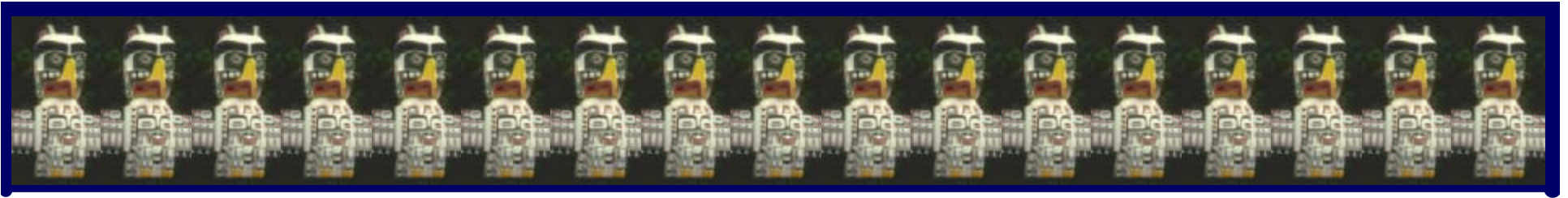


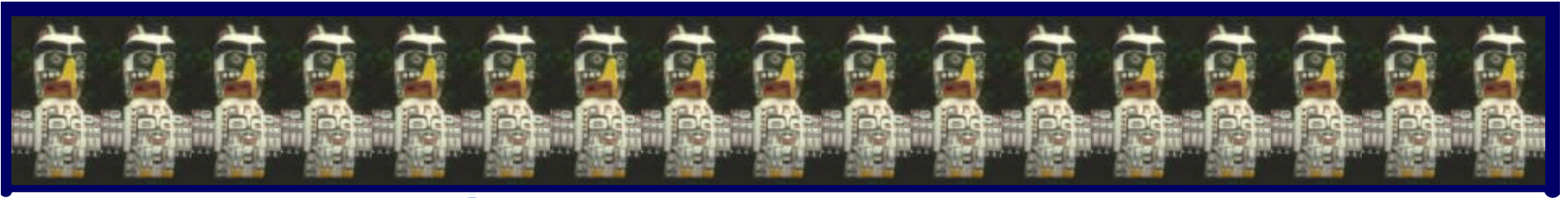
# Demand For Aboriginal Culture

transforming results  
**PWC CONSULTING**



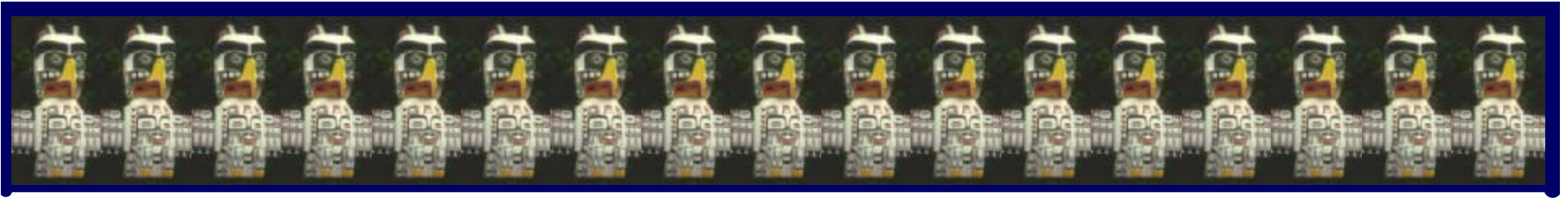
## Two Target Markets Have Been Identified

- **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. Exact definitions vary by market.



## Three Geographic Target Markets Have Also Been Identified

- The Short-Haul Market
- The Long-Haul North American Market
- The Long-Haul Overseas Market



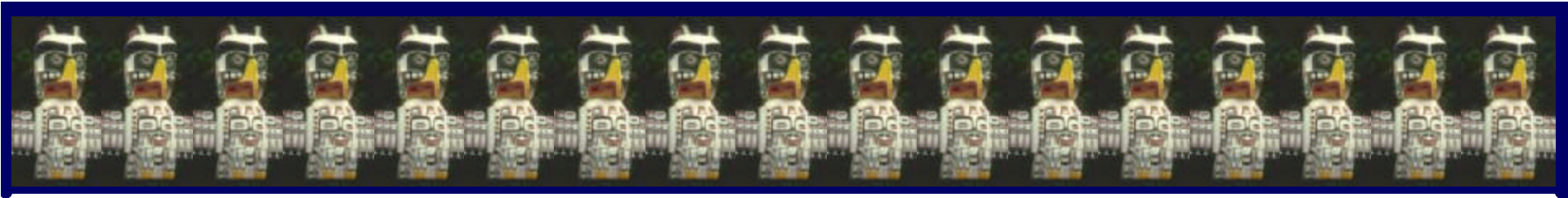
# The Short-Haul Market

- The Short-Haul Market encompasses Alberta and its border provinces / states – i.e., British Columbia, Saskatchewan, NWT/Nunavut, Yukon and Montana

## 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
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
<b>Total Short-Haul Market</b>	<b>5,325,000</b>	<b>406,000</b>	<b>525,000</b>	<b>187,000</b>	<b>283,000</b>	<b>\$41.0</b>	<b>\$53.8</b>



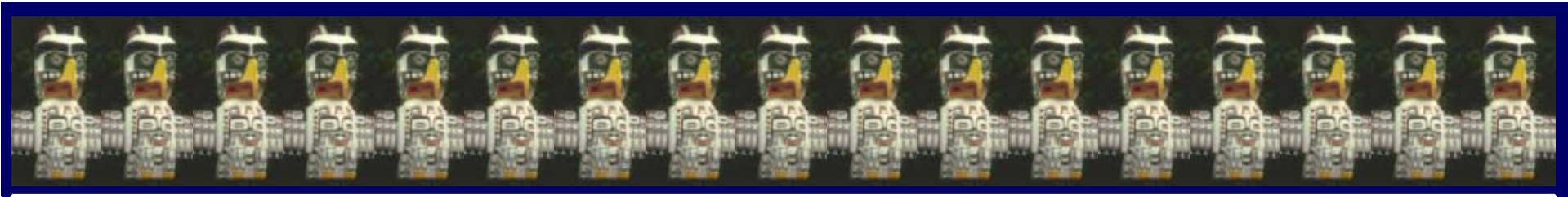
# The North American Long-Haul Market

- 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

## 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
<u>Canadian Market:</u>							
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
<u>U.S. Market:</u>							
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
W. 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
W. 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
<b>Total N. Amer. Long-Haul Market</b>	<b>187,181,000</b>	<b>17,286,000</b>	<b>19,619,000</b>	<b>802,000</b>	<b>875,000</b>	<b>\$448.4</b>	<b>\$487.7</b>



# The Long-Haul Overseas Market

- The Long-Haul Overseas Market is defined as all regions outside of Canada and the United States.

## Market Potential

	Population			Interest in Visiting Canada in the Next Five Years		Potential Expenditures (in millions)	
	Long-Haul Traveller Pop.	Aboriginal Culture Traveller	Culture Traveller	Aboriginal Culture Traveller	Culture Traveller	Aboriginal Culture Traveller	Culture Traveller
<u>Europe:</u>							
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
<u>Asia-Pacific:</u>							
Japan	26,128,000	1,045,000	4,180,000	902,000	2,797,000	\$999	\$3,099
Taiwan <sup>3</sup>	3,269,000	294,000	n/a	680,004	n/a	\$83	n/a
Australia	4,404,000	925,000	n/a	5,920,004	n/a	\$753	n/a
Hong Kong <sup>3</sup>	2,418,000	532,000	n/a	362,000	n/a	\$445	n/a
<b>Total Long-Haul Overseas Market</b>	<b>87,307,000</b>	<b>18,437,000</b>	<b>10,882,000</b>	<b>11,400,000</b>	<b>6,628,000</b>	<b>\$12,391</b>	<b>\$7,364</b>

