Industry Canada / Aboriginal Business Canada with the Support of Alberta Economic Development

Alberta Aboriginal Tourism Product Opportunity Analysis

March 2002

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Executive Summary

Industry Canada – Aboriginal Business Canada with the support of Alberta Economic Development commissioned this study to better understand the existing supply and demand for aboriginal tourism products in Alberta and to identify potential future development opportunities. More specifically, the main objectives of the study were to:

- Assess existing and potential market demand for Alberta's aboriginal tourism products in domestic and key international markets;
- Assess the existing aboriginal tourism product inventory in the province including status, market readiness, ability to ensure delivery, and relevance to demand; and
- Provide recommendations on potential aboriginal tourism product opportunities for Alberta based on identified product gaps and opportunities for product enhancement.

The following sections present highlights from the report.

Demand For Aboriginal Culture Tourism In Alberta

Results show that there is significant demand for aboriginal culture tourism products both domestically and internationally. In terms of geography, there are three main geographic markets identified in this study:

- ***The Short-Haul Market*** encompasses Alberta and its border provinces / states – i.e., British Columbia, Saskatchewan, NWT, Nunavut, Yukon and Montana.
- ***The North American Long-Haul Market*** is defined as encompassing all regions of Canada and the United States that are not included in the Short-Haul Market.
- ***The Long-Haul Overseas Market*** is defined as all regions outside of Canada and the United States.

In addition to the geographic markets, two sub-segments were identified as having better than average potential for the aboriginal tourism industry in Alberta. These segments are defined as follows:

- ***Primary Market – The Aboriginal Culture Segment:*** For both the Short-Haul and North American Long-Haul markets, the Aboriginal Culture segment is defined as travellers who have either *"attended aboriginal culture experiences in a remote or rural location"* or *"attended a powwow or other aboriginal celebration"* during the past two years. For the Long-Haul Overseas market, the Aboriginal Culture segment is defined as travellers who *"saw or experienced unique aboriginal or native groups"* on their most recent (long-haul) trip.
- ***Secondary Market – The Culture Segment:*** For both the Short-Haul and North American Long-Haul markets, the Culture segment is defined as travellers who fall

into the *"Knowledge Seekers"* segment defined as part of the TAMS study. Culture travellers are likely to have sought out exploratory vacation experiences (such as visiting historical sites and art galleries and museums) and have above average interest in visiting aboriginal cultural attractions. For the sake of interest, a Culture segment was also defined for Canada's top four Long-Haul Overseas markets – the U.K., Germany, France and Japan. The definition varies for each of the overseas markets depending on the available data.

As seen in **Exhibit 1**, the Short-Haul Market offers excellent opportunity for Alberta representing almost 200,000 potential Aboriginal Culture visitors with potential expenditures of about $41 million. The North American Long-Haul market is by far the largest of the three markets with approximately 800,000 potential Aboriginal Culture travellers to Alberta with potential expenditures of $448 million. In addition, the selected Long-Haul Overseas market represent approximately 18.4 million Aboriginal Culture travellers, of which 11.4 million are interested in visiting Canada in the next five years with potential expenditures of $12.4 billion.

EXHIBIT 1 – SUMMARY OF MARKET POTENTIAL

	POPULATION			LIKELIHOOD OF VISITING ALBERTA IN THE NEXT TWO YEARS		POTENTIAL EXPENDITURES (IN MILLIONS)	
	TRAVELLER POP.	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER
Short-Haul Market	5,325,000	406,000	525,000	187,000	283,000	$41.0	$53.8
North American Long-Haul Market	187,181,000	17,286,000	19,619,000	802,000	875,000	$448.4	$487.7
Long-Haul Overseas Market[2]	87,307,000	18,437,000	10,882,000	11,400,000[1]	6,628,000[1]	$12,391	$7,364
Total	***279,813,000***	***36,129,000***	***31,026,000***	***12,389,000***	***7,786,000***	***$12,880***	***$7,906***

[1]BASED ON INTEREST IN VISITING CANADA IN THE NEXT FIVE YEARS.
[2]BASED ON SELECTED KEY MARKETS: GERMANY, U.K., FRANCE, JAPAN, NETHERLANDS, SWITZERLAND, ITALY, TAIWAN, AUSTRALIA AND HONG KONG.

Resource Capability Analysis

In all, there are approximately 112 tourism sites in Alberta that can be considered to offer an aboriginal culture experience. It should, however, be noted that, while there is an abundance of aboriginal tourism sites in Alberta, many are not market ready. In other words, while they are open for business, they do not provide the level of service and amenities required to attract key market segments. The industry is very concentrated in the southern regions of the province, particularly around Calgary. There is also a high concentration of sites around Edmonton. The specific breakdown of sites by type is as follows:

- 9 Accommodations
- 52 Attractions
- 32 Festivals and Events
- 3 Food and Beverage Operators
- 11 Tour Operators
- 5 Tourism Services

With respect to Alberta's tourism infrastructure to support aboriginal tourism:

- Road and air access to and within Alberta is strong and is well established to support aboriginal tourism in Alberta;
- Accommodations are not a significant issue, with the exception of the Rockies and Northern Tourism Destination Regions (TDR) in peak periods, and near reserve-based operations;
- There are sufficient retail and services throughout Alberta to support aboriginal tourism;
- The visitor information centre (VIC) and convention and visitor's bureaus (CVB) are well established in larger communities and those devoted to tourism. Smaller communities, and those based on or around reserves, are typically lacking these types of structures and organizations. For those smaller communities and reserves with significant tourism operations, efforts should be made to establish locally based VIC's or CVB's. Additionally, participation in partnership marketing programs and Niitsitapi are below a level at which their full benefits can be realized; and,
- A high percentage of aboriginal tourism operators utilize new technologies and either maintain their own web site or have their product marketed on another web site.

While the number and magnitude of the barriers that each operator faces will differ depending upon their situation, it is obvious from the research and interviews that the large majority of operators face at least some of these challenges. Overall, a general lack of product development and readiness is the result of these challenges and barriers, specifically:

- Limited funding and access to capital;
- Limited awareness and inadequate marketing of the aboriginal tourism industry in Alberta;
- Limited experience and training in tourism business management;
- Limited understanding of the market for aboriginal tourism; and,
- Social issues such as band politics and labour force attitudes.

Product Opportunities

The product market matching revealed the following seven distinct product opportunities:

- ***Tour Routes:*** These are formally mapped out and marketed itineraries linking several aboriginal tourism products (i.e., historical sites, museums, accommodations, hiking trails, etc.) of a similar theme in a particular geographic area.
- ***Aboriginal Themed Accommodation:*** These accommodations would be designed to offer visitors the opportunity to experience the traditional aboriginal way of life. Some options for development include tipi villages, fly-in fishing/hunting lodges, campgrounds or resorts.
- ***Aboriginal Themed Restaurant:*** A themed restaurant would be designed to offer visitors the opportunity to experience traditional aboriginal cuisine.

- ***Casino:*** This would be a casino similar to those on Indian reserves elsewhere in North America.
- ***Packaging Opportunities:*** Packages would consist of a combination of a number of select products and services that would normally be purchased separately, but which in a package are offered as a single product at a single price. Packages could be built around sub-themes that are relevant to the target markets, such as culture and history, adventure/eco-tourism and/or experiential.
- ***Aboriginal Cultural Centre:*** This attraction would represent a learning centre, where visitors could get an appreciation for aboriginal life and culture. The attraction could incorporate a vast array of components both indoors and outdoors.
- ***Re-enactive/Interactive Villages:*** This attraction would essentially consist of an aboriginal village recreated to reflect an actual village as it may have stood in a chosen time period. The village would be designed to provide visitors with the opportunity to see the aboriginal way of life in the chosen period. Elements that might be portrayed include living conditions, daily routines, roles of different members of the tribe, diet, processes for making/preparing things and more.

A high-level implementation plan has been outlined in this report for five of these opportunities (all but tour routes and casinos). It should be noted that the two opportunities not selected for this section are also excellent opportunities that merit further investigation.

Conclusions

- There is significant demand for aboriginal tourism products.
- A good base of aboriginal tourism products already exists throughout the province. However, there is a need to educate stakeholders of the benefits of tourism and for better cooperation among existing operators.
- While there are no major holes in the "hard" infrastructure, there are some serious issues around the "soft" infrastructure, specifically in the areas of skilled staff and marketing.
- A successful marketing program is a key element to enhancing visitation to the Province and to the various aboriginal tourism attractions. The industry fragmentation and lack of a co-ordinated marketing effort is a major hinderance to the industry. There is a definate need for marketing program that is a co-operative venture between all aboriginal tourism operators and led by a central organization such an Alberta wide aboriginal tourism body.
- One of the issues identified through the research is the lack of awareness of the benefits created by Aboriginal Tourism, both within the aboriginal community and outside the community. Clearly, some form of communications plan needs to be in place so that people, including the various bands and their chiefs, can understand the importance of the industry and its economic benefits.
- Several key actions were identified as being critical to industry survival. Specifically, the industry needs to:

- develop a vision and long-term marketing strategy for the industry;
- develop a communications plan to enhance the understanding of the benefits of tourism within the aboriginal community; and
- develop training programs for tourism industry staff.

- ♦ The aboriginal tourism industry in Alberta is at an early stage in its development. To grow, it must adopt a strategy to gradually improve its coordination, co-operation and marketing efforts as well as its overall product offering.
- ♦ The bottom line is that for the aboriginal industry to grow, buy-in and consensus among the various players (aboriginal operators, bands, chiefs etc.) is critical. The major challenges of marketing, training, social issues and education also need to be addressed.
- ♦ The Alberta aboriginal tourism industry can learn from other destinations like British Columbia, NWT, Ontario, Montana, South Dakota, Utah, New Mexico etc. to understand how the native people representing those areas have developed their tourism industries.

This report is not intended to provide a detailed business plan; rather it provides a starting point for industry stakeholders. There is still much work and research to be done before any of the opportunities can be brought to market. It is now up to industry stakeholders to grab hold of these opportunities and make the industry world-class.

Table of Contents

1. Introduction

Industry Canada – Aboriginal Business Canada with the support of Alberta Economic Development commissioned this study to better understand the existing supply and demand for aboriginal tourism products in Alberta and to identify potential future development opportunities. More specifically, the main objectives of the study were to:

- Assess existing and potential market demand for Alberta's aboriginal tourism products in domestic and key international markets;
- Assess the existing aboriginal tourism product inventory in the province including status, market readiness, ability to ensure delivery, and relevance to demand; and
- Provide recommendations on potential aboriginal tourism product opportunities for Alberta based on identified product gaps and opportunities for product enhancement.

The intent of this report is to provide a foundation for moving the Alberta aboriginal tourism industry forward so that it can compete for tourists with other aboriginal culture destinations.

This report is organized accordingly:

- Chapter 2 presents a detailed analysis of the demand for aboriginal tourism products in domestic and international markets.
- Chapter 3 provides an overview of the current aboriginal tourism product and infrastructure in Alberta. It also discusses the challenges and barriers faced by industry operators.
- Chapter 4 presents the product market matching and gap analysis and presents product opportunities to fill those gaps.
- Chapter 5 details a high-level implementation strategy for priority action items and to bring the various products to market.
- Chapter 6 summarizes the key findings in this report.

2. Demand for Aboriginal Culture Tourism in Alberta

Defining the Target Markets

Geographic Markets

There are three main Geographic Markets that will be examined as part of this study:

- ***The Short-Haul Market*** encompasses Alberta and its border provinces / states – i.e., British Columbia, Saskatchewan, NWT/Nunavut, Yukon and Montana (see **Exhibit 2-1)**.

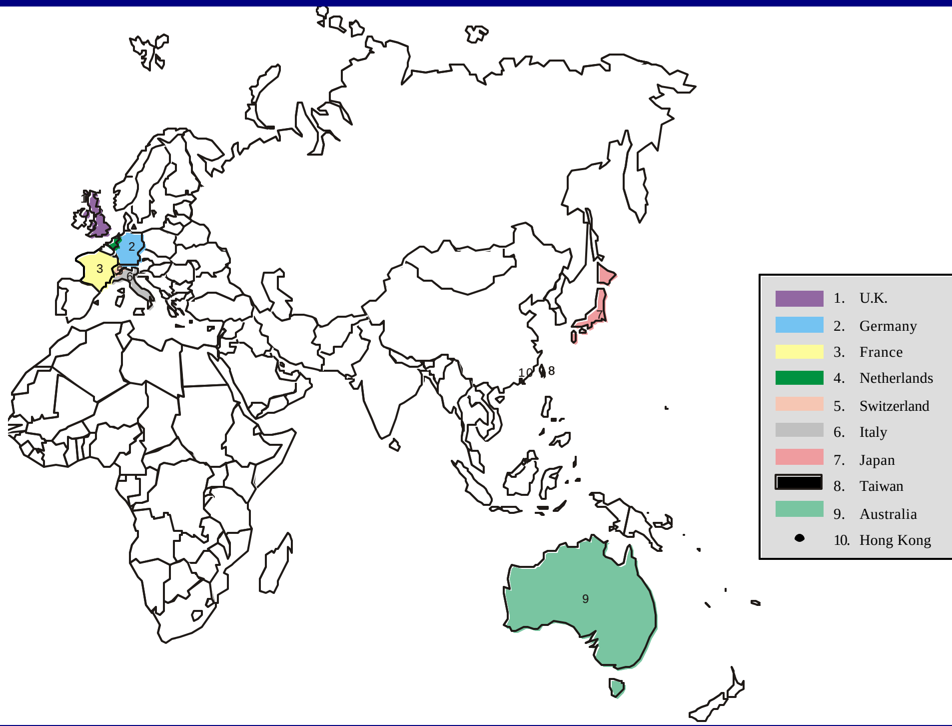
EXHIBIT 2-1 – SHORT-HAUL MARKET

- ***The North American Long-Haul Market*** is defined as encompassing all regions of Canada and the United States that are not included in the Short-Haul Market (see **Exhibit 2-2**).

EXHIBIT 2-2 – NORTH AMERICAN LONG-HAUL MARKET

- ***The Long-Haul Overseas Market*** is defined as all regions outside of Canada and the United States. For the purposes of this study, only markets for which data was available from previous research are assessed for market size and potential (see **Exhibit 2-3**).

EXHIBIT 2-3 – LONG-HAUL OVERSEAS MARKET



Primary Market – The Aboriginal Culture Segment

For both the Short-Haul and North American Long-Haul markets, the Aboriginal Culture segment is defined as travellers who have either *"attended aboriginal culture experiences in a remote or rural location"* or *"attended a powwow or other aboriginal celebration"* during the past two years. This segment definition stems from the Travel Activities & Motivations Study (TAMS) conducted by the Ontario Ministry of Tourism, Culture and Recreation and other study partners.

For the Long-Haul Overseas market, the Aboriginal Culture segment is defined as travellers who *"saw or experienced unique aboriginal or native groups"* on their most recent (long-haul) trip. Segment data from the Long-Haul Overseas markets comes from the Pleasure Travel Markets Studies (PTMS) and other consumer studies conducted for the Canadian Tourism Commission (CTC).

Secondary Market – The Culture Segment

For both the Short-Haul and North American Long-Haul markets, the Culture segment is defined as travellers who fall into the *"Knowledge Seekers"* segment defined as part of the TAMS study. Culture travellers are likely to have sought out exploratory vacation experiences (such as visiting historical sites and art galleries and museums) and have above average interest in visiting aboriginal cultural attractions.

For the sake of interest, a Culture segment was also defined for Canada's top four Long-Haul Overseas markets – the U.K., Germany, France and Japan. For each market, the Culture segment was determined using a factor analysis to determine how the segment should be defined. More details on segment definitions can be found later in this chapter in the Long-Haul Overseas market profiles.

Market Potential by Geography

The following sections present estimates of market size and potential among primary and secondary markets. It should be noted that estimates represent potential travel that may or may not be realized in the future. In other words, the estimates do not represent a forecast; rather it is a pool of prospective travellers with appropriate product interests from which to draw. In addition, these estimates are not all encompassing. They represent a market with greater likelihood of travelling to Alberta for the aboriginal culture product. Actual visitors to Alberta may be from different segments.

The Short-Haul Market

Exhibit 2-4 shows the total market size of each province / state within the Short-Haul Market. Also presented is the number of travellers likely to travel to Alberta in the next two years and their potential expenditures.

EXHIBIT 2-4 – MARKET POTENTIAL FOR THE SHORT-HAUL MARKET

	POPULATION			LIKELIHOOD OF VISITING ALBERTA IN THE NEXT TWO YEARS[1]		POTENTIAL EXPENDITURES (IN MILLIONS)[2]	
	TRAVELLER POP.	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER
Alberta	1,702,000	102,000	221,000	76,000	165,000	$9.6	$20.8
British Columbia	2,408,000	193,000	193,000	76,000	76,000	$18.9	$18.9
Saskatchewan	574,000	34,000	46,000	25,000	34,000	$6.9	$9.3
NWT/ Nunavut / Yukon	51,000	n/a	n/a	n/a	n/a	n/a	n/a
Montana	590,000	77,000	65,000	10,000	8,000	$5.6	$4.8
Total Short-Haul Market	***5,325,000***	***406,000***	***525,000***	***187,000***	***283,000***	***$41.0***	***$53.8***

Notes: [1] Likelihood potentials are specific to Alberta. Likelihood is measured as those selecting the top score on a three-point scale. Source: TAMS (2000) and 2001 Impact of September 11th on US Travel to Canada Study (CTC).
[2] Expenditures are calculated by multiplying those very likely to visit by the average per person per trip (Alberta-specific) expenditures from the 1999 CTS for the Canadian provinces (Alberta - $126; British Columbia - $250; Saskatchewan - $273, Other Canada - $469) and from the 1999 ITS for Montana (Mountain - $594.8).

The Short-Haul Market offers excellent opportunity for Alberta. Given its relatively close proximity, the almost 200,000 potential Aboriginal Culture visitors from the Short-Haul Market could easily be enticed to take frequent day trips, weekend getaways and longer trips to Alberta if offered the right mix of tourism products. While the yield per trip is low, they offer good opportunities in terms of volume. Generally speaking, the closer the market is to the destination, the more likely they are to actually visit. The potential expenditures from the Short-Haul Market for Aboriginal Culture Travellers are $41 million.

There are approximately 283,000 Culture travellers who are likely to visit Alberta in the next two years with potential expenditures of $54 million from the Short-Haul Market.

The North American Long-Haul Market

Market sizes, potential visitor estimates and potential expenditures for the North American Long-Haul market are summarized in **Exhibit 2-5**.

EXHIBIT 2-5 – MARKET POTENTIAL FOR THE NORTH AMERICAN LONG-HAUL MARKET

	POPULATION			LIKELIHOOD OF VISITING ALBERTA IN THE NEXT TWO YEARS[1]		POTENTIAL EXPENDITURES (IN MILLIONS)[2]	
	TRAVELLER POP.	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER
CANADIAN MARKET:							
Manitoba	653,000	65,000	65,000	23,000	23,000	$10.7	$10.7
Ontario	6,797,000	408,000	544,000	35,000	46,000	$23.0	$30.6
Quebec	4,393,000	220,000	308,000	7,000	10,000	$3.4	$4.7
Atlantic Canada	1,404,000	81,000	120,000	6,000	10,000	$2.7	$4.9
UNITED STATES MARKET:							
South Atlantic	32,766,000	3,277,000	3,604,000	93,000	103,000	$65.4	$72.0
East South Central	10,747,000	1,397,000	1,075,000	31,000	24,000	$15.5	$11.9
West South Central	18,324,000	1,832,000	2,199,000	93,000	111,000	$74.4	$89.3
Mountain	10,328,000	1,343,000	1,136,000	166,000	140,000	$98.7	$83.5
Pacific	26,378,000	2,902,000	3,165,000	202,000	221,000	$93.9	$102.4
West North Central	12,020,000	1,202,000	1,322,000	23,000	25,000	$11.8	$13.0
East North Central	29,233,000	2,339,000	2,923,000	82,000	102,000	$31.8	$39.8
Middle Atlantic	25,580,000	1,535,000	2,046,000	24,000	32,000	$9.9	$13.2
New England	8,558,000	685,000	1,112,000	17,000	28,000	$7.2	$11.7
Total North American Long-Haul Market	***187,181,000***	***17,286,000***	***19,619,000***	***802,000***	***875,000***	***$448.4***	***$487.7***

Notes: [1] Likelihood potentials are specific to Alberta. Likelihood is measured as those selecting the top score on a three-point scale. TAMS (2000) and 2001 Impact of September 11th on US Travel to Canada Study (CTC).

[2] Expenditures are calculated by multiplying those very likely to visit by the average per person per trip (Alberta-specific) expenditures from the 1999 CTS for the Canadian provinces (Ontario - $663; Other Canada - $469) and from the 1999 ITS for the U.S. regions (South Atlantic - $700.2; East South Central - $500.0; West South Central - $801.0; Mountain - $594.8; Pacific - $464.1; West North Central - $516.5; East North Central - $390.3; Middle Atlantic - $405.7; New England - $413.7).

As can be seen in the exhibit, the North American Long-Haul market is by far the largest of the three markets. However, it may be one of the most difficult to attract due to heavy competition from the U.S., especially given the fact that the majority of these North American Long-Haul travellers (93%) reside in the U.S. To attract this market, Alberta will have to sell itself on the uniqueness of its product offering to differentiate itself from other destinations within North America offering aboriginal and cultural products. The table also shows that there are approximately 800,000 potential Aboriginal Culture travellers to Alberta with potential expenditures of $448 million.

There are approximately 875,000 Culture travellers who are likely to visit Alberta in the next two years with potential expenditures of $488 million from the North American Long-Haul Market.

The Long-Haul Overseas Market

Exhibit 2-6 presents the market size and potential for selected Long-Haul Overseas markets. It is important to note that these market sizes and estimates represent outbound long-haul travellers only (i.e., domestic travel and travel to nearby countries is not included).

EXHIBIT 2-6 – MARKET POTENTIAL FOR THE LONG-HAUL OVERSEAS MARKET

	POPULATION			INTEREST IN VISITING CANADA IN THE NEXT FIVE YEARS[1]		POTENTIAL EXPENDITURES (IN MILLIONS)[2]	
	LONG-HAUL TRAVELLER POP.	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER
EUROPE:							
U.K.	13,526,000	4,058,000	2,922,000	2,678,000	2,045,000	$3,107	$2,372
Germany	11,641,000	2,328,000	1,676,000	1,294,000	671,000	$1,389	$720
France	9,149,000	1,464,000	2,104,000	820,000	1,115,000	$862	$1,173
Netherlands	4,994,000	1,748,000	n/a	926,000	n/a	$957	n/a
Switzerland	2,491,000	1,121,000	n/a	706,000	n/a	$833	n/a
Italy	9,287,000	4,922,000	n/a	3,052,000	n/a	$2,963	n/a
ASIA-PACIFIC:							
Japan	26,128,000	1,045,000	4,180,000	902,000	2,797,000	$999	$3,099
Taiwan[3]	3,269,000	294,000	n/a	68,000[4]	n/a	$83	n/a
Australia	4,404,000	925,000	n/a	592,000[4]	n/a	$753	n/a
Hong Kong[3]	2,418,000	532,000	n/a	362,000	n/a	$445	n/a
Total Long-Haul Overseas Market	***87,307,000***	***18,437,000***	***10,882,000***	***11,400,000***	***6,628,000***	***$12,391***	***$7,364***

Notes: [1] Five-year interest potentials are generally specific to Canada as a whole for the Long-Haul Overseas markets. Interest is measured as those selecting the top two scores on a four point scale (i.e., very + somewhat interested). Source: CTC's Pleasure Travel Markets to North America Studies (PTMS) for U.K. (1996), Japan (1995), Taiwan (1994) and Australia (1995), Germany Consumer Research Study (CTC 2001), Hong Kong Consumer Research Study (CTC 2001), 2000 Demand for Aboriginal Culture Products Study (CTC) and the 1998 France Segmentation Study (CTC).

[2] Expenditures are calculated by multiplying those likely to visit by the average per person trip expenditures from the 2000 ITS for U.K. ($1,160), Germany ($1,073) and France ($1,052) and the 1999 ITS for the Netherlands ($1,033), Italy ($971), Japan ($1,108) and Australia ($1,272). Switzerland was calculated using the 'Other Europe' expenditures from the 1999 ITS ($1,079) and Taiwan / Hong Kong are calculated using the 'Other Asia' expenditures from the 1999 ITS ($1,230).

[3] For Taiwan and Hong Kong, the Aboriginal Culture segment was defined based on those who indicated that experiencing unique native groups is very important in selecting a vacation destination, as opposed to activity based.

[4] For Taiwan and Australia, five-year interest potentials are based on the whole market, as opposed to the Aboriginal Culture segment.

As seen in the exhibit, the selected Long-Haul Overseas markets represent approximately 18.4 million Aboriginal Culture travellers, of which 11.4 million are interested in visiting Canada in the next five years with potential expenditures of $12.4 billion. There are approximately 6.6 million Culture travellers who are interested in visiting Canada in the next five years with potential expenditures of $7.4 billion from four of Canada's key Long-Haul Overseas markets (i.e., the U.K., Germany, France and Japan).

The key to reaching the Long-Haul Overseas market is awareness. Many of the travellers who think of Canada as a top of mind destination know what some of its main product offerings are, but research shows that often, this is the extent of their knowledge. Travellers from most of these markets do not think Canada has a strong cultural offering. Awareness building in the Long-Haul Overseas markets is a must. In addition, offering packages around Alberta's more commonly known cities and attractions may be one way to capture Long-Haul Overseas interest (i.e., day trips from major metropolitan centres).

North America

Canada

The domestic market is the primary market for the Canadian tourism industry accounting for 70% of total Canadian tourism revenues and 80% of total visitation. Virtually all regions of the country contribute to tourist activity in Canada. Free time is increasing in importance, and many Canadians are choosing to make the most of their time off work by travelling away from home. In fact, on average, Canadian residents took 4.0 intra-provincial pleasure trips and 1.7 inter-provincial pleasure trips during the last two years (TAMS 2000). Some key trends in the Canadian market include:

- The overwhelming majority of trips taken by Canadians are for pleasure purposes (including visiting family and friends).
- Canadians tend to be somewhat less exploratory and somewhat more sports and hobby oriented. They are likely to choose a destination that is familiar and travel to escape the Canadian winter weather.
- Participation in winter activities (e.g., skiing and snowboarding, snowmobiling and skating / hockey) and seeing natural phenomena (e.g., seeing the Northern lights or other artic experiences) are common vacation activities on their recent trips.
- Canadians have a growing interest in nature, eco-tourism and experiences that are authentic and natural, all of which are available within close proximity to where they live.
- They are highly value-conscious travellers who look for good deals year-round.
- The weak Canadian dollar provides a competitive advantage against destinations abroad. However, Canadians are slowly becoming accustomed to the depreciated value of the dollar, and are altering their travel plans accordingly.
- The Internet has become the dominant medium for both information distribution and commerce, although Canadian consumers appear to still have concerns about security, privacy, customer service and reliability.
- They prefer to travel independently and many prefer to pre-book only a small amount of their travel arrangements. This suggests that tourism businesses place an importance on marketing to walk-by traffic.
- The baby boomer generation is on the verge of becoming the most lucrative travel segment in Canada. They dream of retiring at age 50, resuming the search for the meaning of life.
- Older / retired travellers are more interested in travelling internationally than domestically.

- However, Canadian outbound travellers are a prime segment to be targeted for domestic travel. They are most likely to be the non-family market (singles, couples, empty-nesters), are interested in buying packages, and have a propensity for mid- to long-haul travel.

Canadians perceive Canada as having much to offer in terms of culture and entertainment and opportunities to experience nature and participate in outdoor activities. In addition, Canadians are also likely to view Canada as popular, trendy place with many outdoor activities and lots for families to see and do. They have a strong awareness of Alberta and its attributes, and Alberta has traditionally enjoyed good visitation levels from Canadians outside Alberta – 2.5 million person trips to Alberta in 1999.

According to the TAMS study, 6% of Canadian travellers participated in an aboriginal-related vacation activity in the past two years. It is interesting to note that Canadians are more likely to have encountered aboriginal experiences in a remote setting, than to have visited aboriginal attractions, suggesting that Canadian travellers may be more open to the idea of stepping off the beaten track. Participation levels are highest among mature and well-educated travellers, as well as those who took a domestic trip in the past two years.

Canadian Aboriginal Culture travellers are likely to participate in other cultural activities when they travel (i.e., going to museums, art galleries, concerts, plays, dance and opera performances, local fairs and festivals) and are keen on "soft" outdoor activities (i.e., they want to see wildlife / wildflowers, go whale watching, go hiking / backpacking in wilderness settings, and take to the lakes by fishing, canoeing and kayaking). Because of their strong secondary interest in nature and the outdoors, Canadian Aboriginal Culture travellers can also be targeted for lakeside or seaside resorts, wilderness camping, ski or mountain lodges and drive-in wilderness lodges. **Exhibit 2-7** shows key demographic characteristics of Canadian Aboriginal Culture / Outdoor travellers.

EXHIBIT 2-8 – DEMOGRAPHIC CHARACTERISTICS OF CANADIAN ABORIGINAL CULTURE TRAVELLERS

GENDER:		AGE:		ANNUAL HOUSEHOLD INCOME:	
Male	49%	18-34	29%	Under US$60,000	63%
Female	51%	35-44	23%	US$60,000 to US$99,999	25%
HAVE CHILDREN IN HOUSEHOLD:		45-64	37%	US$100,000 or more	12%
Yes	29%	65+	13%		

Source: Demand for Aboriginal Tourism Products in the Canadian and American Markets (ATTC, CTC and Parks Canada 2001)

According to the TAMS study, 11% of Canadian urban travellers fall into the Culture segment (e.g., are Knowledge Seekers). Overall, Canadian Culture travellers have a very positive impression of Canada as a destination which offers opportunities for cultural and entertainment activities. Moreover, Canadian Culture travellers are more likely to have taken a trip to Alberta, Saskatchewan and Atlantic Canada in the past two years compared to other Canadian destinations, suggesting that Alberta's Cultural product is already quite well received by Canadian travellers.

The U.S.

The U.S. tourism market may be the most competitive in the world, with Americans travelling more, both home and abroad. The U.S. is Canada's largest international tourism market, accounting for 15.2 million trips of one night or more in 2000, however Europe has now surpassed Canada as the most popular destination for U.S. outbound leisure travellers. Tourism is a discretionary expense in the minds of Americans and is largely dependent on the consumer's levels of both confidence and disposable income. Americans work the longest hours in the industrialized world, with the chronic shortage of time moulding their lifestyle and travel behaviour. The greatest challenges in getting Americans to travel outside the U.S. remain the American market's 'lack of time' and short paid vacation periods.

The American traveller's state of mind and attitudes towards travel has clearly been affected by the September 11th events. But, while their willingness to travel has certainly decreased, they are still quite willing to do so. Some key market trends include:

- The overwhelming majority of trips taken by Americans are for pleasure purposes (including visiting family and friends).
- While pleasure travel is more frequent during the summer season in the U.S., Americans are also likely to travel during the spring and fall seasons.
- American pleasure travellers are likely to seek out natural wonders, historical sites, adventure and excitement and different cultures when they travel. They also want to visit a casino to gamble.
- Vacation activities enjoyed by American travellers include in water sports (sailing, wind surfing, scuba diving), extreme summer sports (e.g., hang-gliding, parachuting, bungee jumping), extreme winter sports (e.g., rock climbing, ice climbing), fishing / hunting and fitness activities.
- Americans are likely to have participated in most types of cultural and entertainment activities while travelling during the past two years.
- Americans are also likely to have taken a greater number of tours and cruises.
- When it comes to selecting a destination post-September 11th, the top considerations for American travellers are safety (both personal and environmental), airport security and cleanliness of the destination. Conversely, international flavour and different cultures rank low on the consideration scale.
- The extremely favourable exchange rate for Americans continues to enable tour operators to deliver excellent value packages to Canada.
- Tour operators believe that there will be an increase in demand for motor coach and non-air travel packages post-September 11th. In other words, a larger Short-Haul market.
- American consumers are embracing the Internet as their preferred medium for researching and booking travel.

- Americans are likely to have purchased resort or cruise vacation packages. Adventure packages and educational packages are also commonly chosen.
- As the market ages, 'baby boomers' who are reaching retirement age hold a lot of potential.
- Mature and middle aged travellers have an affinity for nature, the natural and authenticity.

Interest in and likelihood of visiting Canada by American travellers is very strong. Moreover, Canada (and Alberta) enjoys a high ratio of repeat visitors from the U.S. resulting in high loyalty. "The U.S. markets with the highest incidence of travel to Canada are primarily situated along the Canadian border and include urban centres such as Rochester, Seattle, Buffalo, Detroit, Cleveland and Toledo. However, Detroit, Boston, Chicago, New York City and Seattle are the urban centres that generate the largest number of trips to Canada. Not surprisingly, proximity dictates the prime markets for each province."[1]

American travellers rate Canada high on safety and security, cleanliness, friendliness and political stability – all of which are of increasing importance in light of the events of September 11th. American travellers view Canada as being very similar to the U.S. when it comes to culture and international flavour, but sees Canada as a place offering abundant opportunities to experience nature and participate in outdoor activities. Many do not name Canada as a top of mind destination to see and experience aboriginal culture. Traditionally, Canada attracts an older, more affluent, and higher educated U.S. traveller.

It must be noted that most Americans have little of no knowledge of Alberta's whereabouts and many are confused as to whether it is a city or a province. Some Americans are aware of the names Edmonton and Calgary, but there is very little tourism association and a weak link between these two cities and Alberta. It is felt that Alberta offers a different, but not too foreign experience to American travellers – an authentic outdoors destination (e.g., unspoiled, uncrowded and peaceful). Its cities are safe, clean and slower paced, but not behind the times. Albertans are seen as friendly, caring and welcoming.[2]

According to the TAMS study, 10% of U.S. travellers participated in an aboriginal-related vacation activity in the past two years. It is interesting to note that Americans are more likely to have visited aboriginal attractions, than to have encountered aboriginal experiences in a remote setting. Participation levels are highest among mature / senior and well-educated travellers, as well as among those who took a trip to Canada from the U.S. in the past two years.

Like Canadian Aboriginal Culture travellers, American Aboriginal Culture travellers are also likely to participate in other cultural activities when they travel (i.e., take in art galleries, attend cultural performances, visit carnivals and local fairs) and are also keen on "soft" outdoor activities (i.e., they want to see natural wonders, wildlife / wildflowers, go hiking / backpacking in wilderness settings, and take to the lakes by fishing, canoeing and kayaking).

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[1] Travel Activities & Motivations Survey – Overview Report, March 2001, Ontario Ministry of Tourism, Culture and Recreation and other study partners, prepared by Lang Research.
[2] Strategic Tourism Marketing Plan 2001 - 2004, April 2001, Travel Alberta

Because of their strong secondary interest in nature and the outdoors, Aboriginal Culture travellers can also be targeted for lakeside or seaside resorts, camping, ski or mountain lodges and drive-in wilderness lodges. Interestingly, casinos and gambling, antique shopping and shopping for local arts and crafts are also common interests among American Aboriginal Culture travellers. **Exhibit 2-8** shows key demographic characteristics of American Aboriginal Culture / Outdoor travellers.

EXHIBIT 2-8 – DEMOGRAPHIC CHARACTERISTICS OF U.S. ABORIGINAL CULTURE TRAVELLERS

GENDER:		AGE:		ANNUAL HOUSEHOLD INCOME:	
Male	48%	18-34	29%	Under US$60,000	66%
Female	52%	35-44	25%	US$60,000 to US$99,999	27%
HAVE CHILDREN IN HOUSEHOLD:		45-64	35%	US$100,000 or more	10%
Yes	26%	65+	12%		

Source: Demand for Aboriginal Tourism Products in the Canadian and American Markets (CTC 2001)

According to the TAMS study, 13% of U.S. urban travellers fall into the Culture segment (e.g., are Knowledge Seekers). Overall, U.S. Culture travellers do not see Canada as offering culture and entertainment, but primarily as a place to experience nature and participate in outdoor activities, suggesting the need for active promotion of Canada's (and Alberta's) culture products south of the border. However, American Culture travellers are likely to have visited Alberta in the past two years, which bodes well for Alberta in terms of repeat visitation.

Long-Haul Aboriginal Culture Travellers

As stated before, the Aboriginal Culture segment is defined as travellers who have either *"attended aboriginal culture experiences in a remote or rural location"* or *"attended a powwow or other aboriginal celebration"* during the past two years. Aboriginal Culture travellers in North America are very likely to have sought out vacation experiences associated with exploration (e.g., visiting historical sites, natural wonders) and sports and learning (e.g., to experience a hands-on learning experience) and are likely to have participated in natural sightseeing activities. They are also likely to have toured in their own personal vehicles and to have camped in a public campground or in the wilderness, to stay at a lakeside or wilderness lodge, or remote fly-in lodge.

Aboriginal Culture travellers are likely to have consulted with a large number of information sources (e.g., articles in newspapers / magazines, travel information offices and travel guides) in planning their vacations, suggesting that print media may be the way to go. In addition, a key to attracting Aboriginal Culture travellers to Alberta will be product packaging. Aboriginal Culture travellers look for a mix of experiences on their vacations beyond just aboriginal culture. They look for destinations that offer a combined natural, cultural and learning-related experience for their trips, all of which Alberta has in abundance.

Long-Haul Culture Travellers

The Culture segment is defined as travellers who fall into the *"Knowledge Seekers"* segment defined as part of the TAMS study. Culture travellers are likely to have sought out exploratory vacation experiences (such as visiting historical sites and art galleries and museums) and have above average interest in visiting aboriginal cultural attractions. They are also interested in learning about and experiencing nature and can also be targeted for natural sightseeing activities and, albeit to a lesser extent, outdoor adventure activities such as canoeing, kayaking, hiking, biking and skiing. On the other hand, they are relatively uninterested in indulging themselves while on vacation.

Culture travellers are primarily younger families or mature singles and couples. They are a well-educated segment and prefer to use their vacations as a learning opportunity for themselves and their children. Given the fact that over a third of Culture travellers travel with young children, it is not surprising that they look for short-haul destinations and travel during the summer months. Culture travellers are more likely than others to have camped in a public campground or the wilderness, and favour touring small towns and villages by car. They are less likely to seek inclusive vacation packages.

Like Aboriginal Culture travellers, Culture travellers carefully research their vacation destination – which emphasizes the importance of proper messaging and promotion to this segment. Culture travellers are well suited for print media campaigns, given their preference towards using travel information obtained from travel bureaus, articles from newspapers / magazines, automobile clubs and travel guides in planning their vacations.

It is important to keep in mind that, by definition, a Culture traveller is an urban oriented traveller, so promoting packages that include aboriginal culture products as well as Alberta's cities that offer various cultural and learning opportunities will be key in attracting this market. However, this does not mean that travel offerings need to ignore rural Alberta. Cultural and learning day trips or overnight stays departing from a major city may also appeal to these travellers.

Europe

The following sections describe the potential for aboriginal culture products in select European markets in more detail. For each market, a discussion of general travel trends is followed by a look at the potential for Canada, the potential for aboriginal culture products and the potential for other cultural products. If available, a look at the potential for Alberta is also included. Markets covered include Alberta's primary target markets (i.e., the U.K., Germany, Switzerland), its secondary market (i.e., the Netherlands) and its developing markets (i.e., France, Italy). It should be noted that there was insufficient information on Austria (a target market) and the Scandinavian countries (a developing market) to warrant a profile.

U.K.

A report on 'British Lifestyles 2001' by telecommunications company Mintel has dismissed concerns of a recession in the U.K. and predicts that strong consumer confidence and growing disposable income will enable Britons to spend more on travel than they did a decade ago. In addition, a combination of a strong currency, holiday leave of four to six weeks a year and a belief that travel is essential rather than a luxury will continue to strengthen the U.K. outbound market. U.K. travellers are quite sophisticated and have a high awareness of international travel destinations. They have the confidence to travel independently and have specialized needs and interests in terms of travel products. Some additional key market facts and trends include:

- The majority of trips taken are for pleasure or vacation purposes, with visiting friends and relatives (VFR) also an important trip purpose.
- Trips are generally quite long (over three weeks) and are taken with a small travel party.
- Trips tend to be fairly active and revolve around beaches, small towns, local culture and historical places.
- Key motivations include going to new places, cleanliness, safety, nice weather, getting a good deal and increasing knowledge.
- U.K. travellers are also highly motivated by value for money, with a large portion of the market sold on a destination by virtue of price alone. Tourism businesses will benefit from Canada's low dollar in this market.
- U.K. travellers generally rely on travel agents and friends and family for trip planning information.
- According to the TTG U.K. and Ireland, advances in online technology will result in the Internet driving 45% of travel sales, while interactive television will be responsible for 23% of travel sales.
- Package use is fairly low – U.K. travellers seek flexible and innovative travel options.
- The U.K. population is aging – translating into more free time and more disposable income.

The U.K. is Canada's most important overseas market for both volume and receipts. Recent U.K. travellers to Canada tend to be middle-aged individuals, often retired, travelling alone or with their spouse to visit friends and relatives living in Canada. Almost half of all trips to Canada are for VFR purposes.

According to the 1996 U.K. PTMS Study, approximately 52% of U.K. long haul pleasure travellers rate aboriginal culture as an important (very + somewhat) motivating factor for destination selection. Participation in aboriginal culture on the most recent trip sits at 30% of U.K. long haul pleasure travellers. In addition to cultural activities, U.K. Aboriginal Culture travellers sought sightseeing related activities on their most recent trip, including visiting small towns and villages, visiting scenic landmarks, visiting national parks and forests and sightseeing in cities. They also place a high importance on having a variety of things to see and do on their trips. U.K. Aboriginal Culture travellers tend to be middle-aged, well educated, and are more likely to be male. Demographic characteristics of U.K. Aboriginal Culture travellers are summarized in **Exhibit 2-9**.

Exhibit 2-9 – Demographic Characteristics of U.K. Aboriginal Culture Travellers					
Gender:		**Region of Origin:**		**Education:**	
Male	57%	North West	7%	College / University Degree:	32%
Female	43%	Scotland	12%	**Monthly Household Income:**	
Age:		West Midlands	10%	Less than £10,000	19%
18-24	13%	East Midlands	5%	£10,001 to £15,000	9%
25-34	23%	Wales	2%	£15,001 to £20,000	14%
35-44	15%	Yorkshire / Humberside	11%	£20,001 to £25,000	16%
45-64	44%	North East	3%	£25,001 to £30,000	13%
65+	5%	Greater London	14%	£30,001 to £40,000	13%
Marital Status:		South East	22%	More than £40,000	16%
Married	54%	South West	8%	**Have Children Under 18:**	
Single	27%	East Anglia	6%	Yes	19%

Source: 1996 U.K. PTMS Study (CTC)

Overall, there is a high interest in the U.K. market in exploring and learning about different cultures. U.K. Local Culture travellers enjoy absorbing the local flavour (i.e., local crafts and foods) and ethnic culture of a destination. They are a people oriented group who like to meet and mingle with the locals and with people of different origins. In addition to seeking out arts and cultural attractions when they travel, they also enjoy other aspects of the big city such as nightlife and fine dining. Alberta could promote its broad range of ethnic and native cultures to the U.K. market, coupled with a city or touring experience to take advantage of these characteristics. Ethnic festivals and cultural events could also be included in tour products developed for this market.

U.K. travellers look beyond Canada's larger cities for their vacation experiences, which bodes well for continued strong future visitation to Alberta. Alberta has a positive image in the U.K. market and is noted for its nature, scenery, outdoor activities, friendly people, good infrastructure and safety. Local culture (including aboriginal culture experiences) available in Alberta should be more actively promoted in this market.

Germany

Over the last few years, the German long-haul pleasure travel market has been hit hard by tough economic conditions in Germany. As a result, travellers of lesser means and enthusiasm have been temporarily forced out of the long-haul market. What remains is a group of die-hard travellers – younger, better educated and more affluent than before – who are also increasingly more cost conscious in planning their trips. This has led to many striking changes in this market:

- Family travel is on the rise, while VFR travel has been steadily declining – a clear sign that the market is maturing.
- German travellers are taking shorter trips, participating in fewer vacation activities and have lower per person trip expenditures than five years ago.
- History products are growing in appeal, while interest in nature and ethnic / aboriginal culture products have waned.
- Safety has always been very important to German travellers, and is currently the number one travel motivation in this market.

- Other key motivations include clean destinations, good environmental quality, nice scenery, seeing something new, enriching one's knowledge, good service and friendly local people, good weather and relaxation and escapism.
- In addition, Germans want to experience all of these things for a good price.
- Planning and booking horizons are longer, with travellers taking advantage of early booking discounts.
- The use of the Internet in travel planning is on the rise, as is the use of books and travel guides. However, German travellers still turn to travel agencies when it comes to actually booking their trips.
- Packages are becoming the way to go for most German long-haul travellers, with 61% having used a package on their most recent long-haul trip. Getting added into packages is key if tourism businesses want to succeed in this market.

Canada enjoys high interest levels among the die-hard German travellers that remain, resulting in 5.6 million potential travellers to Canada in the next five years. However, the tough economic climate has made it increasingly difficult for Canada to convert this potential into actual arrivals, resulting in a drop-off in German arrivals to Canada. Recent travellers to Canada are now older, better educated and more affluent than the market as a whole and travel to Canada remains strongly driven by VFR.

According to the 2001 Germany Consumer Research Study, approximately 20% of German long haul pleasure travellers participated in aboriginal culture activities on their most recent trip, while 44% rate it as an important motivating factor for destination selection. Beyond a cultural experience (i.e., seeing local festivals, local crafts, local people and enjoying ethnic culture and events), Aboriginal Culture travellers have a strong secondary interest in nature and history and can also be targeted for visiting national parks and visiting places of religious significance, historical interest or archaeological interest. German Aboriginal Culture travellers tend to be middle-aged, well educated, and mostly male (see **Exhibit 2-10**).

EXHIBIT 2-10 – DEMOGRAPHIC CHARACTERISTICS OF GERMAN ABORIGINAL CULTURE TRAVELLERS

GENDER:		**REGION OF ORIGIN:**		**EDUCATION:**	
Male	59%	Schleswig-Holstein, Hamburg,	20%	College / University Degree:	35%
Female	41%	Bremen, Lower Saxony		**MONTHLY HOUSEHOLD INCOME:**	
AGE:		North-Rhine	28%	DM 3,500 or less	14%
18-24	12%	Hesse, Rhineland, Saarland	17%	DM 3,501 to DM 4,500	20%
25-34	21%	Baden-Wurttemberg	9%	DM 4,501 to DM 5,500	19%
35-44	17%	Bavaria	9%	DM 5,501 to DM 6,500	14%
45-64	44%	Berlin	4%	DM 6,501 to DM 7,500	8%
65+	6%	Mecklenburg-Western	7%	DM 7,501 to DM 9,500	14%
MARITAL STATUS:		Pomerania, Brandenburg,		More than DM 9,500	12%
Married	60%	Saxony-Anhalt		**HAVE CHILDREN UNDER 18:**	
Single	24%	Thuringia, Saxony	5%	Yes	21%

Source: 2001 Germany Consumer Research Study (CTC)

Ethnic and aboriginal culture experiences are not as big a draw for German travellers as they used to be, which likely contributes to some of the difficulties Canada has been experiencing in attracting Germans. More alarmingly, Canada does not have a strong image as a place to experience aboriginal or native culture, which suggests that a marketing or awareness issue may exist. Germans are more apt to think of places like Africa and Australia for these types of experiences. In fact, this is true of Canada's cultural product in general. Culture is a prime area for development and marketing since Canada, and specifically Alberta, has abundant cultural products with the authenticity that the German traveller seeks. Moreover, Culture travellers are interested in Canada, and travellers interested in Canada are more likely to be motivated by culture. For now, adding on a cultural component to a more general trip may be the way to go, since Germans seldom think of themselves as taking a "cultural trip" per se.

Alberta is generally well perceived in the German market. It has a dynamic image, offering visitors something different and a chance to escape from the ordinary, alongside thrills and excitement. Within Canada, it is definitely seen as one of the best places to go for cultural experiences and for broadening one's horizons. It is also rated best on small towns, national parks, outdoors activities, winter sports and sports in general.

Switzerland

As a direct result of a healthy economy, Swiss outbound travel continues to grow annually. The Swiss enjoy a standard of living much higher than average, and place a high priority on travel and other leisurely products. The Swiss long-haul pleasure traveller is relatively young, with average or above average social status. While there is very little recent information published on recent Swiss long-haul travellers, some key trends that are known include:

- The Swiss are among Europe's most independent travellers.
- French speaking Swiss travellers prefer more touring-oriented holidays, whereas German speaking Swiss travellers prefer more outdoors-oriented holidays.
- The Swiss want to experience as much as possible on their holidays, but also place a high importance on getting good value for money.
- Tour operators are offering more combination packages, featuring multiple destinations or product focuses.
- The Swiss rely heavily on the travel trade in their destination decision-making and the majority of bookings are made through the travel trade.
- Internet connections have not been widely developed in Switzerland; therefore consumers are picking up the e-commerce at a slower place.

For the Swiss, Canada is the third most important long-haul destination. The Swiss prefer summer travel to Canada – with winter travel being highly unpopular. Interestingly, French-speaking Swiss traditionally prefer Eastern Canada, while German-speaking Swiss traditionally prefer Western Canada. The upper social classes are where the best opportunity exists for Canada.

According to the 2000 Demand for Aboriginal Culture Products Study, aboriginal culture was rated as important in selecting a destination by 57% of Swiss long haul pleasure travellers. Approximately 45% participated in aboriginal culture activities on their most recent trip. Consistent with the Swiss traveller in general, the Swiss Aboriginal Culture traveller is a younger traveller (60% under 45 years of age). **Exhibit 2-11** also shows that they are high-income earners (24% have monthly incomes of more than SFr. 9,000 – approximately CDN$100,000 per year).

EXHIBIT 2-11 – DEMOGRAPHIC CHARACTERISTICS OF SWISS ABORIGINAL CULTURE TRAVELLERS

GENDER:		**HAVE CHILDREN UNDER 20:**		**MONTHLY HOUSEHOLD INCOME:**	
Male	49%	Yes	32%	Less than 3,000 SFr.	3%
Female	51%	**SIZE OF HOUSEHOLD:**		SFr. 3,000 to 6,000	37%
AGE:		One	20%	SFr. 6,001 to 9,000	35%
15-24	10%	Two	42%	More than 9,000 SFr.	24%
25-34	28%	Three	17%	**LEVEL OF EMPLOYMENT**	
35-44	22%	Four or More	21%	Full Time	59%
45-64	33%	**EDUCATION:**		Part Time	17%
65+	8%	University Degree:	18%	Not Employed	24%

Source: 2000 Demand for Aboriginal Culture Products Study – Switzerland (CTC)

In the minds of Swiss travellers, Canada is generally about nature rather than culture, action and adventure rather than relaxation, and wildlife rather than cities. Marketing, particularly through the travel trade, could help develop the perception that Canada, and particularly Alberta, is a good place to go to experience aboriginal culture. Given the fact that the Swiss market places a high importance on aboriginal culture, this market does hold strong potential for Alberta, particularly among German speaking travellers. However, active promotion of Canada and Alberta as a cultural destination will be needed.

Netherlands

The Dutch economy is strong and consumer confidence high, resulting in strong consumer spending, which bodes well for outbound travel. The Dutch outbound market is mature with a high propensity for overseas travel – one outbound holiday a year is a routine expectation rather than a luxury. Recent Dutch long-haul travellers tend to be middle-aged and quite well off (70% make more than the national average income of Dfl. 50,000). They are notoriously energetic and independent travellers. Other key market trends include:

- The seasonality of Dutch outbound tourism market remains heavily skewed towards the summer months (i.e., July and August).
- The basic holiday for the Dutch is often a relaxation holiday to a sunny beach – a fairly passive vacation that often includes organized day trips.
- Dutch travellers are increasingly looking for a quality of life holiday experience that includes tranquility, attractive scenery, landscape, peacefulness, and a touch of romance. Personal well-being is extremely important.
- Increasingly, Dutch travellers are becoming more interested in experiencing a different culture or getting in touch with nature. In addition, special interest holidays (i.e., safaris, mountain climbing, skiing vacations) are also becoming more common.
- Dutch tourists wish to be assured of their safety while on vacation. The Dutch market reacts adversely to negative news coverage, with travel to destinations dramatically dropping in the face of political unrest, tourist killings and air transportation accidents.

- Dutch travellers are quite price-sensitive.
- They tend to be more comfortable in an English-language environment and prefer visiting regions where language is not a barrier.
- The Internet is growing in the Netherlands – a report by Gartner claims that the Netherlands will have the highest rate of e-commerce transactions in Europe by 2004, when expressed as a percentage of their overall economy.

Leisure travel has overtaken VFR as the main reason for travelling to Canada – reflecting the maturity of this market. Dutch travellers see Canada as a place to go for nature / scenery, safety and environmental quality. Moreover, interesting small towns and local festivals in Canada hold some allure, which bodes well for Canada given the rising importance of culture-related travel in this market.

According to the 2000 Demand for Aboriginal Culture Products Study, participation in aboriginal culture activities on the most recent trip sits at 35% among Dutch long haul pleasure travellers. Forty percent (40%) rate this product as an important motivating factor for destination selection. Dutch Aboriginal Culture travellers are more likely to have high household incomes (only 14% have household incomes that are lower than the national median of Dfl. 50,000). Half are between the ages of 35 and 64 (see **Exhibit 2-12**).

EXHIBIT 2-12 – DEMOGRAPHIC CHARACTERISTICS OF DUTCH ABORIGINAL CULTURE TRAVELLERS

GENDER:		**EDUCATION:**		**HOUSEHOLD INCOME:**	
Male	54%	University Degree:	12%	Less than Dfl. 50,000	14%
Female	46%	**REGION OF ORIGIN:**		Dfl. 50,000 to 75,000	23%
AGE:		Large Cities: Amsterdam, Rotterdam, Hague	16%	More than Dfl. 75,000	63%
15-24	12%			**NUMBER OF PEOPLE IN HOUSEHOLD:**	
25-34	26%	West	36%	One	19%
35-44	20%	North	10%	Two	45%
45-64	31%	East	21%	Three	17%
65+	10%	South	17%	Four or more	19%

Source: 2000 Demand for Aboriginal Culture Products Study – Netherlands (CTC)

Alberta is well regarded for its outstanding scenery, wildlife, personal safety, public transportation, hygiene and cleanliness. Alberta has many products desired by Dutch long-haul pleasure travellers, so the key is to increase awareness of these strengths. However, Dutch travellers do not currently see Alberta as a destination for a culture-related trip, suggesting more promotion of this product offering is needed.

France

French outbound travel has experienced a general slowdown in recent years due to a difficult economic climate, general social unrest, high unemployment and sliding disposable incomes, all of which have contributed to making vacations abroad a much more difficult prospect for this market. However, the French view their holidays as a high priority and are reluctant to forego them, and many continue to travel despite these tough market conditions. Recent French long-haul travellers tend to be middle-aged, married and very well educated. On the other hand, their incomes are typically fairly low with a large portion being out of the workforce (i.e., retired, in school, unemployed or working in the home). Some key market trends include:

- VFR travel is very popular in the French market, accounting for 30% of all recent trips taken. However, it appears to be declining in importance, with only a 17% share of future trips.
- Each French citizen has a minimum of five weeks vacation per year. The obligatory fifth week of leave must be taken outside the main summer holiday season.
- The introduction of the 35-hour working week will have a direct impact on people's leisure time – people are now able to take shorter breaks more often during the year.
- However, most French take their vacations during the peak travel seasons (July, August and December) rather than spread throughout the year.
- Universal activities for French travellers revolve almost exclusively around local and ethnic culture, including the foods, the crafts and the people. In addition, they look for a peaceful safe environment for their trips.
- French travellers are fairly budget conscious, no doubt as a result of their lower household incomes. Price is often the determining factor on who gets the business.
- French travellers rely heavily on travel agents in planning their trips, however Internet bookings have been increasing.
- The number of French citizens with Internet access is rapidly growing, and tourism-related offers are now accompanying this trend.
- French travellers have traditionally taken far fewer package holidays than other major European markets.

France represents Canada's third largest market within Europe. Canada ranks second as a dream destination, behind the U.S. and the Caribbean (which are tied for top spot). Canada tends to attract a fairly upscale market, with those interested in visiting Canada being well off by French standards and enthusiastic about travel in general. Touring trips and VFR account for close to 80% of all trips to Canada, with packages being used by over half of recent travellers.

According to the 1998 France Strategic Segmentation Study, approximately 16% of French long haul pleasure travellers participated in aboriginal culture activities on their most recent trip, while 62% rate it as an important motivating factor for destination selection. French Aboriginal Culture travellers are motivated by opportunities to try local foods, see local crafts, meet different ethnic groups, and of course, meet unique indigenous peoples. This group has a strong secondary interest in nature and sports and can also be targeted for visits to natural ecological sites, wilderness adventures, snowmobiling, other winter sports and spectator sporting events. They are likely to partake in sightseeing opportunities in combination with culture-related activities, including visiting small towns and villages, sightseeing in cities, taking walking tours and visiting scenic landmarks. **Exhibit 2-13** shows that French Aboriginal Culture travellers tend to be older, single, males.

Exhibit 2-13 – Demographic Characteristics of French Aboriginal Culture Travellers					
Gender:		**Region of Origin:**		**Monthly Household Income:**	
Male	61%	Paris	30%	Less than 10,000 FF	21%
Female	39%	Paris Basin	17%	10,000 FF to 12,999 FF	11%
Age:		North	10%	13,000 FF to 15,999 FF	16%
18-24	11%	East	5%	16,000 FF to 19,999 FF	15%
25-34	17%	West	19%	20,000 FF to 24,999 FF	13%
35-44	15%	South-West	8%	25,000 FF to 29,999 FF	12%
45-64	46%	Centre-East	4%	30,000 FF or more	12%
65+	12%	Mediterranean	7%	**Marital Status:**	
Have Children Under 18:		**Education:**		Married	43%
Yes	25%	College / University Degree:	39%	Single	32%
Source: 1998 France Strategic Segmentation Study (CTC)					

French travellers enjoy expanding their cultural horizons when they travel by meeting different people and learning about other cultures. Destinations that offer these products are certain to attract the attention of this market. However, Canada is not generally top-of-mind in the marketplace for local cultural offerings. Canada needs to promote a unique cultural identity in France – something that is readily identifiable with Canada – as well as to develop and market unique cultural products that pique the interest of French culture-seekers. Canada is actually an ideal vacation spot for this group, offering highly accessible native culture, combined with ample nature and sports products.

However, one of the main barriers that Alberta will face is that most of the French travel to Canada focuses on Quebec and Ontario. In fact, in the 1998 Strategic Segmentation Study, less than 1% of respondents mentioned Alberta as a place they would like to visit in Canada. Moreover, not one French Aboriginal Culture traveller named Alberta as a place they would like to visit in Canada. Awareness building will be key to attracting the French market.

Italy

Italians have traditionally preferred to travel within their own country, although this is slowly changing. The propensity for outbound travel tends to be higher among young people (aged 25 to 34). The younger generation is generally more open to the idea of outbound travel, and the purchasing power of this age group is very high since Italians tend to marry late and live at home until their late 20's. Some interesting market characteristics are:

- Trips tend to be shorter and many Italians travel in the off and shoulder seasons to avoid paying high season prices.
- Italians travel to break away, to relax and enjoy new experiences, and enjoy traditional sun and beach vacations.
- They prefer touring holidays that involve moving around, exploring a given region, investigating its specific cultural heritage.
- There is a rising interest in culture and nature products, especially among the middle-aged Italian traveller.

- The general weakness of the lira has made Italian travellers increasingly price-sensitive. As a result, more and more holiday decisions in this market are being made on the basis of price, with the actual destination being less important.
- Although Italians are always in search of the best deal, they are not prepared to compromise on comfort, quality or value. They look for "luxury" and "eliteness" on the vacations.
- Most long-haul trips are purchased through travel agents.
- The Italian market is notorious for booking at the last minute.
- The market also appears to be shifting back to inclusive tour packages.

Canada has very positive outlook for growth in the Italian market. The percentage of those interested in Canada as a holiday destination is far greater than those who have visited in the past. However, the challenge for Canadian marketers will be to convert this interest into actual travel in the coming years. Potential travellers to Canada are young singles and middle-aged travellers, who are well educated, and gainfully employed. They also tend to be experienced long-haul travellers.

According to the 2000 Demand for Aboriginal Culture Products Study, approximately 53% of Italian long haul travellers participated in aboriginal culture activities on their most recent trip, while 71% rate it as an important motivating factor for destination selection. Italian Aboriginal Culture travellers are demographically similar to the Italian long-haul market as a whole (see **Exhibit 2-14**).

EXHIBIT 2-14 – DEMOGRAPHIC CHARACTERISTICS OF ITALIAN ABORIGINAL CULTURE TRAVELLERS

GENDER:		**EDUCATION:**		**PROFESSION:**	
Male	51%	University Degree:	13%	Self-employed	18%
Female	49%	**AGE:**		White collar / employee	27%
REGION OF ORIGIN:		18-24	18%	Tradesman	12%
North West	32%	25-34	21%	Worker / blue collar	4%
North East	19%	35-44	24%	Housewife	9%
Centre	30%	45-64	37%	Student	14%
South & Isles	19%	65+	n/a	Retired / unemployed	17%

Source: 2000 Demand for Aboriginal Culture Products Study – Italy (CTC)

Canada is not necessarily seen as a destination for a "cultural trip" in the classic European sense – Italian travellers simply do not look to Canada for a cultural experience. Instead, they see Canada as a place to go for nature (i.e., natural parks, forests, rivers, mountains) and see it as a spacious tranquil country with good touring opportunities. Nature should remain in the spotlight, but broadened to encompass a multi-ethnic touring style trip – focusing on the diversity of the country, its people and its traditions. Lack of awareness of Canadian (and Albertan) products beyond nature is the major stumbling block in selling aboriginal culture to the Italian market.

Asia-Pacific

Markets covered in this section include Alberta's primary target markets (i.e., Japan, Taiwan and Australia) and one secondary markets (i.e., Hong Kong). Other secondary markets (i.e., New Zealand and South Korea) are not profiled as part of this study due to a lack of recent information.

Japan

The key influence on outbound travel continues to be the Japanese economy. Whilst many believed Japan had turned the corner into sustainable economic growth in 2000, the reality has been disappointing. Japanese consumers' unwillingness to spend disposable income during uncertain economic times has impacted on travel through the growing popularity of either fewer or lower cost holidays. Thus, while the willingness to travel amongst Japanese consumers remains very strong, it is difficult to say what the coming year will bring. Today's Japanese long-haul traveller is more likely to be female, older, better educated and have higher household incomes. They are more sophisticated than in the past, and are starting to make their own destination decisions and plan their own trips. Some key market trends include:

- Pleasure / vacation travel has grown, while combined business-pleasure travel and company paid vacations have dropped.
- Japanese who are working are often limited to 7 to 10 days vacation a year, resulting in a strong shift to shorter trips.
- Safety and security, good travel infrastructure, cultural and heritage products, shopping and escorted flexible tours in Japanese are important elements of the tourism experience.
- Nature is a key draw for the Japanese, with additional interest in touring and city products.
- The Japanese are very price conscious and Japanese travellers are now spending considerably less on their trips. Moreover, many are putting off their long-haul plans until the economy strengthens.
- Top information sources for planning a trip continue to be brochures / pamphlets and travel agencies. Travel guides / books, advertisements and the Internet have increased in importance in trip planning process.
- The booking horizon has lengthened.
- Japanese still prefer pre-packaged tours, but look for more flexibility and customization than the fully planned itineraries offered in the past.
- Internet travel bookings are still relatively rare.
- Outbound travel in the senior, middle-aged and family segments are growing. The growing New 50s segment is seeing increasing demand for fully structured tour packages to multiple destinations.

In spite of the slowdown in the past few years, Japan is still by far Canada's most important tourism market in Asia / Pacific. The middle-aged traveller offers the best potential for Canada, with high interest levels and good price-value perceptions of the destination.

According to the 1995 Japan PTMS Study, approximately 12% of Japanese long haul pleasure travellers rate aboriginal culture as an important motivating factor for destination selection. Participation in aboriginal culture on the most recent trip sits at 4% of Japanese long haul pleasure travellers. Japanese Aboriginal Culture travellers are motivated by visiting some place new where they can meet new people, including different ethnic groups and unique indigenous peoples. This group has a strong secondary interest in the outdoors and can also be targeted for visits to natural ecological sites, outdoor activities, roughing it and rural countryside. They also look for thrills and excitement on their trips. Aboriginal Culture travellers are likely to partake in other local, cultural and nature-related activities on their trips. They are more likely to be young singles, compared to the long-haul population as a whole (see **Exhibit 2-15**). However, a substantial proportion (over 40%) are between 45 and 60.

EXHIBIT 2-15 – DEMOGRAPHIC CHARACTERISTICS OF JAPANESE ABORIGINAL CULTURE TRAVELLERS

GENDER:		**REGION OF ORIGIN:**		**ANNUAL HOUSEHOLD INCOME:**	
Male	55%	Tokyo	89%	Less than ¥3 million	7%
Female	45%	Osaka	9%	¥3 to ¥4.9 million	13%
AGE:		Nagoya	2%	¥5 to ¥6.9 million	23%
18-24	30%	**MARITAL STATUS:**		¥7 to ¥9.9 million	40%
25-34	17%	Married	57%	¥10 to ¥11.9 million	7%
35-44	11%	Single	43%	¥12 million or more	10%
45-64	42%	**HAVE CHILDREN UNDER 18:**		**EDUCATION:**	
65+	0%	Yes	22%	College / University Degree:	41%

Source: 1995 Japan PTMS Study (CTC)

Canada is still among the top-of-mind destinations of Japanese, but more could be done to raise their level of awareness of what is available in Canada. Canada's image in Japan is a wondrous place to see nature, but is known for little else. Canada has many strengths that match what the Japanese travellers are looking for in their vacations including nature, family travel, learning experiences, and diversity of its cities offering good cuisine, entertainment and culture. But considerable awareness building is required to boost their perceptions of Canada for these products. Canada's culture product might be a good place to start since seeing different cultures has evolved to become highly important to Japanese travellers.

Alberta is recognized for its scenic and natural beauty with particular emphasis on mountain and resort tours of Banff and niche products like ski and golf.

Taiwan

Taiwan's economy was one of the least affected by the Asian financial crisis. A strong Taiwan economy suggests good growth potential for long-haul travel, however Taiwan is facing several challenges that could have an impact in the near future – low confidence in the new government, slowdown of the U.S. economy, weak recovery in Japan and an uncertain political situation with mainland China. In addition, the devastation of the earthquake in Taipei has hurt consumer sentiment. Although outbound travel was initially limited to older and more affluent Taiwanese, the market is now getting younger. Key travel trends include:

- Holidays and sightseeing tours are the leading reasons for outbound trips from Taiwan. Family travel is on the rise.

- Demand for packages of shorter duration is increasing, primarily because these tend to be less costly.
- Travel has traditionally been focused on multi-destination tours, however, today's more experienced traveller is looking for more focused trips with fewer destinations and more time to fully explore each one.
- There is also a growing interest in accessible outdoor activities and world-heritage sites.
- The Taiwanese look for personal enrichment when travelling – increasing one's knowledge and travelling to new places is high on the list of key travel motivations. They also seek a clean and healthy environment for their vacation getaways.
- Taiwanese look for a balance between price and quality.
- Group package travel has declined in favour of independently organized trips among younger travellers (i.e., under 40 years of age). However, those over 50 still prefer group travel.

Taiwan ranks behind only Japan as a source of Asian visitors to Canada and Alberta. Canada is known for its unique nature and scenery, its cleanliness and environmental quality, and surprisingly, its exotic atmosphere. It is not seen as a destination offering shopping, culture, history, art and architecture. Traditionally, recent travellers to Canada are younger singles, with more education and higher incomes.

According to the 1994 Taiwan PTMS Study, approximately 40% rate aboriginal culture as an important motivating factor for destination selection (with 9% indicating it was very important). In sharp contrast to many of the other markets,Taiwanese Aboriginal Culture travellers tend to be relatively young, well-educated females (see **Exhibit 2-16**).

EXHIBIT 2-16 – DEMOGRAPHIC CHARACTERISTICS OF TAIWANESE ABORIGINAL CULTURE TRAVELLERS

GENDER:		**AGE:**		**MONTHLY HOUSEHOLD INCOME:**	
Male	39%	18-24	15%	NT$50,000 or less	19%
Female	61%	25-34	36%	NT$50,001 to 70,000	28%
MARITAL STATUS:		35-44	25%	NT$70,001 to 100,000	33%
Married	62%	45-64	23%	NT$100,001 or more	20%
Single	37%	65+	1%		
HAVE CHILDREN UNDER 18:		**EDUCATION:**			
Yes	59%	College / University Degree:	53%		

Source: 1994 Taiwan PTMS Study (CTC)

Alberta is seen as offering spectacular scenic beauty and is well known for its friendly people and its clean, safe and natural environment.

Australia

Forecasts call for increased outbound travel in upcoming years as the new tax system introduces a 10% GST tax on domestic holidays, but not on international travel. The new tax system also provides personal income tax relief to Australians, which raises household disposable incomes. Australians have a lust for travel and tend to take long trips, incorporating many different activities. Other key market trends include:

- Australians are taking shorter, but more frequent holidays. December to March are the most popular months to travel.
- Australians have a generous holiday leave allocation with a standard four weeks vacation plus statutory holidays.
- The market is becoming more sophisticated all the time, with a growing demand for special interest holidays such as sports, history / culture, educational and adventure trips.
- Australian travellers are clearly motivated by seeing the world, meeting new people, and learning new things. Other considerations are cleanliness, personal safety, nice scenery and good value for money.
- VFR is also growing as a travel motivation.
- The Australian market is becoming more budget conscious, with increasing importance being placed on value-for-money when choosing holiday destinations.
- Travel agents are a key source of information on potential destinations.
- There is a strong shift towards greater independence and flexibility in travel, with FIT and self-drive vacations increasing in popularity.

Canada is growing as a top-of-mind destination for Australians. Australians perceive Canada as a scenic, safe and clean country. They are also attracted to Canada's distinct culture and friendly people. Traditionally, an Australian pleasure traveller to Canada is middle-aged or older, often retired, travelling as part of a couple, frequently for VFR purposes. They enjoy nature and the outdoors while on an extended trip to Canada. The majority of travel to Canada occurs between April and October.

According to the 1995 Australian PTMS Study, approximately 21% of Australian long haul travellers participated in aboriginal culture activities on their most recent trip. While data is not available to profile Australia's Aboriginal Culture segment, it is interesting to note that Australia's Culture and Festivals traveller is one who visits arts and cultural attractions, local festivals and ethnic cultural events on their trips. They are primed to visit destinations that can offer different cultural experiences such as local festivals or exposure to unique ethnic groups such as native communities. There is a growing trend in Australia to combine a cultural experience with a history / heritage experience, so trips offering visits to places of historical interest, sites commemorating important people and places with religious significance may also be of interest to these travellers. This segment is predominately female, and is somewhat older than the typical Australian long-haul traveller.

Alberta is perceived to be a scenic, safe and clean environment with friendly people. Australians like to socialize with local people during their vacations and are attracted to Alberta's distinctive culture and friendly people.

Hong Kong

Over the last few years, a number of influential factors have affected the Hong Kong long-haul pleasure travel market, including the handover of Hong Kong back to China and a major economic recession catalyzed by the Asian financial crisis. Currently, Hong Kong enjoys a high standard of living, an affluent population and low personal tax rates by Asian standards, all of which leads to a high propensity for long-haul travel. Long-haul pleasure travellers from Hong Kong are typically well educated, hold good jobs and have excellent spending power. Some key market trends include:

- Pleasure or vacation travel clearly dominates the long-haul market, although VFR travel is taking on increased importance, with the massive emigration of residents before the handover creating new opportunities to visit friends and relatives overseas.
- Touring trips account for just over a third of all trips taken. This market still tends to favour holidays that take them to multiple destinations and allow them to see and do as much as possible.
- Travellers are taking shorter, less expensive trips to closer destinations in response to the economic uncertainties and a new price consciousness.
- Trips driven by more specialized activities (e.g., nature / outdoors, culture / history, beach / resort or sports) are still relatively rare in this embryonic long-haul market.
- Hong Kong travellers are fairly autonomous in their decision-making, typically making the destination choice themselves. However, the vast majority still turn to travel agencies when it comes to actually booking their trips.
- Booking horizons for this market are notably short, with almost three-quarters of travellers booking their most recent trip less than a month before departure. Booking more than six months ahead of time is virtually unheard of in this market.
- The top sources for travel information and trip planning are travel agents and friends / family, although advertising in newspapers and on television may also be good ways to reach and influence this market.
- Use of the Internet is growing in Hong Kong; however, use of the Internet has not yet extended to making bookings.
- All-inclusive packages and guided tours are the likely choices of many Hong Kong travellers for long-haul trips.
- There is also a large proportion of the market that enjoys making their own travel arrangements and having the flexibility to plan their trip as they go.
- The family segment represents a full quarter of the market, which is relatively high compared with other markets.

As a result of ongoing uncertainty in the marketplace, travel to Canada has suffered, with Hong Kong overnight arrivals in 2000 down 29% over 1996 levels. Nevertheless, Hong Kong remains Canada's seventh largest overseas market in terms of overnight arrivals. Potential travellers to Canada are more likely to be motivated by nature (e.g., national parks, ecological sites) and culture / history (historical places, arts and cultural attractions, unique native groups), which reflects the travel interests of the older, more educated group of travellers that make up the potential market to Canada.

According to the 2001 Hong Kong Consumer Research Study, approximately 60% of Hong Kong long haul pleasure travellers rate aboriginal culture as an important motivating factor for destination selection (with 22% indicating it was very important). Aboriginal Culture travellers from Hong Kong tend to be older married travellers (see **Exhibit 2-17**).

EXHIBIT 2-17 – DEMOGRAPHIC CHARACTERISTICS OF HONG KONG ABORIGINAL CULTURE TRAVELLERS

GENDER:		**REGION OF ORIGIN:**		**MONTHLY HOUSEHOLD INCOME:**	
Male	48%	Hong Kong Island	19%	Less than HK$15,000	25%
Female	52%	Kowloon	31%	HK$15,000 to HK$24,999	28%
AGE:		New Territories	50%	HK$25,000 to HK$39,999	17%
18-24	5%	**MARITAL STATUS:**		HK$40,000 to HK$59,999	14%
25-34	23%	Married	70%	HK$60,000 to HK$74,999	5%
35-44	17%	Single	22%	HK$75,000 or more	11%
45-64	35%	**HAVE CHILDREN UNDER 18:**		**EDUCATION:**	
65+	20%	Yes	30%	College / University Degree:	22%

Source: 2001 Hong Kong Consumer Research Study (CTC)

Culture is best sold to the Hong Kong market in combination with history and nature offerings. Culture / History / Nature Buffs are devoted travellers who place a high priority on long-haul travel and feel that money spent on such travel is very well spent. They enjoy a combined culture-history-nature experience, and their interests are broad enough that they are unlikely to be sold on a more specialized product featuring only one type of experience.

They actively seek out opportunities to experience a different culture, arts and cultural attractions and aboriginal culture, together with visiting historical sites and well-known attractions. Nature is a secondary interest, as they look to include wildlife, national parks and scenery as part of their trips. Being avid knowledge seekers, they gravitate towards seeing something new and different, and perhaps even a little exotic.

Currently, Canada is poorly positioned on the culture-history-nature dimension, posting last against its main competitors. While Canada fares not too badly on scenery and nature, with only Australia perceived better, it rates extremely poorly on culture / history (i.e., last or second last on most items). Australia and Europe are typically more appealing destinations than Canada for those with a cultural bent, but this is likely due to low awareness. Canada definitely needs to shore up the culture / history side of things, and also fortify its natural image against Australia's position of strength. Canada will need to develop a more diverse package offering to strengthen its cultural / historical identity to appeal to Hong Kong travellers.

Vancouver and Toronto are understandably the focus of this market's awareness, given the large number of resident Chinese and Hong Kong immigrants in these destinations. The more limited knowledge of other cities and attractions is in line with the fact that Hong Kong is still an emerging market for Canada and one that has not benefited from as much marketing as some of Canada's primary markets. Canada (and Alberta) needs to do some major awareness building in this market to improve general knowledge of its regions, as well as specific places to go and things to see.

Market Demand Summary

As seen in **Exhibit 2-18**, the Short-Haul Market offers excellent opportunity for Alberta representing almost 200,000 potential Aboriginal Culture visitors with potential expenditures of $41 million. The North American Long-Haul market is by far the largest of the three markets with approximately 800,000 potential Aboriginal Culture travellers to Alberta with potential expenditures of $448 million. In addition, the selected Long-Haul Overseas market represent approximately 18.4 million Aboriginal Culture travellers, of which 11.4 million are interested in visiting Canada in the next five years with potential expenditures of $12.4 billion.

EXHIBIT 2-18 – SUMMARY OF MARKET POTENTIAL

	POPULATION			LIKELIHOOD OF VISITING ALBERTA IN THE NEXT TWO YEARS		POTENTIAL EXPENDITURES (IN MILLIONS)	
	TRAVELLER POP.	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER	ABORIGINAL CULTURE TRAVELLER	CULTURE TRAVELLER
Short-Haul Market	5,325,000	406,000	525,000	187,000	283,000	$41.0	$53.8
North American Long-Haul Market	187,181,000	17,286,000	19,619,000	802,000	875,000	$448.4	$487.7
Long-Haul Overseas Market[2]	87,307,000	18,437,000	10,882,000	11,400,000 [1]	6,628,000 [1]	$12,391	$7,364
Total	***279,813,000***	***36,129,000***	***31,026,000***	***12,389,000***	***7,786,000***	***$12,880***	***$7,906***

[1]BASED ON INTEREST IN VISITING CANADA IN THE NEXT FIVE YEARS.
[2]BASED ON SELECTED KEY MARKETS: GERMANY, U.K., FRANCE, JAPAN, NETHERLANDS, SWITZERLAND, ITALY, TAIWAN, AUSTRALIA AND HONG KONG.

3. Resource Capability Analysis

This section provides an overview of the Aboriginal Culture Tourism industry in Alberta at the time of this study. The section begins with a summary of the product inventory followed by an analysis of the supporting infrastructure. The chapter concludes with a look at potential barriers and challenges facing the industry.

Aboriginal Tourism Product Inventory

The first step in assessing the tourism resource capability of a region or specific thematic area is to develop an inventory of tourism businesses that fit the definition. For the purpose of this study, the definition of aboriginal tourism product includes all tourism related businesses that offer an aboriginal themed experience. While these businesses are primarily aboriginal owned, non-aboriginals can also own them.

In all, 112 businesses/attractions in Alberta were identified as meeting these criteria. It should, however, be noted that, while there is an abundance of aboriginal tourism sites in Alberta, many are not market ready. In other words, while they are open for business, they do not provide the level of service and amenities required to attract key market segments.

Interviews were conducted with 48 of these businesses to gather more information on their operations and to better understand the available product in Alberta. The sections below provide a summary of the available aboriginal tourism product in Alberta. While all businesses are listed, detailed information is presented only for the 48 that responded to the survey. A complete database of aboriginal tourism products has been provided to Alberta Economic Development and Aboriginal Business Canada.

This section is intended only to provide an overview of the available product and not to assess needs or opportunities. A detailed product market match (gap analysis) is presented in the next chapter.

Accommodations

As seen in **Exhibit 3-1**, the supply of accommodations with an aboriginal theme is somewhat limited in Alberta. In fact, only nine businesses fell in this category. While the supply is limited, this does not necessarily mean that there is a shortage as there are plenty of non-aboriginal themed accommodations to support the industry. However, it may point to a potential product opportunity.

Exhibit 3-1 – Inventory of Accommodations						
Product Name	**Location**	**Annual Visitors**	**Season**	**Type of Accomm-odation**	**Language**	**Other Tourism Products Offered**
Eagle Bed & Breakfast	Redwood Meadows	50	Year round	Bed & Breakfast	English	Food
Elk Island Retreat	Fort Saskatchewan			Tipi camping		Hiking
Fort Chipewyan Adventure Lodge	Fort Chipewyan	N/A	Year round	Lodge / Resort / Cabins	English/French/ Native	Group tours, interpretive guided tours
Nakoda Lodge & Conference Ce ntre	Morley	N/A	Year round	Lodge / Resort / Cabins	English/Native	Food, self guided tours, group tours, souvenirs, hands on instruction and education of native cultural elements, interpretive guided tours, crafts, historical/tipi ring, sporting activities, canoeing, archery, cultural tourism
Narrows Cultural Resort	Kapawe'no First Nations		Year round	Tipi camping/cabins	English/native	Food, group tours, interpretive hikes, canoeing, kayaking, wildlife viewing and wilderness survival camps
Rock Lake Lodge	Hinton		**Year round**	Lodge / Cabins	English	**Fishing, hiking, horse trail riding**
Sawridge Hotel & Conference Centre	Jasper	110,000	Year round	Hotel & Convention Centre	English/Native/ Japanese/ Spanish	Food, self guided tours, group tours, historical/tipi ring, sporting activities
Sundance Lodges	Kananaskis Country		Spring / Summer	Tipi camping	English	
Stoney Indian Park	Morley	Not Contacted For Interview				

Attractions

A complete inventory of aboriginal themed attractions in Alberta is presented in **Exhibit 3-2**. As seen in the exhibit, there are 52 such attractions throughout Alberta. The aboriginal tourism industry offers an abundance of attractions year round. In fact of the 17 attractions interviewed, 13 operate year round. There is a well diversified mix of attractions throughout the province. Key product offerings include crafts, interpretive sites, museums, native cultural education and cultural centres.

Exhibit 3-2 – Inventory of Attractions						
Product Name	**Location**	**Annual Visitors**	**Season**	**Type of Attraction**	**Language**	**Other Tourism Products Offered**
Athabasca Native Friendship Centre	Athabasca	2750	Year round	Friendship Centre	English / Native	Hands on instruction and education of native cultural elements, group tours, crafts
Blackfoot Gallery	Calgary		Year round	Aboriginal, Cultural / entertainment, Historic attraction		Hands on instruction and education of native cultural elements, historic attraction
Carmangay	Carmangay			Tipi Rings		
Centennial Museum and Archives	Peace River			Museum		
Chief Chiniki Restaurant & Arts & Crafts	Morley	N/A	Year round	Craft Shop	English / Native	Crafts, food, souvenirs
Chief Crowfoot Monument	Siksika		Year round	Statue, Monument	English / Native	Statue, group tours
Dry Island Buffalo Jump Provincial Park	Huxley and Elnora		Year round	Provincial Park	English	Provincial park , buffalo jump

EXHIBIT 3-2 – INVENTORY OF ATTRACTIONS

Product Name	Location	Annual Visitors	Season	Type of Attraction	Language	Other Tourism Products Offered
Edson Native Interpretive Trail	Edson	4,000	Spring/ Summer/ Fall	Interpretative attraction - Manmade, Interpretive guide company	English	Interpretive guided tours, accommodation, food, self guided tours, group tours, souvenirs, hands on instruction and education of native cultural elements, crafts, historical / tipi ring, sporting activities, native games for school kids, round dances, traditional dancers
Eleske Shrine annual pilgrimage	High Level	200	Summer	Religious Pilgrimage	English / Native	Historical religious ceremony
Fort Chipewyan Bicentennial Museum	Fort Chipewyan	33,900	Year round	Museum	English / Native	Group tours, souvenirs, hands on instruction and education of native cultural elements, interpretive guided tours, crafts, museum
Fort Museum	Fort Macleod	50000	Spring / Summer / Fall	Museum	English	
Fort Vermilion Heritage Centre (Museum & Archves)	Fort Vermilion		Summer	Museum		Aboriginal agricultural & historic attraction
Fort Whoop-up Interpretive Centre	Lethbridge	29,000	Year round	Interpretative attraction - Manmade, Native cultural education company	English / Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, interpretive guided tours, historical / tipi ring
Gilbertson Buffalo Paddock	Amisk			Buffalo Viewing		
Glenbow Museum	Calgary	10,000	Year round	Museum	English/French /Native	Museum
Grouard Native Cultural Arts Museum	Grouard	3,000	Year round	Museum	English/French /Native	Museum
Head Smashed In Gift Shop (Prairie Rose Crafts Ltd.)	Standoff	100,000	Year round	Interpretative attraction - Manmade, Interpretive guide company, Native cultural education company, Souvenir shop, Craft Shop, Gift Shop	English / Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, souvenirs, interpretive guided tours, crafts, historical / tipi ring, sporting activities
Head-Smashed in Buffalo Jump and Museum	Fort Macleod	100000	Year round	Museum	English / Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, souvenirs, interpretive guided tours, crafts, historical / tipi ring, sporting activities
Head-Smashed –In Buffalo Jump Interpretive Centre	Fort Macleod	100000	Year round	Interpretive attraction - manmade	English / Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, souvenirs, interpretive guided tours, crafts, historical / tipi ring, sporting activities
Indian Sundance Trees	Bighorn		Year round	Aboriginal Attraction		
Kinsoo Totem Poles	Cold Lake		Year round	Totem Poles		Totem poles
Kootenay Place	Glenevis		Year round	Aboriginal Wildlife & Nature		Wildlife & nature
Medicine Hat Museum and Art Gallery	Medicine Hat	18000	Year round		English	Museum
Museé Heritage Museum	St. Albert	16000	Year round	Museum	English / French	Museum, hands on instruction and education of native cultural elements
Native Cultural Arts Museum	Grouard	Grouard		Year round	Museum	
Ninastako Cultural Centre	Standoff	5,000	Year round	Museum, Culture Centre	English/Native	Hands on instruction and education of native cultural elements, group tours, souvenirs, crafts

Exhibit 3-2 – Inventory of Attractions						
Product Name	**Location**	**Annual Visitors**	**Season**	**Type of Attraction**	**Language**	**Other Tourism Products Offered**
Oldman River Cultural Centre	Brocket	11,000	Year round	Interpretive guide company, Native cultural education company, Craft Shop, Culture Centre	English/Native	Self guided tours, group tours, souvenirs, hands on instruction and education of native cultural elements, interpretive guided tours, crafts, historical / tipi ring, interpretive culture craft shop, cross culture programs, cultural
Piikani Lodge Interpretive Centre & Gift Shop	Brocket	10,000	Year round	Interpretive guide company, Native cultural education company, Craft Shop, Culture Centre	English/Native	Self guided tours, group tours, souvenirs, hands on instruction and education of native cultural elements, interpretive guided tours, crafts, interpretive culture craft shop, cross culture programs, cultural
Provincial Museum of Alberta	Edmonton		Year round	Museum	English	Syncrude Canada Aboriginal Peoples Gallery
Saamis Tipi	Medicine Hat	35,000	Spring/ Summer/ Fall	Interpretive guide company, Native cultural education company, Archaeological Site, Native historical site	English	Hands on instruction and education of native cultural elements, group tours, souvenirs, interpretive guided tours, crafts, historical / tipi ring
Saddle Lake Cultural Museum	Slave Lake			Museum		
Siksika Cultural Centre	Siksika	25,000	Year round	Cultural centre	English/Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, souvenirs, interpretive guided tours
Siksika Nation Interpretive Centre	Siksika	30,000	Summer/ Fall	Interpretative attraction - Manmade	English/Native	Hands on instruction and education of native cultural elements, souvenirs, crafts, historical / tipi ring
Siksika Nation Museum	Siksika	25,000	Year round	Museum	English/Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, interpretive guided tours
Slave Lake Native Friendship Centre	Slave Lake	40000	Year round	Friendship Centre	English	Museum, group tours
Statue of John Hunter	Calgary		Year round	Aboriginal, Architecture & Historic Attraction		Historic statue
Tsuu T'ina Culture Museum	Calgary		Year round	Museum	English/native	Interpretive guided tours, crafts
Waterton Lakes National Park	Waterton Park	420,000	Year round	National Park, Interpretative attraction - Manmade, Interpretive guide company	English/French	Accommodation, food, self guided tours, group tours, souvenirs, hands on instruction and education of native cultural elements, interpretive guided tours, crafts, historical / tipi ring, heritage appreciation
Wetaskiwin & District Museum	Wetaskiwin	1,600	Year round	Museum	English/French	Self guided tours, group tours, hands on instruction and education of native cultural elements, cultural elements, history

Other Aboriginal Tourism Attractions That Were Not Reached For An Interview

Product Name	Location	Product Name	Location	Product Name	Location	Product Name	Location
Buffalo Nations Luxton Museum	Banff	High Prairie & District Museum and Historical Society	High Prairie	Nose Creek Valley Museum	Airdrie	Rocky Mountain House National Historic Site of Canada	Rocky Mountain House
Cypress Hills Interprovincial Park	Elkwater	Mural of a Buffalo Jump	High River	Poundmaker Trail	Viking	The Saucy Buffalo Art Gallery	Okotoks
Empress Buffalo Jump and Tipi Rings	Empress	Native Cultural Arts Museum & Collection	Lac La Biche	Ribstones	Viking	Writing on Stone Provincial Park	Milk River
Girouxville Museum	Girouxville						

Festivals, Events, Powwows, Conferences

When it comes to festivals, events and powwows, aboriginal culture travellers have a wide variety from which to choose. In all, there are 32 different aboriginal tourism events held throughout Alberta (see **Exhibit 3-3**). The sector offers a broad range of opportunities to learn about and experience aboriginal culture first-hand. Some of the more common experiences available to tourists include hands-on instruction and education of native cultural elements, historical, tipi rings, religious ceremonies, traditional dances and customs and crafts.

The inventory points to potential opportunities to offer off and shoulder season events as most events currently offered are in summer.

EXHIBIT 3-3 – INVENTORY OF FESTIVALS AND EVENTS

Product Name	Location	Annual Visitors	Season	Type of Event	Language	Other Tourism Products Offered
Alexander First Nation Traditional Powwow	Alexander First Nation	440	Summer	Powwow/festival	English/ Native	Historical / tipi ring, traditional ceremonies
Beaver Lake First Nation Annual Powwow	Lac La Biche	6,000	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, food, sporting activities, hand games, dancers, pipe ceremony, religious ceremony
Buffalo Days, Head Smashed In Buffalo Jump	Fort Macleod	100,000	Year round	Interpretative attraction Manmade, Interpretive guide company, Native cultural education company	English/ Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, souvenirs, interpretive guided tours, crafts, historical / tipi ring, sporting activities
Buffalo Lake Metis Settlement Annual Rodeo	Caslan	N/A		Powwow/festival		
Calgary Native Friendship Society Millennium Powwow	Calgary	8,000	Spring	Powwow/festival	English	Native celebration, dancing competition, drumming competition, memorial ceremonies
Calgary Exhibition & Stampede-Indian Village	Calgary		Summer	Tipi village, interpretive programs	English / Native	Guided group or individual interpretive tours, storytelling, games, singing, dancing
Celebration Days	Goodfish Lake	9,000	Summer	Powwow/festival	English	Sporting activities, traditional sports, rodeo, ball tournament, talent shows, nightly dances
Enoch Competition Powwow	Enoch	5,000	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, food, crafts
Ermineskin Annual Powwow	Hobbema	N/A	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, souvenirs, crafts, historical / tipi ring
Fort McKay First Nation Treaty Days	Fort McMmurray	200	Summer	Powwow/festival	English/ Native	Festival celebration, celebration of treaty signing, card games, drummers, bingo
Gathering of Nations	Bragg Creek			Powwow/festival		
Kainai Indian Days Summer Powwow & Rodeo	Standoff	5,000	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, sporting activities, other, hand game, golf, rodeo, softball
Kehewin Cree Nation Powwow	Kehewin First Nation	4,500	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, souvenirs, crafts, historical / tipi ring, sporting activities
Metis Week	Edmonton	1,400	Fall	Native cultural education company, Powwow/ festival	English/ Native	Hands on instruction and education of native cultural elements, historical / tipi ring, musical, re enactments

Exhibit 3-3 – Inventory of Festivals and Events						
Product Name	**Location**	**Annual Visitors**	**Season**	**Type of Event**	**Language**	**Other Tourism Products Offered**
Nakoda Nation Annual Powwow & Rodeo	Morley	N/A	Summer	Powwow/festival, Cultural Centre, Guided tours, Traditional Dance, Conventions	English/ Native	Hands on instruction and education of native cultural elements, accommodation, food, self guided tours, group tours, souvenirs, interpretive guided tours, crafts, historical / tipi ring, sporting activities, archery, canoeing, cultural tourism
Napi Cross-Cultural Conference (friendship Centre) & P	Pincher Creek	7,500	Year round	Friendship Centre	English/ Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, souvenirs, crafts
Peace Park Powwow	Waterton Lake National Par	500	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, historical / tipi ring, powwow
Peigan Nation Annual Celebration Powwow	Brocket	8,500	Summer	Powwow/festival, Softball, Rodeo	English/ Native	Hands on instruction and education of native cultural elements, sporting activities
Saddle Lake Annual Powwow	Saddle Lake	5,000	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, accommodation, food, souvenirs, crafts, sporting activities, traditional hand game, native ball tournament, aboriginal golf tournament, traditional dance competition
Siksika Nation Awareness Week (cultural centre)	Siksika	N/A	Year round	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, interpretive guided tours, signing of treaty re-enactment
Siksika Nation Powwow & Fair	Siksika	3,000	Year round	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, self guided tours, group tours, interpretive guided tours, signing of treaty re-enactment
Tsuu T'ina Nation Annual Powwow & Rodeo	Tsuu T'ina	3,000	Summer	Powwow/festival	English/ Native	Hands on instruction and education of native cultural elements, food, aboriginal business networking, aboriginal social networking

Other Aboriginal Tourism Festivals/Events That Were Not Reached For An Interview

Product Name	Location	Product Name	Location	Product Name	Location	Product Name	Location
Alexis Competition Powwow	Alexis First Nation	Driftpile Annual Powwow	Driftpile	International Native Arts Festival	Calgary	Poundmaker Nechi Powwow	St. Albert
Dene Gathering	Cold Lake First Nation	Heart Lake First Nation Powwow	Lac La Biche	Native Awareness Week	Calgary	World Indigenous Peoples Conference On Education	Morley
Dreamspeakers Festival	Edmonton	Indian Days and Powwow	Standoff				

Food & Beverage

As seen with accommodations, the supply of aboriginal themed restaurants in Alberta is limited (three establishments). Again, this does not necessarily indicate a shortage of food and beverage establishments to support the industry as there are plenty of non-aboriginal themed food and beverage establishments throughout the province. However, it may again point to an opportunity to be exploited by offering more themed restaurants. The supply of aboriginal themed food and beverage establishments in Alberta is summarized in **Exhibit 3-4.**

Exhibit 3-4 – Inventory of Food & Beverage						
Product Name	**Location**	**Annual Visitors**	**Season**	**Type of Restaurant**	**Language**	**Other Tourism Products Offered**
Chief Chiniki Restaurant	Morley	18,250	Year round	Family dining restaurant	English/Native	Food, souvenirs, crafts
Standoff Restaurant	Standoff	82,000	Year round	Fast food restaurant	English/Native	Food
Starlight Catering	Calgary		Year round	Caterer	English/Native	Food, singing and dancing

Tour Operators, Adventure Tourism & Recreation

As seen in **Exhibit 3-5**, the inventory search revealed 11 different tour operators in Alberta focused on aboriginal tourism. Only three of these were reached for an interview. While the available information is limited, the results indicate that there is a strong focus on interpretive tours. Some opportunities may exist in packaging interpretive tours with other products such as adventure tourism or eco-tourism.

Exhibit 3-5 – Inventory of Tour Operators						
Product Name	**Location**	**Annual Visitors**	**Season**	**Type of Operator**	**Language**	**Other Tourism Products Offered**
Athabasca Delta Interpretive Tours	Fort Chipewyan	100	Summer/ Fall	Interpretive guide company	English	Interpretive guided tours, hands on instruction and education of native cultural elements, living like ancient people
Eaglestar Tours	Calgary	1,500	Year round	Interpretive guide company	English/ German	Interpretive guided tours
iinoohk 'sookoo, (Path of the Buffalo)	Black Diamond		Year round	Interpretive guide company	English/Native	Tipi village, food storytelling
Nakoda Cultural Tours c/o Nakoda Lodge	Morley		Summer/fall	Interpretive guide company	English/Native	Dancing, singing, craft making, craft shop, storytelling
Night Singer Bed 'n Breakfast	Standoff		Summer/fall	Tipi camping and educational programs	English/Native	Hiking, canoeing, rafting
Spotted Elk Camps	Calgary		Summer / Fall	Tipi camping and interpretive programs	English/native	Storytelling, interpretive programs
Ultimate Playtime Holistic Adventures	Canmore	60	Year round	Interpretive attraction - Natural, Interpretive guide company	English/ French/ German	Interpretive guided tours, self guided tours, group tours
Yethka Getaways	Morley		Year round	Tipi camping and RV campground	English/native	
Alberta Adventure Tours International Inc	Canmore	Not Contacted For Interview				
Okan Guided River Excursions	Calgary					
Okan Trail Rides	Siksika					

Tourism Services

Tourism services include tourism support businesses such as craft shops and souvenir shops. While the supply of aboriginal tourism services seems limited from **Exhibit 3-6**, it is important to note that many of the attractions and events have supporting tourism services included within their organization.

Exhibit 3-6 – Inventory of Tourism Services						
Product Name	**Location**	**Annual Visitors**	**Season**	**Type of Service**	**Language**	**Other Tourism Products Offered**
Cree Impressions	Granum	400	Summer	Craft shop	English	Crafts
Rocky Barstad, Two Feathers Gallery	High River	3,000	Year round	N/A	English	Crafts, artwork, artwork, sculpture, paintings, carvings, traditional weapons, prints, wood, bone, stone, bead quill work, carvings, bags, jewellery, music, books, walking talking and dancing sticks
White Eagle Native Crafts	Calgary	800	Year round	Craft Shop	English	Crafts, clothing (traditional)
Banff Indian Trading Post	Banff					
Ermineskin Garments and Crafts	Hobbema	Not Contacted For Interview				

Geographic Distribution of Aboriginal Tourism Businesses

Exhibits 3-7a and **3-7b** on the next pages illustrates the geographic distribution of the aboriginal tourism industry inventory in Alberta. A reference table has been provided in **Exhibit 3-8** so users can identify which sites are which.

As seen in **Exhibit 3-7**, the industry is very concentrated in the southern regions of the province, particularly around Calgary. There is also a high concentration of sites around Edmonton.

It should be noted that the sites have been plotted based on postal code. In situations where a postal code was not available, one was obtained for the nearest town. For sites with different mailing and operating addresses, it is the postal code for the mailing address that was used. The map is not intended to pinpoint the exact location of tourism businesses, but rather is designed to provide a general overview of the distribution of the industry.

EXHIBIT 3-7A – GEOGRAPHIC DISTRIBUTION OF ALBERTA ABORIGINAL TOURISM

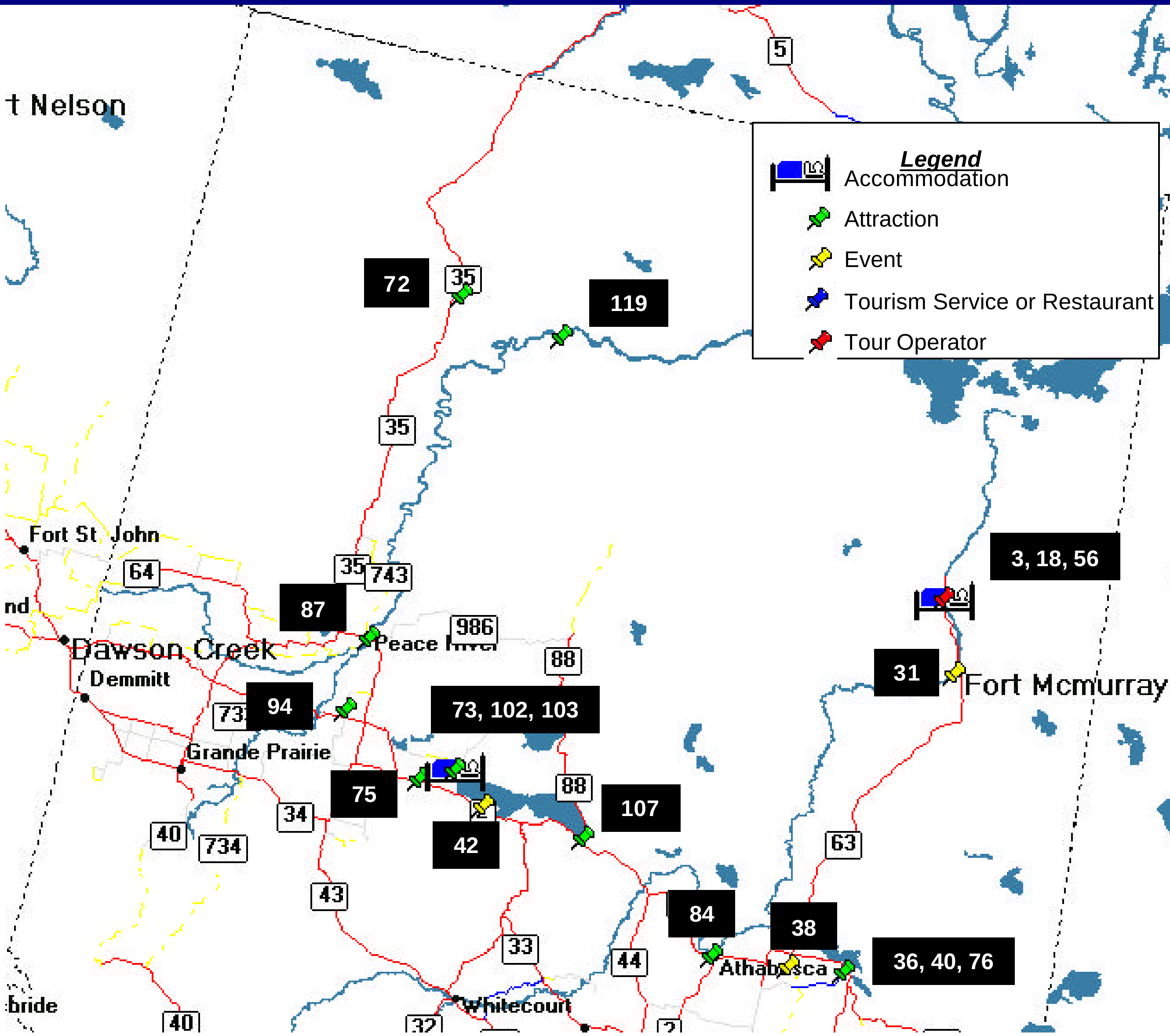

EXHIBIT 3-7B – GEOGRAPHIC DISTRIBUTION OF ALBERTA ABORIGINAL TOURISM

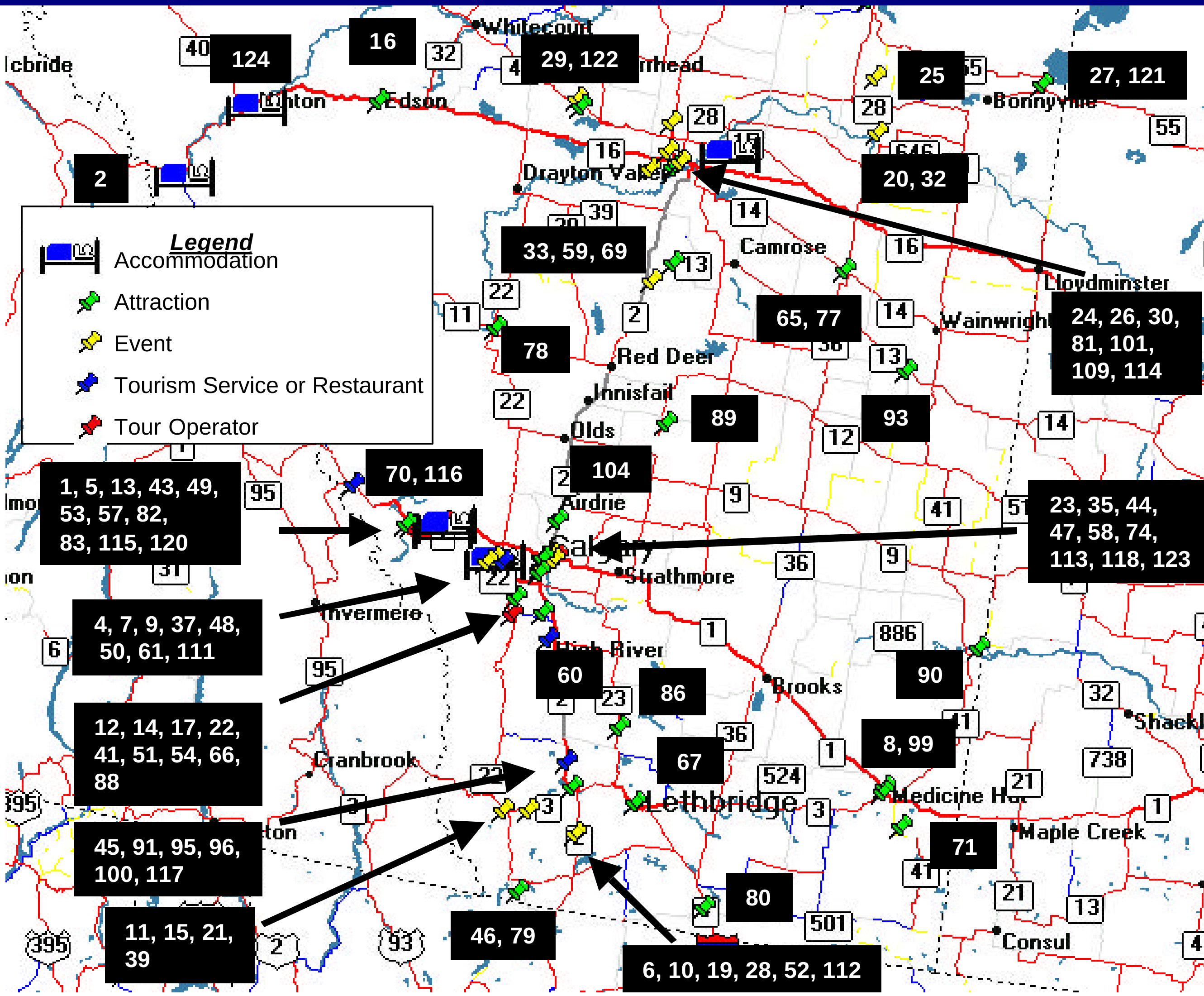

EXHIBIT 3-8 – ABORIGINAL TOURISM SITE REFERENCE LIST							
1	Nakoda Lodge & Conference Centre	29	Alexis Competition Powwow	58	Okan Guided River Excursions	91	Fort Museum
2	Sawridge Hotel & Conference Centre	30	Alexander First Nation Traditional Powwow	59	Ermineskin Garments and Crafts	93	Gilbertson Buffalo Paddock
3	Fort Chipewyan Adventure Lodge	31	Fort McKay First Nation Treaty Days	60	Rocky Barstad, Two Feathers Gallery	94	Girouxville Museum
4	Eagle Bed & Breakfast	32	Saddle Lake Annual Powwow	61	White Eagle Native Crafts	95	Head-Smashed –In Buffalo Jump Interpretive Centre
5	Chief Chiniki Restaurant	33	Ermineskin Annual Powwow	65	Poundmaker Trail	96	Head-Smashed in Buffalo Jump and Museum
6	Standoff Restaurant	34	Kehewin Cree Nation Powwow	66	The Saucy Buffalo Art Gallery	99	Medicine Hat Museum and Art Gallery
7	Starlight Catering	35	Calgary Exhibition & Stampede-Indian Village	67	Fort Whoop-up Interpretive Centre	100	Mural of a Buffalo Jump
8	Saamis Tipi	36	Heart Lake First Nation Powwow	69	Wetaskiwin & District Museum	101	Museé Heritage Museum
9	Tsuu T'ina People's Museum	37	Tsuu T'ina Nation Annual Powwow & Rodeo	70	Buffalo Nations Luxton Museum	102	Narrows Cultural Resort
10	Ninastako Cultural Centre	38	Buffalo Lake Metis Settlement Annual Rodeo	71	Cypress Hills Interprovincial Park	103	Native Cultural Arts Museum
11	Oldman River Cultural Centre	39	Peigan Nation Annual Celebration Powwow & R	72	Eleske Shrine annual pilgrimage	104	Nose Creek Valley Museum
12	Siksika Nation Interpretive Centre	40	Beaver Lake First Nation Annual Powwow	73	Grouard Native Cultural Arts Museum	106	Provincial Museum of Alberta
13	Chiniki Restaurant & Handicraft Centre	41	Siksika Nation Powwow & Fair	74	Glenbow Museum	107	Slave Lake Native Friendship Centre
14	Siksika Nation Museum	42	Driftpile Annual Powwow	75	High Prairie & District Museum and Hist. Soc.	109	Dreamspeakers Festival
15	Piikani Lodge Interpretive Centre & Gift Shop	43	Nakoda Nation Annual Powwow & Rodeo	76	Native Cultural Arts Museum & Collection	111	Gathering of Nations
16	Edson Native Interpretive Trail	44	World Indigenous Peoples Conference On Educaction	77	Ribstones	112	Indian Days and Powwow
17	Siksika Cultural Centre	45	Buffalo Days, Head Smashed In Buffalo Jump	78	Rocky Mountain House National Historic Site	113	International Native Arts Festival
18	Fort Chipewyan Bicentennial Museum	46	Peace Park Powwow	79	Waterton Lakes National Park	114	Poundmaker Nechi Powwow
19	Head Smashed In Gift Shop (located at HSIBJ)	47	Calgary Native Friendship Society Millenium Powwow	80	Writing on Stone Provincial Park	115	Alberta Adventure Tours
20	Saddle Lake Cultural Museum	48	Eaglestar Tours	81	Elk Island Retreat	116	Banff Indian Trading Post
21	Napi Cross-Cultural Conference (friendship Centre) & Powwow	49	Yethka Getaways	82	Stoney Indian Park	117	Cree Impressions
22	Siksika Nation Awareness Week (cultural centre)	50	Spotted Elk Camps	83	Sundance Lodges	118	Blackfoot Gallery
23	Native Awareness Week	51	Okan Trail Rides	84	Athabasca Native Friendship Centre	119	Fort Vermilion Heritage Centre
24	Metis Week	52	Night Singer Bed 'n Breakfast	86	Carmangay	120	Indian Sundance Trees
25	Celebration Days	53	Ultimate Playtime Holistic Adventures	87	Centennial Museum and Archives	121	Kinsoo Totem Poles
26	Enoch Competition Powwow	54	iinoohk 'sookoo, (Path of the Buffalo)	88	Chief Crowfoot Monument	122	Kootenay Place
27	Dene Gathering	56	Athabasca Delta Interpretive Tours	89	Dry Island Buffalo Jump Provincial Park	123	Statue of John Hunter
28	Kainai Indian Days Summer Powwow & Rodeo	57	Nakoda Cultural Tours c/o Nakoda Lodge	90	Empress Buffalo Jump and Tipi Rings	124	Rock Lake Lodge

Infrastructure Analysis

As part of an overall tourism opportunity analysis, it is important to review and assess the infrastructure that is in place to support tourism operations. Tourism infrastructure is critical in terms of assisting operators with building awareness of their tourism products and providing clients with the necessary services and amenities that are required as part of their trip.

An assessment of both the hard tourism infrastructure – roads, accommodations and retail services – and the soft tourism infrastructure – visitor information centres and marketing organizations – has been undertaken to provide a complete picture of Alberta's readiness for increased aboriginal tourism activity. A general review of infrastructure and services throughout the province and information from the aboriginal tourism business survey as well as a series of on-site visits to specific attractions provided the foundation for this analysis.

From a tourism perspective, Alberta is separated into six Tourism Destination Regions (TDR), which are the basic units of classification for tourism marketing within the province. The six TDR's are:

- North
- Edmonton
- Central
- Calgary
- Rockies
- South

Each of the key infrastructure components are discussed below. The review revealed few differences between the TDR's with respect to major infrastructure issues. Therefore, the majority of the infrastructure review is presented at the provincial level. The few issues that exist at the TDR level are noted as such where presented.

Access

Transportation throughout the province is typically either by road or air. Alberta has spent considerable dollars over the past few years upgrading and enhancing major transportation corridors, primarily for the shipment of cross-border products and the facilitation of northern oil sands development. The aboriginal tourism industry is able to take advantage of the high quality road and highway network throughout Alberta.

Most of the TDR's have excellent highway and road coverage on either major trans-provincial highways or major Alberta highways. However, due to the nature of northern Alberta, there is limited road access to areas other than the major communities of Fort McMurray, Peace River and Grande Prairie. The geography of the North TDR, predominantly lakes, makes it difficult to develop roads in that region.

Overall, the road infrastructure in Alberta is well developed to service aboriginal tourism operators with the possible exception of operators within more remote locations of the North TDR.

With both Edmonton International and Calgary International providing inbound and outbound air service to domestic and international locations, there is sufficient air service to both major and smaller destinations. While only a small number of US and international locations have direct service to these two airports, with continued growth of Alberta's economy and exposure, new routes will likely develop to service new demand. In the meantime, there is a reliance on connector routes.

Smaller regional airports in Peace River, Grande Prairie, Fort McMurray, Lethbridge and Medicine Hat also provide domestic access and are departure points for smaller and more remote locations throughout Alberta. The air access and infrastructure in Alberta meets the current needs of aboriginal tourism operators.

Accommodations

When reviewing provincial accommodations, some TDR's or communities displayed shortages at peak times. However, this is common in tourism as there needs to be a balance in supply between peak season and off-season. As such, no industry-threatening accommodation shortages were identified.

Many of the major communities in Alberta, and those located on or near major transportation corridors, have seen tremendous accommodation development over the past few years to support a growing tourism industry and increased travel to Alberta's communities.

The Rockies TDR has significant peak periods, especially during the summer months. Hotel accommodations may be difficult to acquire at the last minute. Those booking in advance, however, should face little problem in securing accommodations.

Due to the nature of the oil and gas, and forestry activity in northern Alberta, there are times when accommodations are difficult to find in the North TDR, particularly in Fort McMurray and Grande Prairie. The transient nature of the oil sands employment and frequent business trips to the region put a strain on hotel accommodations, particularly in the winter months.

The North TDR office has indicated that hotel shortages do occur in the winter months, however those booking well in advance should have no problems. Summer hotel availability is typically not an issue, as oil and gas activity slows over the summer months while tourism activity increases. New hotels are currently being built in Fort McMurray and Grande Prairie to alleviate the pressure. Overall, the hotel situation in the North TDR should not impact aboriginal tourism operators given the complementary timing differences in demand between business and tourism activity.

Other TDR's such as Calgary, Edmonton and the South, will from time to time face accommodation shortages at peak times and during special events such as the Calgary Stampede. These shortages however are not prolonged and do not impact the overall ability of a region to satisfy the accommodation needs of the aboriginal tourism industry.

Most of the aboriginal tourism operators interviewed indicated that, in general, there is sufficient accommodation infrastructure to support their businesses. Those that indicated insufficient accommodation infrastructure, were largely reserve based operations, or those in more remote locations. Accommodation shortages were specifically identified by operators based around the Stoney reserve, Standoff, Brocket, Hobbema and Goodfish Lake. While this may impact potential visitors from using these tourism operators, it is difficult to create large-scale reserve based hotel developments to support a small number of tourism operators.

Some accommodation shortages may occur during peak periods in the Rockies and North TDR's, as well as on reserves. However, these are not of sufficient magnitude to impact aboriginal tourism development.

Retail and Supporting Services

Retail and supporting services are not a major tourism infrastructure issue for aboriginal tourism in Alberta. Operators that indicated a shortage of retail and services to support their businesses were, as with the accommodations infrastructure, typically based on reserves or in remote locations. Supporting retail in these locations is often low due to the limited traffic and smaller market size of the area.

Visitor Information Centres / Convention and Visitor Bureaus / Marketing Organizations

Visitor Information Centres (VIC) and Convention and Visitor Bureaus (CVB) are important services established to assist visitors to a region and to increase the marketing activity of a group of tourism operators by combining their efforts and resources to achieve economies of scale. They are both important sources of exposure, and can vastly increase the amount of visibility that an operator receives.

Establishing a VIC is typically the responsibility of the TDR and local community, while the establishment of a CVB or marketing organization is the result of local operators uniting to form an organization to broaden and enhance their marketing and advertising activities.

The review has found that typically VIC's are established in major communities and those oriented towards tourism, such as Calgary, Edmonton, Banff and Lethbridge. They are also found in gateway communities in the province or near TDR boundaries. These adequately service the communities and regions that they are located in or near. Typically VIC's are significant operations, and too costly to establish in support of a smaller community or region.

Through the operator interviews, approximately 24% of the communities indicated that they did not have a VIC in their region. This lack of VIC's is most common in smaller communities and for those operators located on reserves. This is not an uncommon finding, due to the cost of establishing and operating a VIC.

With respect to CVB's or marketing organizations dedicated to aboriginal tourism, 31% of the operators interviewed indicated that they did not have a CVB in their region. Again, as with the VIC findings, most operators that did not have access to a CVB were in smaller communities or were reserve based. This is not surprising given the critical mass needed to make a CVB effective and efficient.

Only 43% of operators interviewed indicated that they worked in partnership with the Niitsitapi Tourism Society of Alberta, the only aboriginal focused tourism organization in Alberta. It operates similar to a CVB in that operators become members. Marketing and lead benefits are only provided to members. This is an extremely low number given that it is the only organization dedicated to serving the needs of Alberta's aboriginal tourism operators.

According to Niitsitapi, the low participation rate is likely a result of limited awareness of the organization and/or the level of annual fees. In order to assist more aboriginal tourism operators in the province, there needs to be an increase in awareness of Niitsitapi. Moreover, greater industry participation with Niitsitapi or a similar Alberta wide aboriginal tourism body could significantly benefit the industry. Operators need to remember that while they compete against each other in the local space, they need to present a united front to attract aboriginal tourism travellers to Alberta in general. Further discussion of Niitsitapi is included in the Challenges and Barriers section.

Additionally, only 17% of operators interviewed indicated that they take part in a partnered marketing program, with organizations such as Travel Alberta, the local TDR, other local tourism agencies or the CTC. It is important for operators without a VIC or CVB to utilize partnership opportunities to increase exposure and to open up new product and packaging opportunities. Efforts should be made to significantly increase awareness of (and ultimately participation in) the marketing partnerships available to aboriginal tourism operators.

In summary, the VIC and CVB's established are adequately serving larger, tourism oriented and gateway communities. However, those operators in smaller communities and those based on reserves do not have (or don't feel they have) access to a VIC or a CVB. To the extent that they are available, partnership opportunities need to be marketed to this group. Additionally, actions should be taken to increase awareness of and participation in Niitsitapi or a similar Alberta wide aboriginal tourism body and to increase participation in tourism related partnerships throughout the province. By joining forces to present a united front, the whole industry stands to benefit.

Technology

Virtually all of the tourism operators interviewed indicated that they have access to, and utilize, new technologies, such as e-mail and the Internet. Moreover, approximately 40% of operators interviewed indicated that they have and maintain a web site for their tourism business. A further 30% indicated that they advertise their tourism business on another web site, not maintained by them, for a total of 70% of aboriginal tourism business having a presence of the Internet. This is indicative of the growing importance of the web as a means of advertising. Given the increasing use of the Internet as a means of gathering information and booking travel by key target markets (as indicated in the TAMS study), this trend bodes well for the industry.

Current and future communications technology will vastly enhance the transfer and dissemination of knowledge and information to those who can use it most effectively. Given the widespread access to communications technology determined from the operator interviews, some form of market information sharing and education options using Internet and e-mail could be established. This can help to share information on market conditions, trends, and opportunities and also provide on-line educational programs to assist with new and small business operators.

Summary of Infrastructure

With respect to Alberta's tourism infrastructure to support aboriginal tourism:

- Road and air access to and within Alberta is strong and is well established to support aboriginal tourism in Alberta;
- Accommodations are not a significant issue, with the exception of the Rockies and North TDR's in peak periods, and near reserve-based operations;
- There are sufficient retail and services throughout Alberta to support aboriginal tourism;
- The VIC and CVB's are well established in larger communities and those devoted to tourism. Smaller communities, and those based on or around reserves, are typically lacking these types of structures and organizations. For those smaller communities and reserves with significant tourism operations, efforts should be made to establish local based VIC's or CVB's. Additionally, participation in partnership marketing programs and Niitsitapi are below a level at which their full benefits can be realized; and,
- A high percentage of aboriginal tourism operators utilize new technologies and either maintain their own web site or have their product marketed on another web site.

Challenges and Barriers

While the aboriginal tourism industry in Alberta does not face major infrastructure issues, there are a number of challenges and barriers to the development of aboriginal tourism that exist. Barriers exist at both the global level and the individual operator level.

The challenge and barrier review was completed through on-site visits and interviews with selected aboriginal tourism operators during October 2001, and through questions on the operator survey regarding major challenges. Through this process, three major categories of challenges and barriers were identified — policy and regulatory, operational and social. Each of these is discussed below, with a general introduction followed by specific details on the elements of each category.

Policy and Regulatory

Policies and regulations are typically established by government, and are meant to protect and preserve the general social, environmental and economic interests of the nation in a manner consistent with a civilized society.

While policies and regulations impact everyone on a day-to-day basis, most do not pose any major issues for aboriginal tourism. There are however, two key policy/regulatory areas that pose challenges and barriers to the growth and success of aboriginal tourism in Alberta. Specifically, the policies and regulations of concern are those with respect to operating within parks, and signage.

Operation Policies in Parks

- Operators that use national or provincial parks as a location for their product and programs indicated that there is an increasing level of restriction being placed on them by park authorities in terms of the locations they are able to use, trail access and restricting re-enactment activities within the parks. These restrictions are limiting the authenticity and wilderness experience that clients seek from aboriginal tourism outfitters.

  While these are important issues in the operation of aboriginal tourism businesses, protecting park resources is also important. After all, if the parks are destroyed, these operators will not have a product to sell. There must be a balance struck between access and protection within the parks. Operators need to work with parks to find a balance that benefits both parties.

- Some operators mentioned that they face challenges in securing permits to take clients into park areas, while large foreign groups either proceed without permits or are granted them without the restrictions faced by the local operators.

  Efforts at a policy and regulatory level should be made to ensure that all guides are certified, are Mountain Parks Interpretive Society accredited and are educated and trained on low impact activity and protected area preservation. Rules must be applied consistently and fairly to all.

Signage

- For some facility or attraction based tourism operators, there appears to be a lack of signage indicating the location of their attraction. These operators expressed a desire to work with the province, Travel Alberta and/or their local TDR to increase signage of their attraction along major transportation routes.
- Some reserve-based operators noted that federal government signs at the entrances of reserves are a significant deterrent to tourism clients. Large signs, posted by the federal government, state that people are entering a reserve and that there is "No Trespassing." Efforts could be made to create partnerships with the federal government and the band councils to develop gateways, and increase welcoming signage for reserves that host a number of tourism businesses. Operators felt they would be better served by posting their own signage.

Operational

Operational barriers are typically those that have been identified as issues by the tourism operators in either successfully starting a tourism business, or finding the necessary resources to keep an existing business successful.

The operational challenges and barriers that have been identified include funding, marketing and advertising, and the education and training of the labour force.

Funding

- A lack of funding, or challenges accessing funding, was the most frequently cited challenge and barrier to aboriginal tourism development.
- The majority of operators indicated that they lack the equity to fully establish themselves as a major tourism operation and survive the start-up phase of a new business.
- Operators indicated that financing is difficult to secure as an aboriginal person due to potentially limited credit histories and financial resources.
- Operators that had received Aboriginal Business Canada funding indicated that it is extremely slow in being issued, and that the timeliness of funding can impact a new business' opportunities, particularly for seasonal operations.
- Few of the respondents interviewed were aware of the potential funding sources available. Funding options need to be better promoted.

Marketing and Advertising

- There is a lack of strong and coordinated marketing efforts for aboriginal tourism in Alberta.
- There is a sentiment amongst operators that there is a lack of awareness of Alberta aboriginal tourism products in the market.
- A large number of aboriginal tourism operators indicated that they feel a barrier to development of the industry is a lack of marketing and promotions. Their resources to advertise and promote are limited. They expressed a desire to increase marketing of aboriginal tourism at a provincial level – through Travel Alberta – or utilizing Niitsitapi more efficiently to coordinate better marketing activities.
- Niitsitapi exists in large part to market and advertise aboriginal tourism, however, it appears to be severely restricted in what it is able to accomplish due to a lack of resources. The intent of the organization is excellent, however, it needs more support. Participation by aboriginal tourism operators is only 43% of those interviewed. As such, its marketing efforts are limited in scope and impact.
- Better provincial coverage is needed to enhance awareness of aboriginal tourism in the province, increase communication of the tourism products, and share ideas and to coordinate marketing efforts.

- A new structure for Niitsitapi or similar Alberta wide aboriginal tourism body could be as a provincial organization undertaking domestic and international marketing, and supporting smaller TDR-based or reserve-based marketing and coordinating bodies that feed into Niitsitapi or similar Alberta wide aboriginal tourism body.
- Strong local and TDR based coordinators and champions would be needed. A very focused strategic plan should be created to guide efforts in a more coordinated manner.
- Aboriginal tourism operators indicated a desire to enhance packaging efforts of aboriginal tourism products. A successful packaging program is the result of understanding market demands, available products, and, subsequently marketing appropriately. This could be coordinated through the new Niitsitapi structure or similar Alberta wide aboriginal tourism body outlined above.

Education and Training of Labour Force

- Slightly less than half of the respondents indicated that human resources are a challenge in successfully operating their business.
- Of those with human resource issues, a lack of qualified people in their area was the most predominant issue.
- A lack of available, aboriginal-based tourism training was also mentioned as a major human resource issue. These types of programs would assist and educate operators on the tourism industry, and train those interested in working for a tourism operator, in gaining knowledge of the industry.
- In order to address these issues, efforts should be made to increase education and training on issues such as tourism based and small business management, and service in the tourism industry. This would increase the capacities of operators and staff. One training avenue open to operators is the Canadian Tourism Human Resource Council (CTHRC), which offers several training programs in the area of tourism.
- Tourism market information, specifically tailored to aboriginal tourism, should be collected and disseminated to aboriginal tourism operators in order to keep abreast of their industry, and assist them in decision making on their product, level of development, pricing, etc.
- Other issues that were identified include the image of tourism as a low paying and low opportunity industry, and the low reliability and drive of employees.

Social

During the interviews and site visits, certain social challenges and barriers were raised that are impacting the development of aboriginal tourism products in the province. These are specifically internal band issues and general attitudes regarding aboriginals and non-aboriginals.

Internal Issues

- Band politics and interests often interfere with the successful operation of a tourism business.
- Some bands do not realize the importance of aboriginal tourism for economic development and the opportunities that exist with well-run aboriginal tourism operations.
- Some bands face significant wellness issues on the reserve, which can impact upon the reliability and quality of tourism staff.
- There is a shrinking interest amongst the younger generations in tourism and operating museums.

Attitudes

- Some operators feel that there is a stigma attached to operating an aboriginal tourism business.
- Operators indicated that steps should be taken to improve the relationship between aboriginals and non-aboriginals. There is still a history of stereotypes that needs to be addressed, and a better understanding and acceptance of each other's cultures is needed.
- There is a need to create a positive image and attitude towards aboriginal peoples.
- Many aboriginal operators are concerned with the running of "aboriginal tourism" businesses by non-aboriginals, particularly with the arts and crafts. Many expressed concern over the lack of authenticity, and the subsequent impact on their culture that comes with the imitation of their products.

Summary of Challenges and Barriers

While the number and magnitude of the barriers that each operator faces will differ depending upon their situation, it is obvious from the research and interviews that the large majority of operators face at least some of these challenges. The challenges faced by the aboriginal tourism industry result in a general lack of product development and readiness. Niitsitapi has indicated that it feels the markets for aboriginal tourism are there, but agrees that there is a lack of product development and readiness.

Overall, the lack of product readiness is a result of the challenges and barriers, specifically:

- Limited funding and access to capital;
- Limited awareness, and adequate marketing, of the aboriginal tourism industry in Alberta;
- Limited experience and training in tourism business management – capacity for business management and operations;
- Limited understanding of the market for aboriginal tourism; and,

- Social issues.

Because of the low product readiness, some operators indicated that it is difficult to deliver a consistent product, and to gain credibility in the market. Additionally, with low product development, quality of product can be an issue, and may damage reputations in the market, affecting future business.

In order for the aboriginal tourism industry to fully establish itself, become known in the domestic and global marketplaces and grow as a strong segment in Alberta, these challenges and barriers need to be addressed, at their appropriate levels. This should be done in partnership with operators, an Alberta wide aboriginal tourism body, the Province, and other key stakeholders such as Aboriginal Tourism Team Canada.

4. Product Opportunities

The previous two chapters presented an analysis of both the demand and supply of aboriginal culture tourism product in Alberta. In this chapter, the two analyses are combined to identify product gaps and ultimately product opportunities. The chapter begins with a look at how well the current product matches demand in each of the geographic markets. This is followed by a brief overview of potential product opportunities arising from the product market match. The chapter concludes with an assessment of the ability of the existing infrastructure to support the Provincial aboriginal tourism product offering.

Product Market Match

The following two market segments were identified as being good opportunities for the Alberta Aboriginal Tourism Industry to pursue:

- Aboriginal Culture Segment
- Culture Segment

These segments are defined by motivations and recent trip activities that include elements of aboriginal culture or general culture. Further to this segmentation, the market was also divided into three geographic regions:

- Short-Haul Market (Alberta, BC, Saskatchewan, NWT/Nunavut, Yukon and Montana)
- North American Long-Haul Market (Other Canada and US)
- Long-Haul Overseas Market (UK, Germany, Switzerland, France, Netherlands, Italy, Australia and Asia Pacific).

For more in-depth information on these segments, refer to *Chapter 2*. This section looks at how the aboriginal tourism products offered in Alberta match up with the needs of the various target segments. **Exhibit 4-1** below summarizes the results of the product/market match.

EXHIBIT 4-1 – PRODUCT MARKET MATCH ANALYSIS					
Products in Demand	**Markets Interested**				**Rating of Alberta's Aboriginal Product** (Use a 1-5 scale, where 5 means "completely met" and 1 indicates " no products")[1]
	Short Haul	**Long Haul Canada**	**Long Haul United States**	**Overseas**	
Arts and crafts shopping			✓		3.2
Authentic products	✓	✓	✓	✓	2.5
Camping	✓	✓	✓		2.3
Canoeing/kayaking	✓	✓	✓		1.8
Casinos/gambling			✓		1.0
Combination packages with a variety of things to do and see				✓	1.4
Dog sledding	✓	✓	✓	✓	1.8
Drive-in wilderness lodges	✓	✓	✓		2.2
Experiencing local foods				✓	2.0
Fishing	✓	✓	✓		3.0
Getting in touch with nature	✓	✓	✓	✓	2.4
Hands-on learning experiences		✓	✓	✓	2.2
Hiking/backpacking	✓	✓	✓	✓	2.6
Hunting/trapping			✓		2.2
Local arts and crafts				✓	2.9
Local festivals and events/ethnic festivals	✓	✓	✓	✓	3.7
Meet unique indigenous people				✓	2.0
Museums/interpretative centres/art galleries	✓	✓	✓		3.5
National parks & forests				✓	4.0
Native dances	✓	✓	✓		3.5
Opportunities to learn about native culture or different cultures		✓	✓	✓	2.6
Places of archaeological interest				✓	3.2
Places of religious significance				✓	2.2
Powwow's/aboriginal celebrations	✓	✓	✓	✓	3.3
Remote fly-in lodge			✓		2.2
Remote setting			✓		2.4
Snowshoeing	✓	✓	✓	✓	2.6
Sports				✓	2.3
Tepee Raising				✓	2.2
Touring		✓	✓	✓	1.4
Touring by car		✓	✓		2.0
View wildlife/bird watching	✓	✓	✓	✓	2.6
Viewing natural phenomena	✓	✓	✓		2.6
Visit aboriginal attractions			✓		2.5
Visiting scenic landmarks				✓	2.4
Visiting sites of historic significance	✓	✓	✓	✓	3.0
Visiting villages		✓	✓	✓	2.0
Wilderness camping	✓	✓	✓		2.6

[1]Note: Ratings were developed by PwC Consulting in consultation with representatives of Alberta Economic Development and Aboriginal Business Canada. Ratings are based on the results of the resource capability analysis.

The following sections provide more detail on the product market match for the target segments in each of the geographic markets identified in *Chapter 2*.

Short-Haul Product Market Match

As defined earlier, this market is motivated by chances to experience aboriginal products that are active/recreation/outdoor oriented and those that are nature and eco-tourism based. More specifically, Canadians are more likely to "step off the beaten path" and look for opportunities that provide excitement, adventure and authenticity. Their key activities include visiting historic and cultural sites, natural areas, going for hikes/backpacking, camping, wilderness lodges, viewing wildlife, birds or flowers and attending local festivals and events, powwows and native dances.

The key products that the Aboriginal Tourism industry has to offer this segment include (product strengths):

- The approximately 52 historic and cultural aboriginal sites and interpretative centres / attractions that are dispersed throughout the Province including Head-Smashed-In, Fort Whoop-up, Siksika Cultural Centre etc.;
- The numerous (about 32) aboriginal festivals and events, including Buffalo Days, the Calgary Stampede and Metis Week to name a few;
- Ample opportunities to experience nature through Alberta's extensive Parks and trail system where one can experience hiking, viewing wildlife, canoeing, etc.

Given the above list, the Aboriginal Tourism industry might want to consider some of the following product enhancements/additions:

- While wildlife opportunities exist in abundance in Alberta, there is a need for additional opportunities for visitors to participate in the viewing of and learning about the wildlife and ecosystem of the region, including how the aboriginal people interpret it, perhaps through interpretative trails, walks, guided canoe trips, etc. For example, bird-watching trips could be organized and combined with a native dinner and/or an aboriginal cultural exhibit;
- Similarly on the recreation side, Alberta offers abundant streams, rivers, mountains and parks. The aboriginal community could take greater advantage of this terrain through activities such as horseback riding, canoeing, fishing and visiting native sites. The key is that these opportunities would allow visitors to learn more and experience the traditional native way of life; and
- Many of the aboriginal museums and interpretative centres are small and cannot draw groups on their own. Thus, museums and points of historical interest need to be packaged together with other aboriginal opportunities to create one or two day visit experiences.
- Although, there are numerous accommodations throughout the Parks such as campgrounds, lodges and resorts, few of these are aboriginal owned and themed.

Long- Haul North American Product Market Match

The motivations for this segment are similar to the above. The long-haul market tends to look for a mix of experiences including those that combine the active, learning, natural and entertainment side. This group is more likely to take touring vacations by car, especially the US market. As well, the US market is more likely to look for shopping and casino/gambling experiences. Experiencing and learning about native culture and hunting, fishing and trapping opportunities will be more popular with the Long-Haul visitor.

In addition to the products described for the short-haul market, key products that the Aboriginal Tourism industry has to offer this segment include (product strengths):

- There are strong opportunities to learn about the native culture and way of life through the interpretive centres and numerous festivals and events that take place; and
- There are 11 different tour operators in Alberta focused on aboriginal tourism. The focus of these operations appears to be more on the interpretive tours.

To better succeed in attracting visitors to the Province from this segment, some of the following ideas might be pursued:

- Consider adding driving tours based on nature and aboriginal cultural experiences and sites. The stopping points could include historic points of interest and visitors could refer to a guidebook or audiocassette describing the tour.
- Expand the breadth of tour operators and have some more focused on the backcountry/wilderness lodges together with hunting/fishing/trapping experiences.
- Tour companies, local accommodations and other aboriginal attractions need to collaborate more to offer packages geared toward families and individuals. For example a two day tour could be packaged that includes a day of canoeing, overnight at Nakoda Lodge, traditional native cuisine and a visit to a historical burial ground or a tipi village.
- Consider adding a reserve-based casino.

Long-Haul Overseas Product Market Match

The third market identified as offering potential for aboriginal tourism is the long-haul overseas segment. This group wants to participate in a combination of sightseeing, recreation and cultural experiences, but they also place a strong emphasis on experiencing authentic products and learning about the local culture. Combination packages are important to this group as well.

Once again, Alberta's aboriginal product is strong in terms of the number of cultural and historical experiences. But it is the packaging of these with other elements (like accommodation, dining and festivals) that the industry falls short on and this is key for capturing the overseas market. Additionally:

- There appears to be a shortage of market ready product to meet a growing demand from overseas visitors for traditional native attractions, music, cuisine and shopping. Overseas visitors, especially from Germany, want to experience native lifestyle in an interactive way, such as helping to build a canoe, dog sledding, building a tepee and visiting a sweat lodge; and
- Visiting national parks and viewing wildlife are important to this group, especially within the German and Japanese markets. While wildlife and national parks are numerous, there is a need for packaging these experiences together with the aboriginal culture side.

Product Opportunities

Following is a brief description of seven potential aboriginal tourism product opportunities that were identified as a result of the product market match discussed earlier. The purpose of these descriptions is to present an overview of the various concepts. In the following chapter, the top five opportunities are further explored in terms of a high level strategy to bring them to market.

Tour Routes

- A tour route is a formally mapped out and marketed itinerary linking several tourism products (i.e., historical sites, museums, accommodations, hiking trails, etc.) of a similar theme in a particular geographic area, for example, to tell the story of a particular tribe's migration. They are typically driving routes that can be explored by car or tour bus.
- They could be long multi-day routes covering the entire province or short two-hour routes covering only 10 kilometres.
- These tour routes would incorporate Alberta's aboriginal history and culture and would essentially be a story telling mechanism that would be capable of bringing stories and legends to life.
- Usually, these routes are marked with a series of signs that provide users with both direction and interpretation.
- In some cases, users can purchase a CD (or cassette) at the start of the route. The CD provides a narrative explaining the story/sights of the route as the user drives the route. The narrative is timed to an average driving speed.

Aboriginal Themed Accommodation

- This may be developed as a new accommodation or from existing accommodations.

- These accommodations would be designed to offer visitors the opportunity to experience the traditional aboriginal way of life.
- There are many possible ways in which to go about theming an accommodation. Some possibilities might include:
  - A tipi village
  - A fly-in fishing/hunting lodge that offers the experience of hunting and fishing as the aboriginals once did.
  - A campground offering hiking or canoeing along historical aboriginal trails or passing by historic sites such as a burial ground.
  - A resort offering programs designed to allow visitors to experience the traditional aboriginal way of life. For example, participation in sweat lodges, pipe ceremonies and native dances.

Aboriginal Themed Restaurant

- A themed restaurant would be designed to offer visitors the opportunity to experience the traditional aboriginal cuisine.
- Again this could be developed from scratch or from an existing restaurant.
- Some options to consider for the themed restaurant include:
  - Dishes could be served in the traditional manner, including customs, ceremonies or rituals. Alternatively, while the food would be prepared in an aboriginal style, dishes could be served in a traditional North American restaurant style.
  - Staff could be dressed in traditional aboriginal attire or in modern day wait staff attire.
  - The physical setting could also be that of a typical North American restaurant, or meals could be served in a more traditional setting (e.g., recreate the dinning area in which the tribe used to eat).

Casino

This would be a casino similar to those on Indian reserves elsewhere in North America. This is the only opportunity being recommended that does not have an aboriginal theme to it. Two key considerations include:

- The casino could be part of an existing or potential resort or cultural centre.
- For the biggest draw, it should probably be located close to one of the two major cities in Alberta (Calgary or Edmonton).

Packaging Opportunities

Packaging is defined as the presentation of a number of select products and services that would normally be purchased separately, but which in a package are offered as a single product at a single price. In the case of the aboriginal tourism industry, packaging of events, attractions and accommodations is key to expand the market reach, particularly for overseas markets.

Packages could be built around sub-themes that are relevant to the target markets, such as:

- Culture and History: touring, experiencing native cuisine, visiting an aboriginal village;
- Adventure/Eco-tourism: hiking/canoeing, interpretive nature trails, accommodation, native cuisine; and/or
- Experiential: Sleeping in a Tipi; experiencing a sweat lodge; and dining on native cuisine.

Aboriginal Cultural Centre

- This attraction would represent a learning centre, where visitors could get an appreciation for aboriginal life and culture.
- The attraction could incorporate a vast array of components both indoors and outdoors. Some examples of potential offerings may include:
  - museums;
  - interpretive videos;
  - self guided hiking trails using interpretive signs;
  - story telling using 3D story boards (i.e., model villages, a model of a traditional hunt);
  - shows including native dances, ceremonies or rituals;
  - hands on learning of processes; and
  - viewing of ancient ruins, burial grounds or significant carvings/drawings.

Re-enactive / Interactive Villages

- This attraction would essentially consist of an aboriginal village recreated to reflect an actual village as it may have stood in a chosen time period.
- The village would be designed to provide visitors with the opportunity to see the aboriginal way of life in the chosen period. Elements that might be portrayed include living conditions, daily routines, roles of different members of the tribe, diet, processes for making/preparing things and more.
- Visitors should feel as though they participated in an authentic experience.
- An example would be a full recreation of a village where staff play the role of different tribe members going about their daily routine. Visitors would walk around the village and interact with the various characters who would explain what their role is, what it is they are doing and explain any special processes or rituals around what they do. It would be similar to a pioneer village such as Upper Canada Village in Ontario.
- The attraction may also incorporate plays, dances, interpretive signage and technology to help better tell the story.

- Visitors may be offered the opportunity to participate in some activities such as helping to build a canoe, dog sledding, building a tepee and visiting a sweat lodge, giving them a hands-on learning experience.

Infrastructure Needs Assessment

Exhibit 4-2 below provides a summary of the various infrastructure dimensions that support the aboriginal tourism industry and an assessment of these components.

EXHIBIT 4-2 – INFRASTRUCTURE NEEDS ASSESSMENT		
Infrastructure Dimensions	**Assessment**	**Rating of Alberta's Infrastructure** [1] (Use a 1-5 scale, where 5 means "strong" and 1 indicates " very weak")
Education and Training	• Limited skilled resources. • Poor attitudes. • Limited understanding of how the industry works.	1.6
Marketing/ VIC's	• Limited awareness of Aboriginal Tourism products. Limited partnering with other organizations like Travel Alberta. • Current marketing lacks coordination • Low awareness and participation in Niitsitapi.	1.8
Funding	• Low awareness of funding programs and how to access. • Lack of start-up capital/equity. • Limited funds. • Limited credit history. • Slow in being issued from ABC.	2.4
Operational Policies and Signage	• Operators near or in park facing greater restrictions relative to trail access. Limiting authenticity of products. • Challenges in securing permits to access certain areas. • Limited highway signage.	2.4
Access/ Roads/ Air	• Most TDRS have excellent road coverage. Some limited access to remote areas in Northern Alberta. • Sufficient air service	3.6
Accommodations	• Some TDR's/communities experience shortages during peak periods, a common trend in tourism • North TDR has identified some accommodation shortages in winter • Most businesses indicate that there is sufficient accommodation. • Accommodation shortages identified by Stoney, Standoff, Brocket, Hobbema and Goodfish Lake.	3.3
Support Services/ Retail	• Usually combined with a hotel or other attraction (i.e., Chief Chiniki)	3.2
Technology	• Most have access to internet and e-mail • Basic technology and old hardware/software • 30% of businesses have other people advertise for them. • Use technology primarily for advertising and email.	2.7

[1]Note: Ratings were developed by PwC Consulting in consultation with representatives of Alberta Economic Development and Aboriginal Business Canada. Ratings are based on the results of the resource capability analysis.

The table indicates that the weaknesses on the infrastructure side relate primarily to marketing of the industry in general and to the education and training/level of skill of people employed in the aboriginal tourism industry. These elements were consistently ranked lower than any of the other elements and were consistently mentioned as weaknesses when conducting our stakeholder interviews and site visits.

Limited funding and access to capital were also mentioned as weaknesses on the infrastructure side, however these funding challenges are experienced by all players in the tourism industry and more difficult to address. The key will be to make aboriginal operators more aware of the funding options available to them

Some strategies for overcoming some of these issues are discussed in the next chapter.

5. Enhancing the Aboriginal Tourism Industry — A High Level Implementation Strategy

The research presented in this report clearly shows there is demand for aboriginal tourism products, and that Alberta is well positioned to capitalize on many of the major travel trends of European, Asian, American and domestic cultural visitors. Clearly, the research points to opportunities for growth of aboriginal tourism in the Province, but also identifies challenges to the current product and service mix, and to existing infrastructure.

In order for the aboriginal tourism industry in the Province to grow and capitalize on the target markets outlined in this report, certain areas need to be addressed immediately. To assist with this, a number of "priorities for action" have been identified that should be considered to enhance the state of the industry. A high-level implementation strategy for each priority that identifies specific action steps has been developed and is presented in this chapter.

As part of the implementation strategy for specific product opportunities, a number of comparable aboriginal tourism products from around the world have been identified for reference purposes. These products are meant to provide ideas relative to specific concepts and service offerings and should be considered as part of any future research initiatives moving forward.

The priorities for action are discussed below.

Priorities For Action

Communication of Funding Opportunities and Submission Requirements

Prior to addressing the action items identified, the overall issue of funding must be considered. A number of specific actions have been outlined to help grow and enhance the aboriginal tourism industry in the Province, however many of these will require additional funding and investment, especially on the product development side.

First and foremost, it is absolutely critical that aboriginal business owners and operators know about the different avenues available to them for accessing funds, whether they be grants, traditional bank loans and/or sponsorships. Communication of the various sources of funds becomes important and ensuring that aboriginal businesses have the appropriate mechanisms and information required to access available funds, such as business plans for new start-ups and credit histories.

Second, is increasing the type and amount of financing opportunities available to aboriginal businesses. This could entail increasing available grant amounts and/or making it easier for business owners to access bank financing.

A More Proactive Approach to Marketing

Clearly, one of the major issues identified in this report is the limited awareness of the aboriginal product opportunities offered in the Province and the lack of an effective/coordinated marketing approach.

A successful marketing program is a key element to enhancing visitation to the Province and to the various aboriginal tourism attractions. A strong marketing and communications program must begin with a vision for the industry. The vision should be developed by representatives of the aboriginal tourism industry and have buy-in from all participants.

The marketing program should be a co-operative venture between all aboriginal tourism operators and led by a central organization such an Alberta wide aboriginal tourism body. Following are some of the more specific changes that need to occur on the marketing side.

Consistent with the product inventory and market potential, three major visitor segments have been identified that offer potential for aboriginal tourism – the short-haul market; long-haul North American; and long-haul Overseas. The key is how to effectively reach these segments. In other words:

- What advertising/promotional vehicles should we use?
- What messages need to be communicated to entice people to experience aboriginal culture?
- How do we pay for the advertising and promotion plans?
- How do we measure success?

The key approaches to enhance the marketing of aboriginal tourism in the Province lie in coordination, partnerships and focus. To achieve these objectives, it is necessary to:

- Develop a broad role for an Alberta wide aboriginal tourism body, one that involves participation in both domestic and international marketing activities. This can only be achieved through an effective and coordinated marketing strategy, partnerships and through greater membership and participation in the organization. Such an organization needs to have a sufficient number of people on the ground working with the local tourism operators advising and coordinating — make it easy for even the smallest businesses to be an active member of the organization, by creating a number of different options to generate buy-in;
- Develop a marketing strategy for the industry. The strategy needs to include:
  - ***A distribution plan for brochures or other promotional material.*** The most cost-effective way is through related merchants and destination marketing

organizations. As well, the internet must not be overlooked, as it is increasingly becoming a tool for travellers looking for specific destination information;

- ***Trade shows*** such as those organized by the Canadian Tourism Commission in the US which are designed to showcase Canadian attractions and regions to the US tour operators, travel agents, auto clubs and the travel media. This is an example where an Alberta wide aboriginal tourism body might attend the trade show as part of Travel Alberta's delegation;
- ***Partnerships are also essential.*** Only about 17% of operators indicated they take part in a partnered marketing program with organizations such as Travel Alberta, local TDR's and other local tourism agencies and CVB's. Efforts should be made to participate in some of the marketing partnerships offered by the various organizations and to seek assistance from them in terms of packaging specific product opportunities. For example, if your business lends itself to bus tours, then you should be in touch with the leading motorcoach tour operators.

Enhance The Understanding of Tourism Within the Aboriginal Community

One of the issues identified through the research is the lack of awareness of the benefits created by Aboriginal Tourism, both within the aboriginal community and outside the community. Clearly, some form of communications plan needs to be in place so that people, including the various bands and their chiefs, can understand the importance of the industry and its economic benefits. The intent of the communications plan is to:

- Inform local residents about the region's appeal as an aboriginal tourism destination;
- Inform aboriginal businesses and others about the benefits of being an active member of the tourism offering in the region, including participation in a tourism association or partnership;
- Inform potential partners and the media about the position held by the Aboriginal tourism industry and its market potential; and
- Generate enthusiasm for the expansion of the aboriginal tourism product base and the required infrastructure.

The communications strategy is one that could be adopted by an organization an Alberta wide aboriginal tourism body and its members as well as related stakeholders, including economic development professional, government and other businesses. It should be a continuous effort and evolve to include other goals and audiences.

Improve Training and Education Opportunities

Clearly the research shows that more education and training needs to occur. Many of the business owners lack basic business skills, including marketing, computer training and a general understanding of the tourism industry. Additionally, many of the workers employed in the industry have limited customer service skills and poor work ethics.

One of the critical success factors for any tourism operation is to create a memorable tourism experience – this experience includes a combination of factors, but customer service and the way employees interact with guests ranks high up on the list.

In order to address this issue efforts should be made to provide more opportunities for business owners or employees to learn and educate themselves, either through on-line learning, CD Roms or seminar specific courses.

- Provide learning opportunities including those focused around customer service, marketing, business management, tourism industry structure and trends. One potential training avenue open is to partner with the Canadian Tourism Human Resource Council (CTHRC) to develop training programs for staff; and
- Tourism market information and trends geared towards aboriginal businesses could be collected by a central organization and sent out in a monthly newsletter or through e-mail.

Product Opportunity Implementation

In the previous chapter, seven specific aboriginal culture product opportunities were identified as having potential based on the product market match. Broad overview concepts were presented for each of these products. This section expands further of five on these opportunities. It should be noted that the two opportunities not selected for this section (tour routes and casinos) are also excellent opportunities that merit further investigation.

In the following pages, a series of tables (one for each selected product) is presented to provide additional information to help bring the products to market including product ideas, a high-level implementation strategy and examples of similar existing products in other markets. The information in these tables represent a starting point and is intended to provide a framework from which the industry can begin to work from. This plan will evolve and change over time.

The locations suggested are based on the geographic distribution presented in the map in the Resource Capability section (see **Exhibit 3-7**). The location recommendations are based what is in the surrounding area. For example, in some cases, it may be because there is a critical mass of complimentary tourism products in the area, while in other cases it may be because there is a lack of tourism products and services. The location also takes into account proximity to major centres that help drive tourism. The recommendations are only suggestions and a detailed feasibility study would be required before proceeding with an option.

Further research and planning is needed before pursuing any specific idea. A true implementation plan will require buy-in and recognition of the available resources to complete this plan. In this regard, details may be presented at a higher level, with further detail to be agreed upon by representatives from the Aboriginal Tourism industry. ***The cost estimates are provided for reference purposes only and may or may not be representative***

of the actual costs incurred. More detailed planning and scoping is required before firm cost estimates for a specific project can be developed.

Each of the five product opportunities and concepts are presented below.

Product Opportunity 1 – Aboriginal Themed Accommodation	
Opportunity Possibilities	
Concept 1:	**Backcountry Wilderness Lodge**
Opportunity Overview	• Fly-in fishing or hunting lodge in a remote, natural setting. Eco-tourism oriented. 25-50 rooms. Small restaurant component that serves traditional native cuisine. • Offers the experience to hunt, fish and live as the aboriginals once did; horseback riding/trail riding; hiking. Eating aboriginal cuisine, accommodations designed and decorated in aboriginal style with local crafts.
Potential Operators	• New Development, run by one of the Bands or done in conjunction with one of the existing tour operators. • Alternatively, could comprise theming an existing property with cuisine and activities. A more detailed assessment of the wilderness lodges in the Province is needed to determine feasibility of expanding an existing property.
Location	• Kananaskis/Foothills area; Fort McMurray/Athabaska region • Needs to be close to lakes, and/or rivers
Timing	• 1 to 3 years.
Concept 2:	**Campground/Tipi Village**
Opportunity Overview	• Located close to other aboriginal cultural/historic sites and in a backcountry setting. Close to streams/ hiking trails/horse trails. The campground could offer a combination of open spaces and/or pre-built tipis for visitors to rent. • Seasonal operation (May to October).
Potential Operators	• Could be done in conjunction with an existing operation or development of a new campground. The number of aboriginal run campgrounds in the Province is limited.
Location	• Situated outside of National Parks/foothills region, such as Kananaskis Country; Bragg Creek
Timing	• 1 to 3 years
Concept 3:	**Resort**
Opportunity Overview	• A full service resort product that offers guests the opportunity to experience the traditional aboriginal way of life and culture, including native cuisine, pipe ceremonies, sweat lodges, dancing and crafts.
Potential Operators	• Expansion of existing operation like Nakoda or the Sawridge in Jasper. • Conduct a feasibility study for a new development.
Location	• Potential location to include outside Banff (Canmore and Kananaskis region), Fort Macleod-Waterton-Crowsnest Pass region, or in Northern Alberta.
Timing	• 3 to 5 years.

PRODUCT OPPORTUNITY 1 – ABORIGINAL THEMED ACCOMMODATION	
IMPLEMENTATION ISSUES	
Potential Key Players	
Player:	*Role:*
Federal/Provincial Government	• Facilitate the feasibility and development RFP process. • Assist in partner relations. • Assist in obtaining funding.
Provincial Aboriginal Tourism Body	• Assist in identifying possible locations and partners/aboriginal operators. • Take the work/studies commissioned by AED to local communities or bands in areas of high potential and work with them to have the communities develop the product, train staff and undertake marketing.
Hotel Associations	• Identify possible locations and specific opportunities.
CVB's	• Identify marketing issues and avenues. Ensure that the products are oriented towards the right audiences.

Marketing Issues		
Objective:	*Challenge:*	*Actions:*
• To create awareness for new accommodation development. • Target new markets.	• Limited awareness of aboriginal tourism products in the Province. • Abundant good quality, non-native competing accommodation exists. • Current aboriginal tourism marketing is fragmented and weak.	• Create a stronger, centralized marketing organization for aboriginal tourism that helps to build awareness of the opportunities within the communities and then allows them to develop the product in accordance with market requirements. • Develop an internet-based strategy. • Work with CVB's and the local hotel associations to assist in awareness building.
• Leverage new accommodation by partnering with other tour operators/products	• Attracting appropriate and beneficial product partners.	• Bring operators together or create an organization that unites operators to promote the industry and identify potential partnering opportunities. • Use an organization like an Alberta wide aboriginal tourism body to facilitate process and create framework for packaging.
• Focus on the highest value or value-added product segment – greatest return will be received by focusing on this segment.	• For example, value conscious consumers, who are increasingly willing to spend a little extra to receive top quality service and accommodations.	• Conduct research into their information habits of these segments – what magazines do they read; internet sites.

PRODUCT OPPORTUNITY 1 – ABORIGINAL THEMED ACCOMMODATION	
Potential Partnerships	
Partner:	*Relationship and Role:*
Fed. Government and other aboriginal economic development agencies	• Funding Support
Travel Alberta/ATTC	• Marketing Support
Provincial Aboriginal Tourism Body	• Marketing support and coordination of Aboriginal tourism in Alberta
CVB's	• Marketing and awareness building, potential packaging opportunities.
Operational Issues	
Issue	*Action*
Band Politics	• Create Buy-In and awareness of benefits of tourism
Environmental Issues	• Environmental impact assessment.
Staff training/resource capability	• An Alberta wide aboriginal tourism body to provide access to training programs together with educational institutions. • Recruit aboriginals into SAIT/NAIT hospitality programs at educational institutions.
Packaging	• Work with a central aboriginal marketing organization like an Alberta wide aboriginal tourism body or the CVB's to assist in bringing players together.
Costs	
Order of Magnitude Costs	• Estimated cost to build is $75,000 per room (excluding furniture) for a small hotel according to the Marshall & Swift Cost Manual. • Based on involvement in the development of three tipi villages, Alberta Economic Development reports average development costs of $125,000 to $175,000.
Infrastructure Considerations	
Change Needed:	*Action:*
Access to remote areas	• Road improvements by Alberta Infrastructure or local bands, airstrip development by operators or bands, development of seaplane landing areas
Signage	• Alberta Transportation/Federal to assist operators in developing and posting appropriate signage (highway and other).

COMPARABLES			
Comparable	*Location*	*Size*	*Description*
Naestie Tourist Centre – Sami Owned www.itv.se/boreale/naestie_hotel.html	Sweden	Small	Combination of hotel rooms, camping and cottages, eco-tourism oriented. Motto is to use but not consume.
Warbonnet Lodge	Blackfeet Indian Reservations – Browning, Montana	10 tipis which can accommodate up to 20 guests, 20 ft. in diameter	Central lodge with dining, shower, sauna and lounge, trail riding, native arts and crafts, experience native way of life.
Tsa-Kwa-Luten Lodge www.capemudgeresort.bc.ca	British Columbia, Cape Mudge, Quadra Island	30 rooms	

PRODUCT OPPORTUNITY 1 – ABORIGINAL THEMED ACCOMMODATION			
North Nahanni Naturalist Lodge www.nnnlodge.com	Fort Simpson, Northwest Territories, Canada	Lodge and cabins	All naturalist and outdoor activities. Indoor cultural activities with Dene Elder; history of local artefacts, people & surroundings, i.e. Drums, Handmade Tools, Medicinal Plants, Dene drumming and song demonstration, birch bark baskets & traditional craft making, basic wilderness survival.
NEXT STEPS TO BRING TO MARKET			
• More detailed inventory and feasibility study and concept development. • Build the business case for investment in tourism infrastructure as a means of creating jobs and new businesses that are environmentally friendly. • Identify potential partners. • More coordinated aboriginal tourism organization and marketing.			

PRODUCT OPPORTUNITY 2 – ABORIGINAL THEMED RESTAURANT	
OPPORTUNITY POSSIBILITIES	
Concept 1:	**Themed Fast Food Restaurant**
Opportunity Overview	• There is a shortage of interesting aboriginal dining experiences offering local foods and techniques. • Similar to fast-food sandwich or burger shop, except this concept involves selling native cuisine like bannock, buffalo burgers etc.
Potential Operators	• New development or existing operator looks at franchising into other areas/or at events (i.e. Food kiosk at Stampede).
Location	• Near other aboriginal tourism attractions or centres. Consider locations in the National Parks. • Location along major tourist transportation routes will be important to take advantage of drive by traffic.
Timing	• 1 to 3 years.
Concept 2:	**Themed Sit-Down Restaurant**
Opportunity Overview	• A more formal native dining experience that serves traditional dishes in a traditional manner, accompanied by native ceremonies and dances. Wait staff could be dressed in traditional native wear. • Could be traditional dining setting or re-create the traditional meal setting.
Potential Operators	• New development or expansion of an existing restaurant.
Location	• Situated outside of National Parks/foothills region, such as Kananaskis Country; Bragg Creek, Canmore Calgary, Red Deer and Edmonton. • Near other tourism attractions like a native cultural centre; village, museum etc. Along major tourist transportation route.
Timing	• 1 to 3 years

PRODUCT OPPORTUNITY 2 – ABORIGINAL THEMED RESTAURANT		
IMPLEMENTATION ISSUES		
Potential Key Players		
Player:	*Role:*	
Federal/Provincial Government	• Facilitate the feasibility and development process. • Assist in partner relations. • Assist in obtaining funding.	
Provincial Aboriginal Tourism Body	• Assist in identifying possible locations and partners/aboriginal operators.	
Restaurant Associations	• Identify possible locations and specific opportunities.	
CVB's	• Identify marketing issues and avenues. Ensure that the products are oriented towards the right audiences.	
Marketing Issues		
Objective:	*Challenge:*	*Actions:*
• To create awareness for new foodservice development/Target new markets	• Lack of strong awareness for aboriginal tourism in the Province. • Abundant good quality, non-native restaurants exist. • Current marketing is fragmented. • Locations must be readily accessible.	• Create a stronger, centralized marketing organization for aboriginal tourism. • Work with CVB's and the local restaurant associations/chamber of commerce to assist in awareness building.
• Enhance and develop aboriginal dining experience	• Matching authenticity and setting to tastes and demands of the market segments.	• Combine dining experience with a local aboriginal festival and cultural demonstrations – other opportunities exist to offer local produce and cooking which are seasonal
Potential Partnerships		
Partner:	*Relationship and Role:*	
Fed. Government and other aboriginal economic development agencies	• Funding Support	
Travel Alberta/ATTC	• Marketing Support	
Provincial and National Restaurant Associations	• Research and Support	
Provincial Aboriginal Tourism Body	• Marketing and support through coordination of operators and in delivering programs.	
Operational Issues		
Issue	*Action*	
Band Politics	• Educate band leaders as to the importance of the aboriginal tourism industry.	
Funding	• Assess partnerships and sponsorship approaches	

Product Opportunity 2 – Aboriginal Themed Restaurant			
Staff training/resource capability	• An Alberta wide aboriginal tourism body to provide access to training programs together with educational institutions. • The Canadian Tourism Human Resource Council also offers several tourism training programs. • Recruit aboriginals into SAIT/NAIT hospitality programs at educational institutions. • Educate operators on the tourism industry, small business management.		
Packaging/partnering	• Work with a central marketing organization like an Alberta wide aboriginal tourism body or the CVB's to assist in bringing players together. • Get in touch with leading motor coach companies to promote foodservice operation as a stop on the tour.		
Costs			
Order of Magnitude Costs	• Depending on quality, industry average ranges from $63 per sqft to $190 per sqft. Average cost is $88 per sqft. according to the Marshall & Swift Cost Manual • Three major Canadian fast food chains advertise average start up investments that range from $400,000 to $750,000.		
Infrastructure Considerations			
Change Needed:	*Action:*		
CVB and VIC	• Assistance with marketing and awareness building of aboriginal tourism in Alberta.		
Signage	• Federal and provincial governments to assist operators in developing and posting appropriate signage (highway and other).		
COMPARABLES			
Comparable	*Location*	*Size*	*Description*
Quaaout Lodge Resort www.shuswap.worldweb.com/restaurants/Aboriginal/index.html?vid=19671099	Little Shuswap Lake, British Columbia	N/A	First Nations decor and dishes such as bird or salmon in clay and rabbit or buffalo ragout. Native cultural tours cover Sweat lodge, Kekuli and Smoke Salmon House. Native storytelling, dancing, traditional games and dinner theatre. Bike and canoe rentals, trail rides
Keenawii's Kitchen www.haidagwaiibc.com/what_to_do/haida_eats/haida_eats.html	Village of Skidegate Haida Gwaii, Queen Charlotte Islands, British Columbia	Groups as large as 35	Traditional Haida food and decor
NEXT STEPS TO BRING TO MARKET			
• More detailed inventory and feasibility study/concept development • Identify potential partners/developers			

PRODUCT OPPORTUNITY 3 – ABORIGINAL CULTURAL CENTRE	
OPPORTUNITY POSSIBILITIES	
Concept 1:	**Stand-Alone Cultural Centre**
Opportunity Overview	• This attraction would represent a learning centre, where visitors get an appreciation for aboriginal life and culture. It could incorporate a vast array of components both indoors and outdoors. Some examples of potential offerings may include: - museums; - interpretive videos; - self guided hiking trails using interpretive signs; - story telling using 3D story boards (i.e., model villages, a model of a traditional hunt); - shows including native dances, ceremonies or rituals; - hands on learning of processes (i.e., building a canoe or tipi); and - viewing of ancient ruins, burial grounds or significant carvings/drawings.
Potential Operators	• Could be a new development, run by one of the Bands either on or off reserve, or could be an expansion/addition to an existing complementary attraction
Location	• With the Lakeland Centre being developed in the North, a more southern/central location such as the Kananaskis/Foothills area, Chinook Country, Waterton or on the outskirts of Calgary is suggested. • Should be situated close to accommodation, dining and other activities to create a "critical mass" of activities
Timing	• 3 to 5 years
Concept 2:	**Multi-Use Cultural Centre**
Opportunity Overview	• Similar to above, but would include other components such as a sports centre, accommodation, camping, dining, meeting space, a craft centre.
Potential Operators	• Could be a new development, run by one of the Bands either on or off reserve, or could be an expansion/ addition to an existing complementary attraction.
Location	• Southern Alberta (Calgary and south)
Timing	• 3-5 years
IMPLEMENTATION ISSUES	
Potential Key Players	
Player:	*Role:*
Federal/Provincial Government	• Facilitate the feasibility and development/RFP process. • Assist in partner relations and working with other government departments. • Assist in obtaining funding.
Provincial Aboriginal Tourism Body	• Assist in identifying possible locations and partners/aboriginal operators. • Concept development.
Provincial Government Agencies	• Identify possible locations and specific opportunities.
CVB's	• Identify marketing issues and avenues.

PRODUCT OPPORTUNITY 3 – ABORIGINAL CULTURAL CENTRE		
Marketing Issues		
Objective:	*Challenge:*	*Actions:*
• To create awareness for the new attraction.	• Limited awareness of aboriginal tourism products in the Province. • Current aboriginal tourism marketing is fragmented and weak.	• Create a stronger, centralized marketing organization for aboriginal tourism that helps to build awareness of the opportunities within the communities and then allows them to develop the product in accordance with market requirements. • Develop an internet based strategy. • Work with CVB's and the local hotel associations to assist in awareness building.
• Create a critical mass of attractions/activities by partnering with other products.	• Attracting appropriate project partners	• Identify complementary attractions like a museum/tepee village and gift shop – cluster together.
• Create excitement and interest in Aboriginal Culture products	• Overcome perceptions of what some believe is the aboriginal "way of life" • Up against competing/non-native attractions	• Educate public on the traditional aboriginal way of life and history • Show short films • Partner with Parks Canada on interpreting aboriginal history

Potential Partnerships	
Partner:	*Relationship and Role:*
Fed./Prov. Government and other aboriginal economic development agencies	• Funding Support
Travel Alberta/ATTC	• Marketing Support
CVB's	• Marketing Support
Provincial Aboriginal Tourism Body	• Marketing support and coordination of Aboriginal tourism in Alberta

Operational Issues	
Issue	*Action*
Band Politics	• Demonstrate economic benefits of tourism.
Environmental Issues	• Work with Parks and other agencies to minimize impacts. Conduct an environmental impact assessment study as part of the feasibility process.
Staff training/resource capability	• An Alberta wide aboriginal tourism body to provide access to training programs together with educational institutions. • Recruit aboriginals into SAIT/NAIT hospitality programs at educational institutions. • Federal government programs.
Packaging	• Work with a central marketing organization like an Alberta wide aboriginal tourism body or the CVB's to assist in bringing players together.

PRODUCT OPPORTUNITY 3 – ABORIGINAL CULTURAL CENTRE	
Costs	
Order of Magnitude Costs	• While the final costs will depend on the scope of the project, as a benchmark, the Lakeland development in Lac La Biche will cost an estimated $4.8 million to build a full scale, multi-use centre. • Costs for a new facility can range well into the tens of millions of dollars. • Depending on quality, industry average ranges from $76 per sqft. to $187 per sqft. Average cost for this type of building is $102 per sqft. according to the Marshall & Swift Cost Manual
Infrastructure Considerations	
Change Needed:	*Action:*
CVB or VIC's	• Local representation and coordination for packaging and marketing activities.
Signage	• Federal and provincial governments in conjunction with Travel Alberta to assist operators in developing and posting appropriate signage (highway and other).

COMPARABLES			
Comparable	*Location*	*Size*	*Description*
Didgeridoo University of Central Australia www.aboriginalart.com.au/culture/tourism.html	Alice Springs, Australia	3 directors, 5 Staff Award winning, fully aboriginally owned and operated community (700) enterprise	Aboriginal Music, Art, Cultural centre, restaurant, art and music classes, local tours of aboriginal sites
Tjapukai Aboriginal Culture Park www.tjapukai.com.au/welcome.htm	North Queensland Australia	Capacity – groups up to 2000 persons, tourists, student and corporate groups 25 acres	Museum-theme park, (120 guests) Restaurant, (350) Dance Theatre, (100) Rain forest marquee, (800) Cultural tours
Hanson Pueblo Cortez Cultural Centre www.cortezculturalcenter.org/tours.html	Cortez, Colorado, USA	Limited to 24 persons/group	Guided tour of archaeological sites, also museum and Art Gallery
Xats'ull Heritage Village www.cariboo-net.com/xatsull/village.html	Near Williams Lake, Fraser River, Caribou Country British Columbia	1 day to 12 day programs	History and construction of traditional native dwellings (pit-houses, tipis) Tour of the traditional fishing site with an explanation of various fishing methods Traditional food preparation Seasonal activities of the Shuswap people Customs/Language Arts and crafts activities Birch basket making workshops Lahal game/Storytelling by an Elder Sweat lodge

PRODUCT OPPORTUNITY 3 – ABORIGINAL CULTURAL CENTRE
NEXT STEPS TO BRING TO MARKET
• More detailed inventory and feasibility study and concept development. • EAI assessment. • Build the business case for investment in tourism infrastructure as a means of creating jobs and new businesses which are environmentally friendly. • Identify potential partners and funding organizations.

PRODUCT OPPORTUNITY 4 – PACKAGING	
OPPORTUNITY POSSIBILITIES	
Concept 1:	**One- Two Day Packages**
Opportunity Overview	• Example could be a day of canoeing combined with an overnight stay at Nakoda lodge, traditional native cuisine and a visit to a historical burial ground or tipi village.
Potential Operators	• Numerous existing and potential operators. • Local band level CVB brings operators together to package. This group liaises with an Alberta wide aboriginal tourism body or Provincial scale for marketing. • An Alberta wide aboriginal tourism body or similar organization facilitates developing packages; work with local tourism operators.
Location	• Focus on areas where existing native attractions/accommodation exist, such as Nakoda lodge, Head Smashed In. Close driving distance from Calgary/Edmonton to capture City visitor market.
Timing	• Immediate
Concept 2:	**Three to Five Day Packages**
Opportunity Overview	• These packages cater towards the North American drive market and/or Overseas fly/drive market. • Should have a number of different modular components like accommodation, dining, activity, visit to a cultural centre and/or local powwow. • A package of aboriginal activities that includes accommodation and dining that caters to National/Provincial Park visitors could leverage off the busy summer parks season. • Create packages to meet the growing demand for natural history and observing wildlife as well as authentic aboriginal cultural history. • Combine backcountry/wilderness experiences (i.e., hunting and trapping) with accommodation, dining and native cultural demonstrations (i.e., dances, powwows or festivals).
Potential Operators	• Existing aboriginal tourism operators work together to create new packages. • Existing tour companies who want to expand product offering.
Location	• More remote settings; further from cities; Banff; Waterton Lakes; Kananaskis; Jasper
Timing	• Immediate

Product Opportunity 4 – Packaging

IMPLEMENTATION ISSUES

Potential Key Players

Player:	*Role:*
Federal/Provincial Government	• Research support
Provincial Aboriginal Tourism Body	• Assist in designing a framework for packages; bringing tour operators together and working with local communities to unite operators.
Other Provincial Industry Associations	• Identify possible hotel and other tourism partners.
CVB's	• Identify marketing issues and avenues. Facilitate the package development to create interesting packages at prices that will entice visitors from local and international markets.
Canadian Tourism Commission	• Information on how to develop effective packages and price points. See study entitled "Packaging and Marketing Festivals and Events".

Marketing Issues

Objective:	*Challenge:*	*Actions:*
• To enhance visitation to aboriginal tourism sites and products.	• Limited awareness of Aboriginal tourism products.	• Develop a marketing strategy for aboriginal tourism and packaging.
• To increase the number of pre-packaged aboriginal tours.	• Facilitate cooperation among aboriginal businesses	• Develop local tourism associations or CVB's. • Increase participation in an Alberta wide aboriginal tourism body. • Demonstrate economic benefit of partnering and packaging
• Appropriate package development.	• Different market segments and needs.	• Packages could be built around sub-themes that are relevant to target markets like: o Eco-tourism – hiking, kayaking, canoeing, camping o Adventure – hunting, rafting, trail riding o Culture and history – visiting museum, powwow, sweat lodge, dining o Experiential/learning – dance, native cuisine, interactive interpretative centre

Potential Partnerships

Partner:	*Relationship and Role:*
Fed. Government and other aboriginal economic development agencies	• Funding Support
Travel Alberta/ATTC	• Marketing Support
CVB's	• Assist with Package development and ideas
Local bands or tourism associations	• Coordinate with local operators to identify package opportunities in the area.

Product Opportunity 4 – Packaging

Costs	
Order of magnitude costs	• Generally speaking, the costs of packaging are fairly minimal compared to other product opportunities. The costs are limited to marketing costs and can often be allocated from an existing budget. Depending on the level of participation and degree of marketing the cost per operator will likely be less than $15,000. It should be noted that this is an on-going cost that would be incurred on an annual basis. • The cost is limited only by the operators' willingness to contribute and the return on investment an operator receives. Costs could be as low as a few thousand dollars. • The conduct of a packaging study may also be warranted. Depending on the scope of the study, the estimated cost is between $50,000 to $100,000.

Infrastructure Considerations	
Change Needed:	*Action:*
CVB or VIC	• Local communities to establish better coordination and representation to assist with packaging and marketing.

COMPARABLES

Comparable	*Location*	*Size*	*Description*
Chapoose Canyon Adventures www.chapoose.com/deso.html	Green River, Utah, USA	10 people per trip	Family river-rafting adventure through tribal lands to view ancient cultural items and rock art, abandoned ranches, and wildlife
Toledo Eco-tourism Association http://www.belizehome.com/toledomaya/	Belize, Central America	N/A	Jungle experiences with 9 linked Mayan villages, includes ruins and cave exploration, arts and crafts, village tours, music dancing and story-telling
Kispiox Adventures & Skeena Expeditions www.kispioxadventures.com/	Northwest British Columbia	A company of Gitxsan guides	Explore traditional territory and observe culture. Trips are geared towards the average visitor and excursions are paced according to individual adventure level. • Cultural - Kispiox Village Tours, Totem Poles, Salmon Barbecues • River Drifting Trips • Hiking Trips - Guided • Fishing - Guided Fly Fishing • Boating - Canoe Rentals

Product Opportunity 4 – Packaging			
Wolf Creek Indian Village and Museum www.indianvillage.org/index.html	Bastian, Virginia USA	Costumed villagers	• Visit the Indian Village • See Native American crafts demonstrated • See artefacts in the Museum • Walk on beautiful nature trails • Students can fashion beads from clay
NEXT STEPS TO BRING TO MARKET			
• Gather information from CVB's/CTC on package development and success factors. • Develop framework for packages/possible options that are consistent with target markets identified in this report. • Approach individual businesses to determine their level of support/commitment. • Design/develop specific package components and pricing/brochures.			

Product Opportunity 5 – Re-enactive / Interactive Villages	
OPPORTUNITY POSSIBILITIES	
Concept 1:	**Interactive Village**
Opportunity Overview	• This attraction would essentially consist of an aboriginal settlement recreated to reflect an actual settlement as it may have stood in a chosen time period. • The village would be designed to provide visitors with the opportunity to see the aboriginal way of life in the chosen period. Elements that might be portrayed include living conditions, daily tasks, roles of different members of the tribe, diet, processes for making/preparing things and more. • Visitors should feel as though they participated in an authentic experience. • An example would be a full recreation of a village where staff play the role of different tribe members going about their daily routine. Visitors would walk around the village and interact with the various characters who would explain what their role is, what it is they are doing and explain any special processes or rituals around what they do. It would be similar to a pioneer village such as Upper Canada Village in Ontario. • The attraction may also incorporate plays, dances, interpretive signage and technology to help better tell the story. • Visitors may be offered the opportunity to participate in some activities such as cooking, helping to build a canoe, dog sledding, building a tipi and visiting a sweat lodge, giving them a hands-on learning experience.
Potential Operators	• Would likely be a new development, run by one of the Bands either on or off reserve. Could also be an expansion/addition to an existing complementary attraction. • Should be situated close to accommodation, dining and other activities to create a "critical mass" of activities.

PRODUCT OPPORTUNITY 5 – RE-ENACTIVE / INTERACTIVE VILLAGES		
Location	• South/central location such as the Kananaskis/Foothills area, Chinook Country, Waterton or on the outskirts of Calgary or Northern Alberta/Jasper area.	
Timing	• 3 to 5 years	
IMPLEMENTATION ISSUES		
Potential Key Players		
Player:	*Role:*	
Federal Provincial Government	• Facilitate the feasibility and development/RFP process. • Assist in partner relations and working with other government departments. • Assist in obtaining funding.	
Provincial Aboriginal Tourism Body	• Assist in identifying possible locations and partners/aboriginal operators. • Concept development.	
Provincial Government Agencies	• Identify possible locations and specific opportunities.	
CVB's and Provincial Aboriginal Tourism Body	• Marketing support and coordination of Aboriginal tourism in Alberta Marketing and awareness building, potential packaging opportunities.	
Marketing Issues		
Objective:	*Challenge:*	*Actions:*
• To create awareness for the development • Target new markets	• Weak awareness for aboriginal tourism in the Province. • Current marketing is fragmented and limited.	• Create a stronger, centralized marketing organization for aboriginal tourism. • Should be an internet based marketing strategy. • Work with CVB's, Travel Alberta and the Local hotel associations to assist in awareness building.
• Create a critical mass of attractions/activities by partnering with other products.	• To attract the appropriate product partners.	• Use an organization like an Alberta wide aboriginal tourism body to facilitate process and create framework for packaging.
• Focus on the most important segment for the product – you will get the biggest return on investment by focusing your spend on the important segments.	• For example, Germans and other Overseas visitors are interested in learning about authentic aboriginal culture. They are the most likely to visit a cultural centre/ interactive centre.	• Conduct research into their media habits of these segments – what magazines do they read; internet sites.
Potential Partnerships		
Partner:	*Relationship and Role:*	
Fed./Prov. Government and other aboriginal economic development agencies	• Funding Support	
Travel Alberta/ATTC	• Marketing Support	
CVB's	• Marketing Support	
Operational Issues		
Issue	*Action*	
Band Politics	• Demonstrate economic benefits of tourism.	
Environmental Issues	• Work with Parks and other agencies to minimize impacts. Conduct an	

<table>
<tr><th colspan="4">PRODUCT OPPORTUNITY 5 – RE-ENACTIVE / INTERACTIVE VILLAGES</th></tr>
<tr><td></td><td colspan="3">environmental impact assessment study as part of the feasibility process.</td></tr>
<tr><td>Staff training/resource capability</td><td colspan="3">• An Alberta wide aboriginal tourism body to provide access to training programs together with educational institutions.
• Recruit aboriginals into SAIT/NAIT hospitality programs at educational institutions.
• Federal government programs.</td></tr>
<tr><td>Packaging</td><td colspan="3">• Work with a central marketing organization like an Alberta wide aboriginal tourism body or the CVB's to assist in bringing players together.</td></tr>
<tr><td colspan="4">Costs</td></tr>
<tr><td>Order of magnitude costs</td><td colspan="3">• Depending on quality, industry average ranges from $76 per sqft. to $187 per sqft. Average cost for this type of building is $102 per sqft. according to the Marshall & Swift Cost Manual.
• Cost will also vary depending on the number and type of exhibits.</td></tr>
<tr><td colspan="4">Infrastructure Considerations</td></tr>
<tr><td>Change Needed:</td><td colspan="3">Action:</td></tr>
<tr><td>CVB and VIC's</td><td colspan="3">• Need local coordination and representation for packaging and marketing efforts, as well as for delivery of programs for training and education.</td></tr>
<tr><td>Signage</td><td colspan="3">• Provincial and Federal governments in conjunction with Travel Alberta to assist attraction in the development of appropriate signage.</td></tr>
<tr><td colspan="4">COMPARABLES</td></tr>
<tr><td>Comparable</td><td>Location</td><td>Size</td><td>Description</td></tr>
<tr><td>Tamaki Maori Village

www.maoriculture.co.nz/index.html</td><td>South of Rotorua, New Zealand</td><td>Accommodates overnight groups of up to 60</td><td>Sacred performances, overnight stay in Maori village with cultural experiences and meals, small group arts and craft workshops and Marketplace</td></tr>
<tr><td>Metlakatla Tours

http://tours.metlakatla.net/index.html</td><td>Alaska, Metlakatla Village
Weat Side of Annette Island</td><td>Full service tour</td><td>Dinner of Fresh Alaska Salmon baked over an Alder
Lively Tribal dance performance in full regalia at the long house
Meet famous Tsimshian artists and craft makers
Tour Alaska's only native Reserve with a local Tribal member as your guide</td></tr>
<tr><td>Wanuskewin Heritage Park
www.wanuskewin.com/</td><td>Opimahaw Valley, South Saskatchewan River
Saskatchewan</td><td>Large Tipi Village</td><td>Total live-in First Nations cultural experience. History, dancing, archaeological, dining included</td></tr>
<tr><td>'Ksan Historical Village and Museum

www.ksan.org/village.html</td><td>Hazelton, British Columbia</td><td>N/A</td><td>Replicated ancient Gitskan village, theater, museum
Performing arts group conducts an ancient Potlach ceremony and feast in which the guests participate</td></tr>
</table>

PRODUCT OPPORTUNITY 5 – RE-ENACTIVE / INTERACTIVE VILLAGES
NEXT STEPS TO BRING TO MARKET
• More detailed inventory and feasibility study and concept development • EAI assessment • Build the business case for investment in tourism infrastructure as a means of creating jobs and new businesses which are environmentally friendly. • Identify potential partners and funding organizations

Implementation Summary

The aboriginal tourism industry in Alberta is at an early stage in its development. To grow, it must adopt a strategy to gradually improve its coordination, co-operation and marketing efforts as well as its overall product offering. Alberta currently has a number of strong aboriginal tourism sites and areas. However, operators and aboriginal owners need to work together and become more closely aligned to bring the industry together and to leverage marketing efforts.

The aboriginal tourism owners clearly need to take more of leadership role in growing the industry. One recommendation might be for each band or local area with an interest in aboriginal tourism, to create their own aboriginal tourism organization or “CVB”. This group would act as the central body for that region to market, coordinate and package their activities and products. A broader, provincial organization would also exist (similar to Travel Alberta) to bring together all of the CVB’s under one umbrella. This central body would be responsible for coordinating amongst the local organizations, marketing Alberta as a destination for aboriginal tourism and assisting with capability development such as resource training and marketing. Both ABC and AED can then help to facilitate and work with the various aboriginal tourism groups and the overseeing body to identify specific product opportunities and provide them with the resources they need to help develop the opportunity.

The bottom line is that for the aboriginal industry to grow, buy-in and consensus among the various players (aboriginal operators, bands, chiefs etc.) is critical. The major challenges of marketing, training, social issues and education also need to be addressed. However, given recent travel research that shows a high degree of interest in aboriginal tourism and authentic experiences, and Alberta’s strong product base, it clearly makes sense to make an effort to grow the industry and attempt to bring the various groups together.

The Alberta aboriginal tourism industry can learn from other destinations like British Columbia, NWT, Ontario, Montana, South Dakota, Utah, New Mexico etc. to understand how the native people representing those areas have developed their tourism industries.

6. Conclusions

A number of key findings have been presented throughout this report. Following is a brief summary of the key conclusions:

- There is significant demand for aboriginal tourism products globally, and Alberta is well positioned to capitalize on many of the major travel trends of European, Asian, American and domestic cultural visitors.
- A good base of aboriginal tourism products already exists throughout the province. However, due to a lack of coordination among operators and a lack of understanding by some members of the community of the benefits of tourism, much of this product is not market ready. While operators compete against one another for business on a provincial basis, they need to work together to compete against out-of-province destinations. By working together, they can promote an image of abundant aboriginal tourism product and achieve the critical mass necessary to attract long-haul visitors.
- While there are no major holes in the "hard" infrastructure, there are some serious issues around the "soft" infrastructure. More specifically, two major issues exist. First, there is a lack of trained staff to run the operations — tourism based training is a must if the industry is to get off the ground. Second, there is a need to improve marketing, particularly at the industry-wide level.
- Several key actions were identified as being critical to industry survival. Specifically, the industry needs to:
    - develop a vision and long-term marketing strategy for the industry;
    - develop a communications plan to enhance the understanding of the benefits of tourism within the aboriginal community; and
    - develop training programs for tourism industry staff.
- Based on a product-market match, specific product opportunities for the Alberta aboriginal tourism industry include:
    - aboriginal themed accommodation;
    - aboriginal themed restaurant;
    - aboriginal cultural centre;
    - packaging opportunities; and
    - re-enactive/interactive villages.
- The aboriginal tourism industry in Alberta is at an early stage in its development. To grow, it must adopt a strategy to gradually improve its coordination, co-operation and marketing efforts as well as its overall product offering.
- The bottom line is that for the aboriginal industry to grow, buy-in and consensus among the various players (aboriginal operators, bands, chiefs etc.) is critical. The major challenges of marketing, training, social issues and education also need to be addressed.

- The Alberta aboriginal tourism industry can learn from other destinations like British Columbia, NWT, Ontario, Montana, South Dakota, Utah, New Mexico etc. to understand how the native people representing those areas have developed their tourism industries.

As mentioned at the outset of this report, the intent of the study is to provide a foundation for moving the Alberta aboriginal tourism industry forward so that it can compete for tourists with other aboriginal culture destinations. The report is not intended to provide a detailed business plan; rather it provides a starting point for industry stakeholders. There is still much work and research to be done before any of the opportunities can be brought to market. It is now up to industry stakeholders to grab hold of these opportunities and make the industry world-class.

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