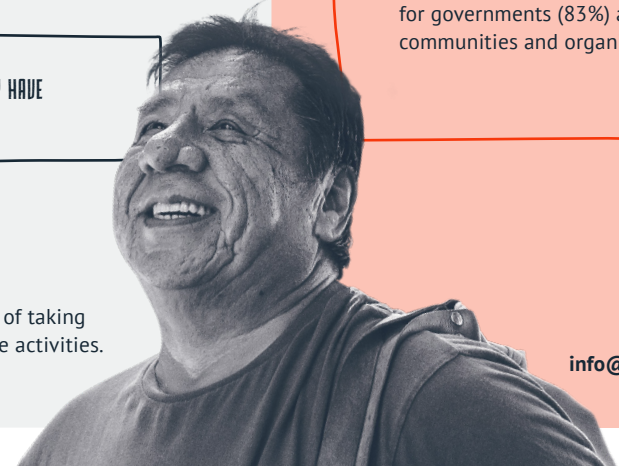


The survey findings confirm the appeal of Indigenous tourism and imply the key role that Indigenous Tourism Quebec (ITQ) must undertake toward developing the full potential of the tourism offer.

At the international level...

Visitors from France (63%) and Germany (47%) are most likely to be interested in Indigenous tourism experiences. Moreover, one in three international visitors to Canada are interested in Indigenous tourism experiences (37%).

Destination Canada, 2019 Market Snapshots



For more information:
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3 CUSTOMER SEGMENTS WITH HIGH TO VERY HIGH POTENTIAL

HEARTS WIDE OPEN



- ▶ Age: mostly 18-34 year olds (49%), but also in the 45-54 age group (23%)
- ▶ When they travel, they mainly do so as a couple (36%) or as a family (29%).
- ▶ They attach particular importance to the variety of cultural activities (29%), to the hospitality of local inhabitants (22%) and to the prestige of the destination (14%).

Significant interest in the following indigenous tourism experiences:

- ▶ Adventure in nature (99%)
- ▶ Staying in an Indigenous accommodation (96%)
- ▶ Museum, centre and traditional site (91%)

ADVENTURE SEEKERS



- ▶ Age: mostly 18-44 year olds (62% out of which 40% are 18-34 year olds)
- ▶ When they travel, they mainly do so as a couple (37%) or as a family (28%).
- ▶ They want a change of scenery by discovering a destination they have never visited before.

Significant interest in the following indigenous tourism experiences:

- ▶ Adventure in nature (100%)
- ▶ Museum, centre and traditional site (83%)
- ▶ Staying in an Indigenous accommodation (82%)

CULTURE ENTHUSIASTS



- ▶ Age: mostly 55+ years (57%)
- ▶ When they travel, they mainly do so as a couple (46%).
- ▶ They place greater emphasis on familiarity with the destination (33%), the historical and heritage aspects of a place (27%) and the variety of cultural activities available (25%).

Significant interest in the following indigenous tourism experiences:

- ▶ Arts/crafts shop or exhibition (98%)
- ▶ Museum, centre and traditional site (91%)
- ▶ Pow Wow, festival and event (75%)



3 OPTIMAL EXPERIENCES

IMMERSION IN NATURE

- ▶ Adventure in nature (with overnight stay in tourism accommodation)
- ▶ Duration of stay: one or two nights
- ▶ Travelling as a couple
- ▶ With possibility of guided tour AND interaction with Indigenous communities

ACCESS TO HISTORY AND CULTURE

- ▶ Visiting a museum, an interpretation centre, an Indigenous traditional site or an Indigenous arts and crafts shop or exhibition
- ▶ Day trip to an Indigenous community
- ▶ Travelling as a couple
- ▶ With possibility of guided tour AND interaction with indigenous communities

CELEBRATION OF TRADITIONS

- ▶ Participation in a Pow Wow, a festival or an Indigenous traditional event
- ▶ Short stay of one or two nights in an Indigenous community
- ▶ Travelling with friends
- ▶ With possibility of guided tour AND interaction with Indigenous communities