

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

¹Note: 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 dining 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 Infrastructure¹ (Use a 1-5 scale, where 5 means "strong" and 1 indicates "very weak")
Education and Training	<ul style="list-style-type: none"> • Limited skilled resources. • Poor attitudes. • Limited understanding of how the industry works. 	1.6
Marketing/ VIC's	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Most TDRS have excellent road coverage. Some limited access to remote areas in Northern Alberta. • Sufficient air service 	3.6
Accommodations	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Usually combined with a hotel or other attraction (i.e., Chief Chiniki) 	3.2
Technology	<ul style="list-style-type: none"> • 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

¹Note: 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.