

ABORIGINAL RESEARCH RESULTS IN CANADA

Aboriginal Tourism Workshop
Inuvik, November 24, 2010

Outline

Literature
Review of
Aboriginal
Tourism
Research
done in
Canada

KEY
FINDINGS

- Aboriginal Tourism Definitions
- Potential Markets
- Demand – Needs and Wants
- Demand – Concerns
- Benefits of Aboriginal Tourism
- Industry – Strengths
- Industry – Concerns
- Industry – Challenges
- Recurring Results
- References

Aboriginal Tourism Definitions

- Aboriginal tourism product includes all tourism related businesses that offer an Aboriginal themed experience (PWC Consulting, 2002).
- Seeing or experiencing unique Aboriginal or native groups while on a trip (CTC, 2000).
- An authentic Aboriginal cultural tourism experience is majority Aboriginal owned or controlled, satisfies industry standards for market readiness and sector requirements, has high operating standards, and sufficient cultural content that is culturally appropriate and recognized by the originators of that culture while providing an opportunity for visitors to interact with Aboriginal people during the cultural tourism experience (ATBC, 2010).

Potential Market

- France, Germany and the UK substantial markets for Aboriginal tourism
- Canada and the US are weak in comparison to Australia in terms of promoting and supporting Aboriginal travel products, but this doesn't reduce interest.
- Aboriginal travel is not a driver to Canada – its a value-added product.

Potential Market

United Kingdom:

- 57% U.K. Aboriginal Culture travellers travelled for pleasure or vacation on their most recent trip - more likely to engage in VFR travel than German and French counterparts (27%).
- 38% have close friends or relatives living in Canada – YAY!
- Less likely to have used a package (37%) and took longer trips than German and French counterparts.

Potential Market

United Kingdom:

- On average 44 years of age, and are more likely to be male (57%) than female (43%).
- More likely to be married (54%) than single (27%), and about a fifth have children under 18 living at home (19%).
- Approximately one third have a college or university degree (32%), and 42% have household incomes of CDN\$52,000 or more.

Potential Market

Germany:

- German Aboriginal Culture Travellers travel for pleasure or vacation (70%).
- Highest total trip expenditures (CDN\$8,000) and their per person per day trip expenditures were almost double those for the U.K. and France (CDN\$120).
- Almost half used a package on their most recent trip (48%).

Potential Market

Germany:

- The average age is 43, and they are more likely to be female (53%), than male (47%).
- Just over 40% are married with about a fifth having children under 18 still living at home.
- They tend to be less educated than French and UK travellers (only 20% have a post-secondary degree).
- Very few have friends or relatives living in Canada (5%). Slightly lower interest in visiting Canada.

Potential Market

France:

- French Aboriginal Culture travellers were more likely to have visited Canada on their most recent trip (16%), Canada ranked 3rd among destinations visited.
- 71% travelled for pleasure. They are the most likely to prefer to travel with friends (22%).
- Just over half of French Aboriginal Culture travellers used a package on their most recent trip.

Potential Market

France:

- On average, 45 years of age.
- Compared to their U.K. and German counterparts, they are the most likely segment to have children under 18 living at home (25%).
- Most educated - 39% have college or university
- Higher annual household incomes - 52% have incomes of CDN\$47,000 or more
- Almost a fifth (18%) of these travellers have friends or relatives living in Canada – Good!

Market - BC

- Aboriginal Tourism in BC expected to grow to over \$50 million by 2012 (\$35 million today)
- 200 Aboriginal tourism businesses, half offer cultural tourism experiences
- Tourism operators are seeing growing demand for authentic cultural experiences, 89% would consider offering or expanding Aboriginal experiences as part of their packages.
- 36% of travellers had visited Aboriginal sites/attractions and events on previous trips to BC.

Market - BC

Travellers taking part in Aboriginal tourism in B.C. tend to be:

- Well-educated, upper middle-income wage earners, female baby boomers.
- Visiting from primarily North American and European destinations.
- Including Aboriginal tourism in their B.C. travels for the first time (65%).
- Taking part in Aboriginal tourism in places beyond B.C. (64%).
- Spending more money per trip than other tourists.

Market - BC

Compared to other B.C. travellers these Aboriginal tourists are more apt to:

- Spend more trip days in B.C. (average of 13 days).
- Include Aboriginal experiences on more of those trip days (average of 3 days).
- Visit more than one Aboriginal location on B.C. trip (average of 2.2 sites).
- Visit Aboriginal interpretive centres (24%), attractions (22%), museums (21%).
- Travel in larger parties (average of 3.6 persons).

Demand - Needs and Wants

- European Aboriginal Experience Seekers want:
 - ▣ Products that include participation
 - ▣ Products that provide enriching experiences
- European Aboriginal Experience Seekers do NOT want:
 - ▣ Product that are entertainment oriented
 - ▣ Products that distance the traveller from Aboriginal people

Demand - Needs and Wants

- Overall need for these travellers:
 - ▣ To have a sense of discovery and adventure
 - ▣ In Canada = authentic interaction with natives guiding them through Canada's beautiful and scenic nature
- Travellers are seeking self-discovery, they scrutinize products very closely for authenticity
 - ▣ They react negatively to artificial or overly staged activities, and fake crafts (made in China).
 - ▣ They are impressed with traditional clothing, even though they are aware that it is often only used for ceremonial occasions and special performances.
 - ▣ They are particularly impressed with experiential opportunities – traditional activities with Aboriginal people.

Authenticity - BC

Aboriginal Cultural Tourism Authenticity program in BC

Application:

- Tourism businesses apply by filling an application form, and
- Submitting to a secret shopper site inspection.

Criteria:

- Market-ready
- Operating standards
- Appropriate and respectful cultural content
- Visitor interaction with Aboriginal people
- Consistent commitment to excellence

Results:

5 certified tourism businesses during their first year (2009-10)

Demand - Needs and Wants

- Physical involvement:
 - ▣ Under 50 – more physical activities (canoeing, kayaking, dog-sledding, rafting, etc)
 - ▣ 50 and over (key group)– less physical activities (hiking, walks, nature observation and indoor activities)

Demand - Concerns

- Concerns for European market stem from previous bad experiences with Aboriginal travel:
 - ▣ Feeling unwanted
 - ▣ Feeling like a spectator
 - ▣ Feeling like their only role was to provide \$
- Authenticity concerns, fear that what they expect is outdated and all that is left are tourist traps

Benefits of Aboriginal Tourism

- Most tour operators agreed that the economic benefits of their site are secondary to the positive social benefits:
 - Preservation
 - Sharing
 - Healing and
 - Increased feelings of self-worth
- 86% felt the majority of the local community approves of the interpretation of the culture in the community for cultural tourism experiences
- Host communities often protect the more sacred elements of culture and community from visitation and interpretation

Industry - Strengths

- Knowledge that Aboriginal lifestyle is closely linked to nature, so Aboriginals could provide a unique perspective and value added to other Canadian tourism products.
- General Canadian strengths - safe, stable, nature close to metropolitan areas, etc.

Industry - Concerns

- Lack of top of mind awareness
- Sense that visitors may be unwanted by Aboriginals
 - ▣ Lack of advertisement
 - ▣ Negative history of Europeans with Aboriginals
- Authenticity concerns, fear that what they expect is outdated and all that is left are tourist traps

Industry - Challenges

Across Canada:

- Greatest challenges to reach the Canadian markets with their message:
 - Lack of funding
 - Lack of effective training resources
 - Lack of marketing support
 - Infrastructure barriers

Industry - Challenges

- Information, education and training constraints
- Capacity is lacking even at the Regional Aboriginal Tourism Association level
- Marketing constraints
 - ▣ Fragmented/weak marketing
 - ▣ Lack of marketing skills and resources
 - ▣ Limited understanding of market
 - ▣ Limited awareness of products by market
 - ▣ Lack of market ready products

Industry - Challenges

- Image and attitude constraints
 - ▣ Negative labour force attitudes
 - ▣ Negative image of Aboriginal peoples
 - ▣ Perceived negative quality and authenticity of products/facilities
 - ▣ Concern over cultural integrity
 - ▣ Inaccurate ideas: Aboriginal products must partner only with other Aboriginal product providers
- Funding constraints
 - ▣ Lack of available funding programs
- Limited awareness of potential funding sources

Industry – Challenges - Alberta

- Operation policies in parks
 - ▣ Restrictive use for guiding operators in national and provincial parks
- Signage
 - ▣ Lack of signage indicating attractions
 - ▣ Unwelcoming federal signage at reserve entrances
- Funding
 - ▣ Limited funding and access to capital
 - ▣ Limited awareness of funding sources
 - ▣ Limited knowledge of business plans needed to obtain funds
- Marketing and advertising
 - ▣ Lack of strong and coordinated marketing for Aboriginal tourism in Alberta
 - ▣ Need better provincial coordination and industry support

Industry – Challenges - Alberta

- Education and training of labour force
 - ▣ Lack of qualified people and Aboriginal-based tourism training
- Internal social issues
 - ▣ Band politics
 - ▣ Wellness issues
 - ▣ Limited understanding of economic benefits of tourism industry and demonstrate effect of promoting their culture
- Attitudes
 - ▣ Stigma attached to operating Aboriginal tourism business
- Bad relationships between Aboriginals and non Aboriginals

Recurring Results

- ❑ Aboriginal travel is not a driver to Canada – its a value-added product.
- ❑ European countries are a key market (UK, France, Germany)
- ❑ Awareness of Aboriginal Tourism in Canada is low, interest high
- ❑ Aboriginals perceived as closely linked to nature – strength
- ❑ Perceptions that Aboriginals are not open to visitors - weakness
- ❑ Target markets appreciate culture
- ❑ Target market searching for unique and authentic learning and interaction experiences with Aboriginal culture

Recurring Results

- Target markets tend to take longer trips (13 days or more)
- Target market persistently incorporate Aboriginal Tourism in their travel itineraries
- Older travellers interested in low physical engagement – younger travellers interested in high physical engagement
- Challenges seem to be similar across Canada, and not necessarily unique to Aboriginal Tourism – Tourism in general and Aboriginal communities

Research Gaps

- More research on US and Canada Aboriginal Tourism potential – as consumers
 - Interest
 - Needs and wants
 - Potential volume
- Developing the NWT Aboriginal Tourism Sector
 - Defining Aboriginal Tourism
 - Defining target markets
 - Defining marketing strategies
 - Do our products meet the needs and wants?
 - How do we improve our products?
 - How do we create a strong sector?

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Thank You!

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