

Aboriginal Tourism Opportunities for Canada

U.K., Germany, France

Prepared for:
The Canadian Tourism Commission (CTC)

By:  **insignia**
Research • Knowledge • Strategy



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Foreword

Background

The CTC has identified Aboriginal tourism as one of six strategic issues with potentially significant implications for Canada's tourism industry.

An omnibus survey conducted for the CTC last August concluded that the UK, Germany and particularly France are all strong markets for Aboriginal tourism in Canada and all show growth potential for long-haul travel involving Aboriginal tourism experiences. Europe was identified as a priority for further market research to define interest in Aboriginal products and to access the demand for Aboriginal travel to Canada.

Efforts brokered by Aboriginal Tourism Canada since May 2007 have led to the creation of a multi-provincial partnership to undertake this project. The partners include the CTC, Aboriginal Tourism Canada, Alberta Tourism, Parks, Recreation and Culture, Northwest Territories Tourism, Tourism Saskatchewan, the Ontario Ministry of Tourism and Recreation, and Atlantic Canada.

Research Objectives

The research objectives of this project were to establish the demand for Aboriginal tourism products in Canada, and, then, to provide the CTC and its partners with all the essential elements required to create an accurate and effective business plan.

That required the following:

1. European Demand for Aboriginal Tourism

- How large is the market in U.K., Germany and France?
- Can Aboriginal tourism experiences become significant motivators or "triggers" to want to visit a country?
- How does Canada stack up against other destinations like Australia and the U.S. in terms of awareness, perceptions and interest?

2. Which Canadian Aboriginal Product Can Drive European Visitation?

- How do Aboriginal experience seekers react to examples of Canadian Aboriginal product?
- Which ones excite them and why?
- Which ones are less relevant to the European market and why?
- What are their concerns?

3. Underlying Emotional Needs

- What are the underlying emotional needs of Aboriginal experience seekers?
- Are there elements of self-discovery? Getting in touch with one's past? Feeling a measure of historical authenticity?
- Which of these emotions trigger the most excitement and become core elements of product positioning in Europe?
- What kinds of physical involvement is required?

4. Profiling Key Prospects

- What are their demographics?
- Where do they seek information on Aboriginal experiences (e.g., special websites, associations, groups)?
- What are their media habits?
- How can they be reached cost effectively?

5. Trade Support

- What are the perceptions of each layer of the trade – including Canadian Specialists, tour operators/wholesalers, receptives?
- Are they skeptical? Supportive?
- What is their existing knowledge?
- What is their reaction to examples of current Canadian Aboriginal product?
- Which cues excited them and why?
- Which cues are less saleable and why?
- What trends are developing in the market for Aboriginal tourism and how can Canada capitalize on those trends?

Methodology

Phase One: Mining the Current European Segmentation Study

We examined the current European Segmentation study data in-depth to capture as much insight as possible on the size and nature of the potential market, as well as to determine the target for the follow up survey.

Phase Two: Follow up Consumer Online Survey

Respondents from the European Segmentation study who claimed they are interested in a near term trip to Canada and are specifically interested in “Aboriginal cultural experiences, celebrations and attractions” on their ideal trip to Canada were re-contacted for a follow up survey between November 28 to December 5, 2007.

In total n=1,537 interviews were conducted, broken down as follows:

U.K.	Germany	France
N=507	N=509	N=521

The average duration of interview was 15 minutes. Detailed tables are available in a separate file. The questionnaire is appended for reference.

The average error range with a sample of 500 is $\pm 4.5\%$. This means that in 19 out of 20 cases, the results based on a sample of 500 will differ by no more than 4.5% from what would have been obtained by interviewing all consumers who meet the qualification criteria in the markets surveyed.

Phase Three: Long-haul traveller Focus Groups

In order to gather insights and context to the quantitative survey a total of 6 mini-focus groups were conducted among long-haul travellers in all 3 countries – UK, Germany and France.

2 groups were conducted each in London, Frankfurt and Paris. All participants had either travelled internationally in the past 3 years or had plans to travel internationally in the next 2 years, but they had **not** yet travelled to Canada, and were not rejecters of Canada. These groups were made up of a mix of males and females but split among age, with one of the groups being younger (30 to 49) and one being older (50 to 69).

All respondents must express interest in seeing and participating in **Aboriginal** culture attractions, celebrations and experiences.

The discussion guide is included in the appendix of this report.

Phase 3: In-depth Interviews with the Travel Trade

In total, 45 interviews were conducted among the trade across the 3 markets, with the following breakdown:

- 15 Interviews with Tour Operators
- 15 Interviews with Canada Specialist Agents
- 15 Interviews with In-Market receptives

The interviews lasted, on average, between 30 and 45 minutes.

A discussion guide is included in the appendix of this report.

Key Findings

Answers to Specific Research Objectives

European Demand for Aboriginal Tourism

How large is the market in the U.K., Germany, and France?

The market for Aboriginal tourism in these countries is substantial.

France	85%
Germany	72%
The U.K.	46%

(Percentage of potential travellers to Canada interested in Canadian Aboriginal products)

Can Aboriginal tourism experiences become significant motivators or “triggers” to want to visit a country?

Aboriginal tourism experiences can be highly motivating, but serve more as a value added than as a trigger to want to visit most destinations.

How does Canada stack up against other destinations like Australia and the U.S. in terms of awareness, perceptions and interest?

Australia is very strong in promoting and supporting its Aboriginal travel products. In comparison, both Canada and the US are weak in terms of awareness and clarity. That said, remarkably this does not reduce interest.

Which Canadian Aboriginal Product Can Drive European Visitation?

How do Aboriginal experience seekers react to examples of Canadian Aboriginal product?

European Aboriginal experience seekers are very clear on what they want and do not want in terms of Aboriginal travel products. Products that include their participation and provide enriching experiences are highly valued, while products that are entertainment oriented and distance the traveller from the Natives are of lesser value and interest.

Which ones excite them and why?

Aurora Village and Moccasin Trail Tours are of most interest as they engage the traveller and make them feel that they will have “discoveries” and “adventures”. Blackfoot Crossing Historical Park has potential, but is weighted a little too much toward staged events and presentations.

Which ones are less relevant to the European market and why?

The remaining four are less relevant, mainly because they lack compelling and authentic traveller-Native interaction, especially with regards to outdoor/nature activities.

What are their concerns?

Their concerns centre on previous bad experiences with Aboriginal travel where they have been made to feel unwanted and as spectators, mainly there as an opportunity for the Aboriginals or the coordinators to make money and to sell souvenirs.

Underlying Emotional Needs

What are the underlying emotional needs of Aboriginal experience seekers?

The overall need for these travellers is to have a sense of discovery and adventure. In the context of Canadian Aboriginal travel, this means authentic interaction with natives guiding them through Canada's beautiful and scenic nature.

Are there elements of self-discovery? Getting in touch with one's past? Feeling a measure of historical authenticity?

These travellers are relentless in achieving self-discovery through Aboriginal travel, and therefore are demanding in terms of authenticity and scrutinize products thoroughly. This is because they know that a good experience in Aboriginal travel will lead to self-discovery, due to the self-reflection these kinds of trips create. Of the three countries surveyed, only the French link it to their past from the perspective of French explorers encountering Natives in North America.

Which of these emotions trigger the most excitement and become core elements of product positioning in Europe?

The opportunity to feel something different and do something different in a unique environment through a unique culture is the strongest emotional trigger.

What kinds of physical involvement is required?

The younger targets (those under 50) have more enthusiasm for physical involvement, including canoeing, kayaking, dog-sledding, horseback riding, whitewater rafting, etc. Those over 50 are more interested in softer activities like hiking, walks, nature observation, and indoor activities.

Profiling Key Prospects

What are their demographics?

The profile index is higher on being married, no children, better educated.

Where do they seek information on Aboriginal experiences (e.g., special websites, associations, groups)?

Generally they don't seek information on Aboriginal tourism. Usually they investigate it when they are at the destination.

What are their media habits?

Source media most likely to be used for Aboriginal tourism products are the Internet, word of mouth, and magazines.

How can they be reached cost effectively?

Through a combination of Internet based media: national, provincial, and product websites; permission e-mails; YouTube videos; podcasts; etc.

Trade Support

What are the perceptions of each layer of the trade – including Canadian Specialists, tour operators/wholesalers, receptives?/Are they skeptical? Supportive?

Generally very supportive and interested in the case of the inbound receptives and Europe-based tour operators. Knowledgeable travel agents were very supportive, while those with no knowledge indicated they had little or no demand for Aboriginal tourism.

What is their existing knowledge?

Most of the inbound receptives and Europe-based tour operators had fair to good knowledge of Canada's Aboriginal tourism products as many have included Aboriginal attractions within package itineraries. The majority of travel agents had little or no knowledge of and experience with Canada's Aboriginal tourism sector.

What is their reaction to examples of current Canadian Aboriginal product?

Those who had included Aboriginal tourism products in Canadian tours and packages had mixed reactions -- in some cases it was very positive and they were impressed with the quality and authenticity; in other cases where they have had a poor experience (lack of good product delivery) they were concerned that the products may not yet be market-ready.

Which cues excited them and why?

They were most impressed with experiential products where there is an opportunity to participate in traditional activities with Aboriginal people. They are still impressed with traditional regalia, although recognize that this is only worn on ceremonial occasions or for special performances and competitions such as pow-wows.

Which cues are less saleable and why?

They react very negatively to anything that seems artificial or overly staged specifically for visitors. They are very negative towards “fake” crafts and souvenirs (e.g.- made in China).

What trends are developing in the market for Aboriginal tourism and how can Canada capitalize on those trends?

Continued growth in the mature travellers market, which is the key market segment for Aboriginal tourism, is seen as a strong positive trend, as well as the desire for more experiential vacations. Canada must create a much stronger awareness of its Aboriginal tourism experiences and how they are uniquely different from those of other countries and work to improve product quality where it is not yet market-ready.

Summary

There is significant opportunity for both Aboriginal tourism and Canadian tourism to support and further develop Canada’s Aboriginal tourism from the UK, Germany, and France.

Despite low awareness and unfamiliarity with the product, among prospective future Canadian visitors interest in the opportunity to participate in Canadian Aboriginal tourism is remarkably high:

France	85%
Germany	72%
The U.K.	46%

This appetite for Canadian Aboriginal tourism is driven by a combination of the generic desire to understand a unique culture and a belief that Canada could have some excellent Aboriginal tourism products (albeit vaguely formed in potential travellers’ minds).

Barriers

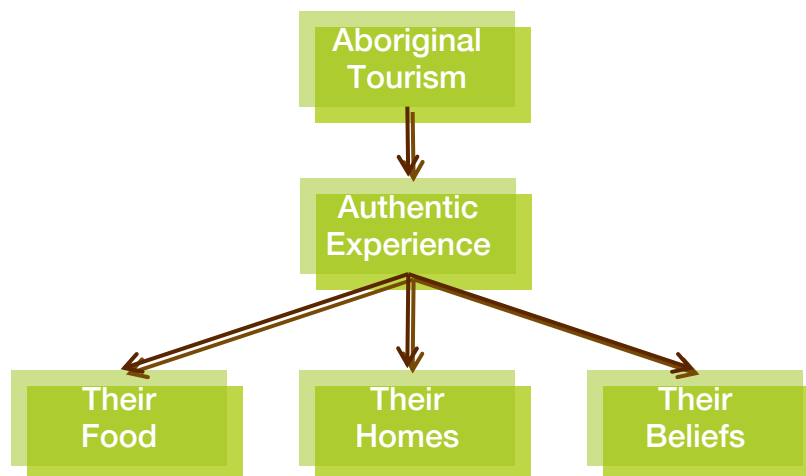
The most significant barrier for Canada's Aboriginal tourism is top of mind awareness. When thinking about Canada, Aboriginal tourism rarely comes to mind. Instead, visions of vast and wild nature, the Rockies, lakes and waterfalls, etc. are front and centre. Therefore, potential travellers typically don't even think about Aboriginal tourism when they are planning a trip to Canada.

A second barrier was uncovered in the focus groups. Participants said they felt as if their visits may be unwanted by Aboriginals. They got this impression from the fact that they rarely saw ads for Canadian Aboriginal products, and when they did see ads they could not be sure if it was actually the Aboriginals "pushing" the product or not. Given the history of Europeans "forcing themselves" on Natives, there was a sense that Canadian Aboriginals might not want tourists to visit.

Reasons to Hesitate on Canadian Aboriginal Travel

For those interested in Aboriginal travel generally, a particular thought process is engaged in when they hear about it.

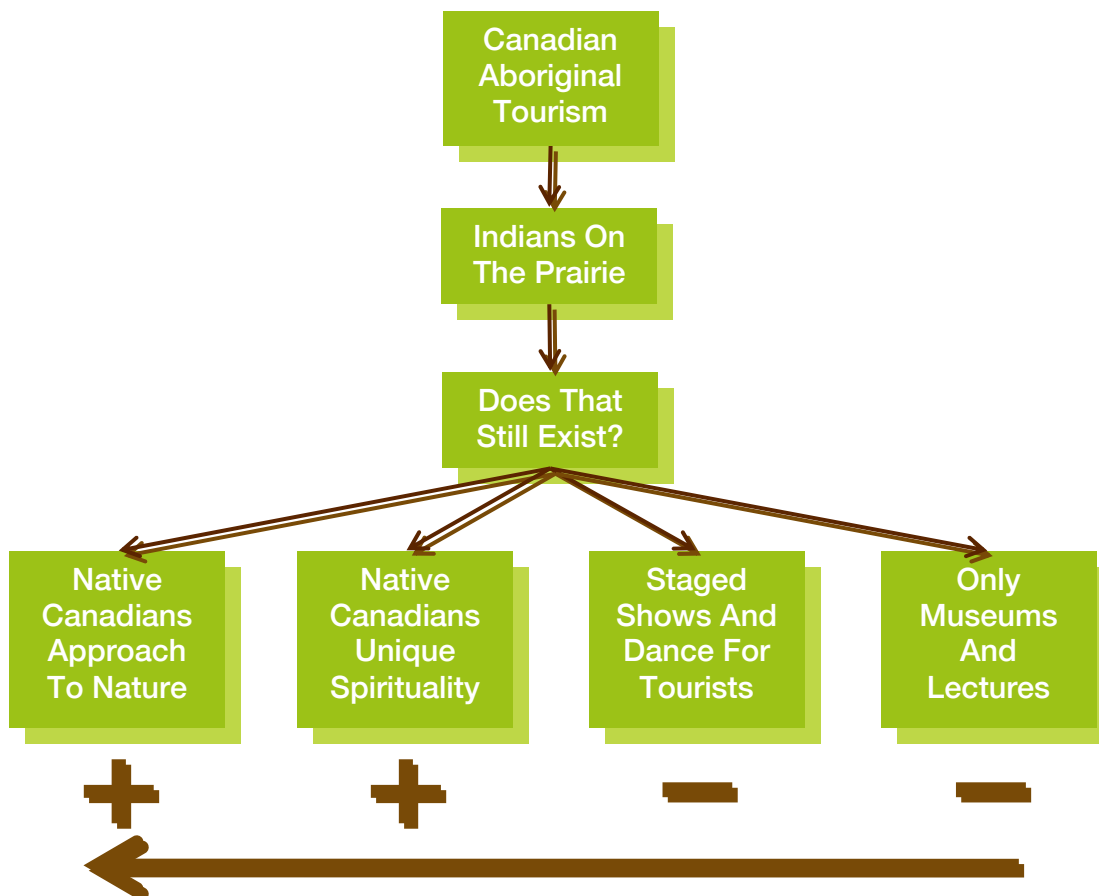
In general, they begin to think about an idealized version. They imagine themselves as explorers, who will go and interact with Native people and observe them, live in the way they live, and learn from them. It focuses a great deal on their preconceived notions of Aboriginal travel, but always focuses on authenticity and tradition.



However, this process is sidetracked in the Canadian Aboriginal tourism context. This is due to the fact that they realize that their initial thoughts may be out of date—focusing on Indians wearing animal skins and riding horses across the prairies. As a result, they begin to suspect that there may not be many authentic Aboriginal experiences left today.

The thought process for Canadian Aboriginal travel follows the flow chart below. There is the distracting worry about the fact that the native lifestyle no longer fully exists and that, as a result, there may too many “staged” or “fake” elements.

Thus, negative “fake” aspects are thought of alongside positive authentic ones.



The will often cause the traveller to prefer to wait until they get to the destination to explore Aboriginal products, as opposed to booking them while planning. By being in the destination they can get a better sense of the product and not be “taken in” by a “tourist trap”.

Draws

The main draws, in the absence of concrete products, are based on travellers' knowledge that Aboriginals in Canada commune closely with nature and therefore they could provide insights, perspectives, or aspects of nature that are unique from other Canadian tourism products.

Perceived Value of a Trip to Canada

Aboriginal travel is not a driver to Canada, but a value-added. People travel to Canada because of its “must sees”—vast nature, wild animals, Niagara Falls, etc. By including Aboriginal travel, the “must sees” are perceived to be enhanced through Aboriginals providing a unique perspective on nature, as well as more perceived “discoveries” and “adventure.”

The Positioning of Canadian Aboriginal Tourism

The European market demands authenticity in Aboriginal travel. When there is the potential for top of mind awareness to draw early conclusions of “fake” and “staged”, as in the case of Canada, it is very important to highlight the authentic position of the Aboriginal cultural product.

The most desired benefits of Canadian Aboriginal travel fall under “discoveries” and “adventures”. Specifically, this centres on connecting to nature, a purer life style, a more spiritual existence, and gaining an immersive understanding of a very different way of life.

This implies extended and direct contact with Natives living their natural life style in an authentic situation:

***Experience Canada’s greatness through our
Aboriginals’ unique lifestyles and perspective.***

Review of Concepts

To support the above positioning are the reactions to the 7 concepts explored in this research.

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK (507)	Germany (509)	France (521)
Extremely/Very Appealing	%	%	%
Aurora Village	76	86	82
Moccasin Trail Tours	53	78	65
Haida Heritage Centre at Kaay Lingagaay	47	65	50
Blackfoot Crossing Historical Park	45	68	53
Wanuskewin Heritage Park	42	69	48
Metepenagiag Heritage Park	33	64	45
Hotel-Museum Wendake	33	54	38

Both Aurora Village and Moccasin Trail Tours are strong on “discoveries” and “adventure”, and integrate the traveller into the Aboriginal culture.

Haida Heritage Centre at Kaay Lingagaay does this less well by introducing perceived stage shows and arrangements.

The remaining concepts were considered to be too heavily weighted toward shows and museum like lectures and exhibits to fulfill the travellers' desire for "discoveries" and "adventure".

Improvement to the Concepts

The heritage centre/park concepts would benefit if they also included opportunities for tourists to have authentic interaction with Canada's Aboriginals. Therefore, in most cases the cultural centres need to take backstage to activities and adventure in the areas that surround the centre.

These centres can be made more attractive and valuable when positioned as a facet of the product, but not the entire product by itself. There must be an Aboriginal interaction aspect to the product.

Terminology

In all three countries the term Indian is commonly used when referring to Canada's Aboriginals. For the most part there is little understanding that this is a politically incorrect title. The other term commonly recognized/used in these countries is "Natives".

Perceptions of Purchasing Canadian Aboriginal Products

At current levels of awareness, most travellers will seek out Aboriginal tourism product while visiting Canada, instead of arranging it in advance. The reason for this is lack of awareness prior to travelling and fear of what they are "really" buying when they purchase the product ahead of time.

Review of Trade

The European travel trade have already tapped into Canada's Aboriginal tourism product base and, particularly in the case of inbound receptive operators and European-based tour operators, they are fairly knowledgeable about what to expect. Only some travel agents have had exposure to Canada's Aboriginal tourism sector, so many had little or no knowledge about it. The travel trade findings were for the most part fairly similar for the U.K., German and French markets.

The key travel trade findings are as follows:

- The travel trade have a good understanding of what their customers are looking for in an Aboriginal tourism experience, which essentially mirror the findings of the quantitative survey and focus groups:
 - They want an authentic experience, not a staged show or artificial village.
 - They seek opportunities to meet and interact with Aboriginal people to experience how they live now and learn about their culture and traditions and how they lived in the past.
 - There is a strong desire to experience several aspects of Aboriginal culture including arts and crafts (viewing and making), dancing and drumming, ceremonies, pow-wows, and traditional subsistence activities (fishing, hunting, trapping, gathering).
- The travel trade for the most part were unclear on whether or not Canada's Aboriginal tourism products measure up to those of other countries, but there was a general sense that it may not.
- The image overseas of Canada's Aboriginals from the point of view of the travel trade was generally positive.
 - Those who have had direct experience have found the communities to be welcoming and the experiences provided often more authentic than in some other countries.
 - On the negative side, there have been concerns about product quality, product delivery and whether or not many of Canada's Aboriginal tourism products are market ready (they clearly feel some are not).
- The travel trade had some helpful suggestions of elements for positioning and portraying Canada's Aboriginal tourism experiences, such as the following:
 - Stressing the uniqueness of Canada's Aboriginal communities and how they are different from those in the U.S., New Zealand and Australia.
 - Emphasizing the authentic experiences available, particularly interactions directly with the Aboriginal people and participatory activities.
 - Highlighting how Aboriginal communities are very connected to nature, use plants for medicinal purposes, and still engage in traditional subsistence activities.
 - Unique opportunities to learn about their traditional way of life, local handicrafts, and cuisine.

- The European travel trade consider Aboriginal tourism to be a growth market for Canada, but note the following key barriers that must be addressed to achieve this growth:
 - Travel trade and, particularly, consumer awareness and understanding of Canada's Aboriginal tourism products and experiences needs to be greatly enhanced.
 - Many of Canada's Aboriginal tourism products and services must improve their quality, reliability and authenticity to be truly market-ready.
- Aboriginal tourism for the most part fits in well with broadly-based touring itineraries, adding a cultural dimension unique to Canada.
 - At the same time, there is a small European niche market for "Aboriginal-only" tourism packages and experiences.
- The travel trade offered a number of suggestions for how the CTC could strengthen marketing and promotion of this sector, such as:
 - Incorporating a lot more Aboriginal products, experiences and images into the overall marketing and promotion of Canada as a destination.
 - Strengthening the information and knowledge base of inbound receptives and Europe-based tour operators using a variety of tactics.
 - Seeding a lot more European travel media coverage of Canada's Aboriginal tourism sector.
 - Ensuring Aboriginal tourism operators directly participate in appropriate European travel trade shows and marketplaces.

Marketing Considerations

Given the high level of interest and low level of awareness, it is recommended that the CTC and its partners seriously consider supporting an Aboriginal tourism communications initiative.

This initiative initially needs to be directed toward consumers as the trade currently is not guiding consumers to this product without prompting from the consumer.

First and foremost, it is recommended to reassure tourists that they are welcome and wanted by Canadian Aboriginals. They need this message to come from the Aboriginal peoples; “we want visitors and tourists” needs to be heard directly from the Aboriginals.

It is also recommended to integrate Aboriginal product with mainstream Canadian product. This sends a message to the consumer that the two cultures work together and are not segregated. Also, by integrating the two, they can each build off each other and create a better value-added proposition for tourists.

Therefore, Aboriginal product and links to Aboriginal sites should be placed on both the CTC’s and the provincial websites. This will only serve as a reassurance value-added and provide additional dimension and variety to existing product. It can also extend length of stay by providing additional options to travellers.

Aboriginal product needs to be positioned in a genuine and authentic way. Travellers shy away from potentially artificial “Disney-like” Aboriginal product. Positioning and descriptors are very important, but the authenticity of presentation is crucial.

The core message is the integration of Aboriginal culture with Canada’s spectacular nature. This is the basis for the European fascination with Aboriginal lifestyle, philosophy, and culture, and this is the experience they are trying to buy.

Therefore it is recommended that product with cultural centres focus on these aspects as well, emphasizing a mix of actual outdoor activity with Aboriginals and the chance to explore and learn in depth about Canada’s Aboriginal people through the cultural centres.

What must be avoided entirely is sending any message (visual, print, etc.) that demonstrates inauthenticity. This can trigger an association with cheap mass produced “culture”, which is not an image that Canada normally conveys.

In addition to the consumer focus of Aboriginal tourism marketing, it will be helpful to ensure that Europe-based tour operators and inbound operators have a good knowledge of this product base and its potential to enhance tour itineraries and packages to various regions of Canada. Many of the in-market Europe-based tour operators are very good at doing their own consumer marketing throughout Europe, so it is essential to ensure they have all the information and tools to do this effectively.

The retail travel agents, on the other hand, are typically “order-takers” who respond to consumer demand. Any focus on promoting to this group should be restricted to the Canada specialist agents that show a strong interest in Aboriginal tourism.

Consumer Research

Section 1: Canada in Perspective

1.1 Unaided Awareness of Overseas Countries with Aboriginal Culture Attractions and Experiences

When Europeans think about Aboriginal cultural attractions and experiences, different destinations come to mind, depending on the origin market. For the British, Australia and New Zealand dominate. Unaided awareness for Canada is actually quite low. For the Germans, Australia followed by the U.S. and Mexico are most often mentioned.

Qualitatively, “Aboriginal” and “aborigine” are linked very strongly with Australia and New Zealand because these are the terms used to refer to native inhabitants of these areas, and has been for decades. The connection to Oceania has been so powerfully imprinted that, for most, Aboriginal most often means native of Australia or New Zealand, instead of a more general synonym for native.

“I think of the Maori, the people in the bush.”

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	U.K. (507) %	Germany (509) %	France* (521) %
Countries come to mind when thinking of Aboriginal culture			
Australia	85	49	N/A
New Zealand	45	16	N/A
Africa	13	14	N/A
USA	8	23	N/A
Canada	8	12	N/A
India/Sri Lanka	6	6	N/A
China	4	7	N/A
South America	4	10	N/A
Peru	2	9	N/A
Brazil	1	10	N/A
Mexico	1	21	N/A

Source: Follow-up Online Survey Q. 2

*France data unavailable for this question.

Q. 2 Which overseas countries come to mind when you think of Aboriginal cultural attractions and experiences?

1.2 Aided Association With Aboriginal Tourism Experiences

When provided with a short list of four destinations, Aboriginal tourism is most often identified with Australia, to a lesser degree with South East Asia, except in the case of France. Only one in four continental Europeans associate it with Canada, only one in ten among UK travelers.

The bottom line, then, is that, regardless of the interest level among Europeans discussed later, Aboriginal tourism in Canada lacks awareness or presence.

The focus groups showed that Australia has done an excellent job of integrating their Aboriginal products into their overall communications program. Reference to seeing Aboriginals or Aboriginal products in Australian advertising are very common. In contrast, it was felt that Canada does not feature Aboriginal products.

"They never refer to it."

"I would think the Indians don't want us."

A likely reason why Germany and France show greater awareness of Canadian Aboriginal products is that those markets have a greater appetite for the true Canadian outdoors, which links to Aboriginal products in Canada.

Percent Among Total Long Haul Travellers

	U.K. (2697) %	Germany (2548) %	France (2544) %
Aboriginal Tourism Applies Extremely Well To:			
Australia	60	62	46
South East Asia	17	35	57
Canada	9	22	28
United States	9	20	15

Source: European Segmentation Survey Q. 21

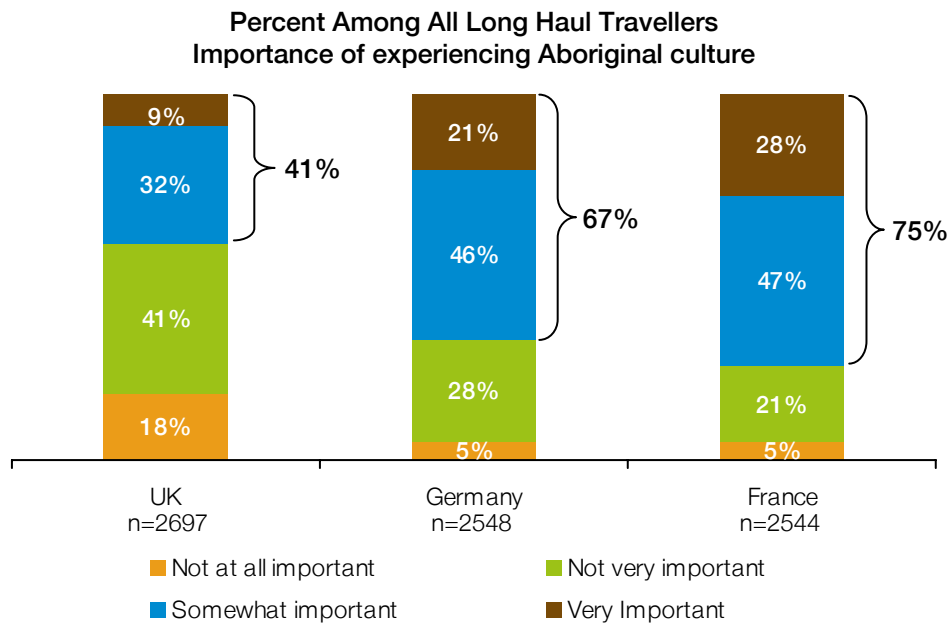
Q. 21 Which of these travel destinations does Aboriginal tourism apply extremely well?

Section 2: Global Product Interest

2.1 Interest in Aboriginal Attractions

From the European Segmentation Study, as many as 75% of French, 67% of German and 41% of UK long haul travelers claim that the opportunity to observe Aboriginal culture on a future overseas trip to any destination would be appealing.

Clearly, then, Aboriginal tourism is a product of interest to a great many long haul European travelers—especially the French and Germans.



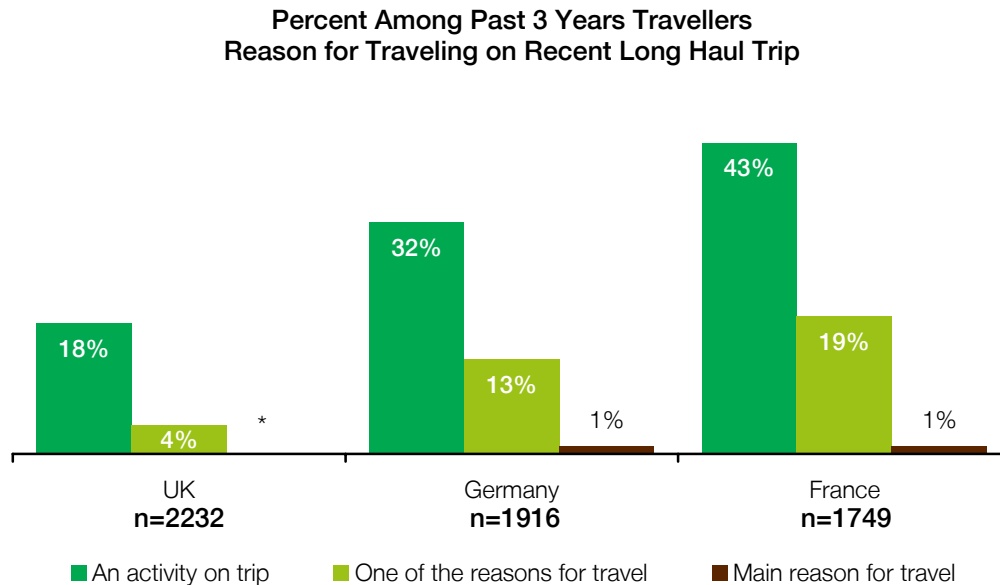
Source: European Segmentation Survey Q. 20

Q. 20 How important would Aboriginal culture be when considering a trip 3 nights or longer, overseas, with at least one night in paid accommodation.

2.2 Aboriginal Tourism Involvement in Current Travel

Reflecting high interest, seeking out Aboriginal cultural attractions on a recent long haul trip was fairly common by the French (43%) and the Germans (32%), less so among the British (18%).

However, those claiming that it was one of their motivations or reasons for travel on a recent trip is relatively low, as a main reason very low.



* Less than 0.5%

Source: European Segmentation Survey Q. 9a, b, 19

Q. 9a) Was Aboriginal culture a reason for travelling?

9b) Was Aboriginal culture the main reason for travelling?

19. Did you participate in Aboriginal culture on your trip?

The qualitative work indicated that, for long haul travel, Aboriginal cultural attractions are generally not the main reason for going to a destination. There do seem to be exceptions to this, but these are people who want to spend extended periods of time staying with and interacting directly with natives.

Typically, travellers interested in Aboriginal cultural attractions do not pre-plan the visit, but say “I’ll check it out when I get there”.

So it becomes a component of a trip, not necessarily (or likely) a key driver.

2.3 Where Aboriginal Tourism Is Current Trip Activity

With Australia, Asia, South Africa and the Caribbean specifically, Aboriginal tourism was a significant activity on the most recent trip.

With trips to Canada, it has been a minor activity up to now for the British (19% on the most recent trip) and the Germans (26%), but more common among the French (41%).

The numbers on this chart and the previous one reflect the qualitative learning that Aboriginal cultural products and activities are sought out at the destination instead of being a serious part of the consideration set when planning.

Percent Among Past 3 Years Travellers

	U.K. (2232) %	Germany (1916) %	France (1749) %
An Aboriginal Tourism Activity On Recent Long Haul Trip To:			
Australia	56	59	n/a*
Asia	28	43	52
South Africa	27	50	46
Canada	19	26	41
Caribbean	16	44	36
USA	10	23	40

Source: European Segmentation Survey Q. 19

* Sample size too small to analyse.

Q. 19 Did you participate in Aboriginal culture experiences while in your trip?

2.4 Where Aboriginal Tourism a Current Purpose Of Trip

As a specific purpose of travel, seeking Aboriginal experiences was one of the trip motivators for as many as 24% of the French visiting Canada recently, but only 13% among German visitors and 6% among UK travellers to Canada.

As noted in previous sections, Aboriginal experiences are more likely to be an activity on a Canadian trip, not necessarily a significant motivator in the decision to visit the country.

According to qualitative learning from this and other projects, every long haul destination has its own set of “must sees” which are the main focus in planning a trip. The must sees for Canada (such as Niagara Falls, the Rockies, etc.) are top of mind during planning, instead of Aboriginal products. This is primarily because what is available in terms of natural must sees is clear to consumers, and thus the benefit is clear.

The Aboriginal cultural product offering of Canada at this time is not well known to consumers, thus they do not know what benefits it provides. Without knowing the benefits, it cannot become top of mind and thus cannot drive trips.

Percent Among Past 3 Years Travellers

	U.K. (2232) %	Germany (1916) %	France (1749) %
Aboriginal Tourism A Purpose Of Travel On Recent Long Haul Trip To:			
Australia	23	40	n/a*
Asia	6	18	30
South Africa	6	18	20
Canada	6	13	24
Caribbean	3	13	14
USA	2	13	13

Source: European Segmentation Survey Q. 9a

* Sample size too small to analyse.

Section 3: Product Interest in Canada

3.1 Latent Demand for Aboriginal Tourism in Canada

Among prospective future Canadian visitors, there is a very high level of interest in the opportunity to participate in Aboriginal cultural experiences, celebrations and attractions while in Canada – 82% among the French, 72% among Germans and still a solid 46% among UK travellers.

This is extremely encouraging for the sector and confirms that it has the potential to become a significant value added cultural product for Canada.

Qualitatively, interest is very high despite the fact that these travellers are not very sure of what the product is or what they would be doing. They just had a sense that it has the potential to be “good”.

However, due to this lack of familiarity (and thus lack of clear benefit), this enthusiasm turned into cautious optimism and then hope that Canada’s Aboriginal cultural products would not disappoint them as the Aboriginal products of other countries have.

“I would love to see Indians in Canada, but if it is like the commercial places with them coming out and doing a dance and then, ‘Here, buy our souvenirs’ I don’t want it.”

Percent Among Total Long Haul Travellers

	U.K. (2697) %	Germany (2548) %	France (2544) %
Interested in visiting Canada in next 2 years			
Very/Somewhat interested	73	65	85
	↓	↓	↓
	100%	100%	100%
Very/Somewhat interested in Canada			
Interested in participating in Aboriginal culture experiences, celebrations and attractions	46	72	82

Source: European Segmentation Survey Q. 22, 25

Q. 22 How interested are you, in visiting Canada in the next two years?

Q. 25 If you were to travel to Canada, would participating in Aboriginal culture experiences be your ideal trip?

It is at initial contemplation that the consumer's mindset and need state need to be clearly understood and addressed. Due to the high level of vagueness of the product and, particularly, its benefits, travellers have a much better idea of what they don't want from Canadian Aboriginal travel than what they do want. These ideas come primarily from past bad experiences in other countries.

Do Want

- "Integrate with them"
- "Learn from them"
- "See/experience how they live"
- "Understand their way of life"
- "Mutual exchange"
- "Don't know"
- "I hardly know what there is"



Don't Want

- Be in a big bus tour and taken to them.
- Everything staged and planned
- Fake displays and towns—museum villages just set-up for tourists.
- The markets and mass produced souvenirs.



These general perceptions and sentiments are consistent across all three countries.

3.2 Interested in Aboriginal Tourism on Next Trip to Canada

Among the target market, defined here as both interested in travel to Canada in the next 2 years and and at least somewhat interested in Aboriginal tourism experiences in Canada, this table illustrates the degree to what they are excited about the prospect.

As noted, 3 in 10 are extremely keen, at least 7 in 10 very interested, with fewer than 3 in 10 only mildly interested.

This is confirmation of the strength of interest among the target.

The qualitative work uncovered that, even with such a vague understanding of the product, the appetite for Canadian Aboriginal travel is significant and that travellers interested in Canada would likely investigate information on Aboriginal attractions if it were made readily available.

"If I thought about it of course I would check it out."

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism In Next 5 Years**

	U.K. (488) %	Germany (494) %	France (505) %
Interested in seeing Aboriginal culture on next trip to Canada			
Extremely interested	28	31	31
Very interested	44	61	45
Fairly interested	27	8	22

Source: Follow-up Online Survey Q. 6

Q. 6 On your next trip to Canada, how would you rate your interest in seeing Aboriginal cultural attractions, celebrations and experiences first hand?

3.3 Reasons for Next Trip to Canada

While virtually all in the target market would be interested in visiting Aboriginal attractions (by definition), at least 5 out of 10 claim that it would be one of the motivators for choosing Canada. Nature, however, remains the dominant driver.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism In Next 5 Years**

	UK (488) %	Germany (494) %	France (505) %
All Reasons for traveling to Canada on Next Trip			
To enjoy the natural scenery- lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	90	88	95
To visit protected areas, including nature reserves, regional or national parks	74	70	78
To see new places	70	58	63
To experience local culture	68	53	58
To see Aboriginal cultural attraction, celebrations, experiences	63	50	64
To see and watch wildlife	59	73	71
To visit historic sites, museums or galleries	59	48	49
To interact with the local people	56	49	71
To relax, unwind and decompress	48	38	43
To go shopping	31	12	34
To experience big cities in another country	31	35	38
Low rates, good deals, and discounts	29	13	29
To realize a long term dream	27	36	34
To attend festivals and/or events	26	21	38
To participate in outdoor activities	23	35	37
For entertainment and nightlife	21	8	19
To visit friends and relatives	21	12	14
To be together as a family	19	12	16
To go downhill skiing or snowboarding	13	10	10
To visit a spa, health centre or hotspots	12	12	12
Honeymoon	5	5	9
A trip that combined business with pleasure	2	2	3
Other reasons	2	2	1

Source: Follow-up Online Survey Q. 5a On that next trip to Canada, what would be all your reasons for traveling?

3.4 Potential Influence on Next Trip

As **part of a trip** to Canada, Aboriginal travel is an “activity” and ‘discovery” that can significantly enhance Canada’s overall product offering.

Clearly, it is not the main reason to go to Canada, nor is it for many other countries, but positioned well Aboriginal tourism has the potential to give Canada more depth and appeal.

When asked the question in the groups: “Could it increase interest in Canada?”

“Absolutely! It’s interesting and a part of nature.”

“It adds variation.”

“It makes it more adventurous.”

“It is a big motivator.”

3.5 Main Reason for Next Trip to Canada

Clearly, Aboriginal tourism would not be the primary reason to visit Canada (less than 5%). Rather it is a significant component to a broader nature based experience, as noted in the previous section.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism In Next 5 Years**

	UK (488) %	Germany (494) %	France (505) %
Main reason for trip to Canada			
To enjoy the natural scenery- lakes, rivers, waterfalls, glaciers, trees, beaches and mountains	47	53	52
To visit protected areas, including nature reserves, regional or national parks	3	5	6
To see new places	11	6	7
To experience local culture	5	5	6
To see Aboriginal cultural attraction, celebrations, experiences	4	3	2
To see and watch wildlife	4	4	1
To visit historic sites, museums or galleries	1	3	1
To interact with the local people	1	2	3
To relax, unwind and decompress	3	3	2
To go shopping	*	--	--
To experience big cities in another country	1	1	1
Low rates, good deals, and discounts	1	1	*
To realize a long term dream	5	9	11
To attend festivals and/or events	--	--	1
To participate in outdoor activities	1	1	*
For entertainment and nightlife	1	*	*
To visit friends and relatives	6	4	3
To be together as a family	3	1	3
To go downhill skiing or snowboarding	2	1	--
To visit a spa, health centre or hot springs	--	--	*
Honeymoon	3	1	1
A trip that combined business with pleasure	*	1	1
Other reasons	1	1	--

Source: Follow-up Online Survey Q. 5b

Q. 5b Which of those would be your main reason for travel on that trip?

Section 4: Specific Product Appeal in Canada

4.1 Aboriginal Tourism Experiences of Interest in Canada

The focus groups revealed that the target audience strongly desires authenticity in how they interact with/experience Aboriginal products. Furthermore, how Aboriginals approach/perceive nature is of highest appeal. This is evident here by what they identify as highly appealing. The Germans and French have the broadest interest across the attractions.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism On Next Trip**

	UK (483) %	Germany (492) %	France (497) %
How extremely/very interested each would be:			
Visit pristine wilderness areas with Aboriginal guides	69	91	91
To see the way they used to live	68	92	84
Tour certified authentic Aboriginal facilities (e.g., teepees, longhouses, kekuli)	64	86	86
Learn about traditional use of the land by Aboriginal people	63	76	77
Meet and interact with friendly local Aboriginal people in their communities	63	85	74
Hear Aboriginal legends	62	85	79
To walk on ancient Aboriginal trails	59	78	82
To see and meet modern Aboriginals	58	80	57
To see the way they live today	58	85	77
To observe craft making	57	84	78
Try traditional and modern cuisine prepared by Aboriginal people	57	85	84
To view artifacts (masks, bowls, totems)	57	79	70
Take part in outdoors adventures/tours with Aboriginal guides	55	79	82
To understand their spiritual belief	55	71	66

Source: Follow-up Online Survey Q. 8

Q. 8 In terms of Aboriginal cultural attractions, celebrations and experiences in Canada, how desirable would experiencing each of the following be to you on a trip to Canada?

Of less interest to visitors are activities that hint of being staged or “set up for the tourists” as the focus groups indicated. These include in particular ceremonial dances and singers/chanting with them.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism On Next Trip**

	UK (483) %	Germany (492) %	France (497) %
How extremely/very interested each would be			
Tour Aboriginal museums and art galleries	55	80	64
Take photographs of Aboriginal people and cultural sites	55	82	76
To watch ceremonial dances	54	81	73
Hear Aboriginal songs	52	78	74
To purchase their arts and crafts	51	66	67
View and/or purchase authentic Aboriginal crafts and handiwork	50	81	71
Hear Aboriginal languages being spoken	50	78	67
To stay in an authentic Aboriginal longhouse, teepee, wigwam, igloo or pithouse	44	74	70
To visit Aboriginal places I learned about in childhood	40	48	73
To participate in craft making	40	59	55
To sing/chant their songs with them	32	43	41
To participate in ceremonial dances	26	50	43

Source: Follow-up Online Survey Q. 8

Q. 8 In terms of Aboriginal cultural attractions, celebrations and experiences in Canada, how desirable would experiencing each of the following be to you on a trip to Canada?

The qualitative work revealed a general trend in thinking about Aboriginal travel that is important when considering how to communicate Canada’s Aboriginal products. The benefits of Aboriginal travel centre on experiencing a traditional way of life. The specific benefits include deeper connection to nature, purer lifestyle, more “spiritual” existence, and gaining an immersive understanding of a very different way of life.

Because of these benefits, those interested in Aboriginal travel want to be able to have extended, direct contact with natives who are living their native lifestyle.

What they absolutely do not want is something that is entirely staged, merely a museum or other attraction that could be set up anywhere, in any country, with anybody staffing it. This creates a “Disneyland” impression that many mentioned and rejected vehemently.

There is a very interesting conflict that occurs with potential travellers when considering the types of experience that are of interest to them in Canadian Aboriginal travel.

Because of people's very limited exposure to modern Aboriginals, they often use unrealistic perceptions to create an appetite for this kind of travel. Many of the participants, across all three countries, initially turned to childhood fantasies and dated movies of Indians on horseback, living in tepees, and wearing traditional costumes as a reference point for what they wanted to see as authentic.

It did not take long for them to realize that this most likely no longer exists (except with the Inuits) and heightened their fears that the Canadian product would be inauthentic.

As a highly attractive default, they came up with product ideas that would have them learn about, through experience, Canadian nature from a native perspective. This included interpretations, insights, medicine, food, spirituality, and many other aspects.

"You would feel that you would share their lives."

"You have the nature and the interpretation."

"They are the first inhabitants."

"My primary motive is to see nature; this would help me see all aspects of nature."

Clearly then, as much as traditional Canadian Aboriginal life has appeal its potential lack of authenticity can negatively affect interest. Therefore, it must be positioned appropriately and have expectations clearly managed, with benefits set, in order to be both authentic and appealing. Furthermore, building on the travellers' beliefs that Canada's most sought after feature—nature—can be greatly enhanced through Aboriginal tourism products is highly motivating and compelling for the consumer.

4.2 Aboriginal Tourism Concept Appeal

The most appealing of the 7 attraction concepts evaluated is Aurora Village. In France and Germany, Moccasin Trail also stands out.

Least appealing is Hotel-Museum Wendake.

Note that the Germans respond more positively to all 7 concepts than do the British or French travelers—revealing their enthusiasm.

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK (507) %	Germany (509) %	France (521) %
Extremely/Very Appealing			
Aurora Village	76	86	82
Moccasin Trail Tours	53	78	65
Haida Heritage Centre at Kaay Lingagaay	47	65	50
Blackfoot Crossing Historical Park	45	68	53
Wanuskewin Heritage Park	42	69	48
Metepenagiag Heritage Park	33	64	45
Hotel-Museum Wendake	33	54	38

Source: Follow-up Online Survey Q. 10a, 11a, 12a, 13a, 14a, 15a, 16a

Q. 10a, 11a, 12a, 13a, 14a, 15a, 16a How appealing are these Aboriginal attractions to you?

4.3 Reasons for Concept Appeal

In the early part of the groups, the travellers were asked to categorize the types of vacations they enjoy taking. Among the categories like beach, city tour, sight seeing, and hard adventure emerged one of the most popular groupings—discovery and adventure. How this relates to the concepts is that the most popular Aboriginal concepts also fall into this grouping, while the less popular ones do not.

This category definition also helps to understand the more attractive **benefits** of Aboriginal travel—discovery and adventure.

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK	Germany	France
Most Appealing elements for:			
Aurora Village	(390)	(439)	(435)
	%	%	%
Northern lights/Aurora Borealis	48	39	38
Dogsled ride	27	35	35
Experience or learn about culture/life/people/heritage	10	2	8
Nature/landscape/scenery/wildlife	8	4	18
Ice fishing	7	9	8
Most Appealing elements for:			
Moccasin Trail Tours	(274)	(404)	(337)
	%	%	%
Nature/landscape/scenery/wildlife	29	12	20
Polar bear tour/park/expedition	17	12	9
Experience or learn about culture/life/people/heritage	16	7	21
Hudson Bay/James Coastal Tour	9	14	7
Learning about the animals/Tracking animals	5	-	1
Sleeping in Teepee	3	3	9
Paddle with the guides/canoeing	4	6	9
Canoes/Boats	4	21	6

Source: Follow-up Online Survey Q. 11b, 12b

Q.11b, 12b (IF EXTREMELY OR VERY APPEALING IN a) Which elements of that attraction do you find the most appealing?

Additional elements that determined if an Aboriginal concept was appealing or not were:

1. Uniqueness
2. Amount of time out in nature
3. Amount of time and type of involvement with natives
4. Authenticity
5. Amount of freedom vs. comfort
6. Amount of structure
7. Level of activity

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK	Germany	France
Most Appealing elements for:			
Haida Heritage Centre at Kaay Llnagaay	(249)	(320)	(154)
	%	%	%
Experience or learn about culture/life/people/heritage	25	14	29
Arts and crafts	9	5	13
Food/Cuisine	8	9	13
Totem Poles	8	7	10
History	7	1	1
Paddle with the guides/canoeing	6	12	7
Most Appealing elements for:			
Blackfoot Crossing Historical Park	(239)	(344)	(268)
	%	%	%
Experience or learn about culture/life/people/heritage	19	10	28
Sleeping in Teepee	16	15	32
Chokecherry trail eco tour	9	8	1
Chief Crowfoot outdoor tour/barefoot crossing	8	4	*
History	7	3	4
Walks/hikes/trails	4	1	11
Nature/landscape/scenery/wildlife	6	4	6
Overnight stay/First Nation accommodation	4	12	1

* Less than 0.5%

Source: Follow-up Online Survey Q. 10b, 13b

Q. 10b, 13b (IF EXTREMELY OR VERY APPEALING IN a) Which elements of that attraction do you find the most appealing?

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK	Germany	France
Most Appealing elements for:			
Wanuskewin Heritage Park	(214) %	(344) %	(254) %
Experience or learn about culture/life/people/heritage	24	11	23
Food/Cuisine	13	7	13
Traditional Medicine	10	10	3
Walks/Hikes/Trails	9	12	20
Dance	6	5	12
Sleeping in a teepee	5	7	16
Overnight stay/First Nation accommodation	3	12	3
Most Appealing elements for:			
Metepenaging Heritage Park	(178) %	(327) %	(239) %
Experience or learn about culture/life/people/heritage	28	10	22
Food/Cuisine	13	18	17
Archaeological finds/Artifacts	13	8	16
History	9	2	5
Paddle with the guides/canoeing	8	3	5
Walks/hikes/trails	2	13	19
Arts and crafts	4	2	8
Most Appealing elements for:			
Hotel-Museum Wendake	(169) %	(269) %	(197) %
Experience or learn about culture/life/people/heritage	21	17	20
Good accommodation/Hotel	18	5	9
Food/Cuisine	12	14	21
Museums	11	12	11
Luxurious/Luxury/Feels good/Comfortable	6	4	4
Nature/landscape/scenery/wildlife	5	1	10

Source: Follow-up Online Survey Q. 14b, 15b, 16b

Q. 14b, 15b, 16b (IF EXTREMELY OR VERY APPEALING IN a) Which elements of that attraction do you find the most appealing?

Overall

The two strongest concepts are Aurora Village and Moccasin Trail Tours. The main reason for this is that they are heavily weighted towards existing outdoor activities in a natural and authentic environment.

Blackfoot Crossing Historical Park is just at the threshold of the amount of outdoor activities, nature, and authenticity desired by travellers. However, the remaining concepts have gone too far into being educational, enclosed, and inactive for visitors. They seem more like class trips than Aboriginal travel.

Aurora Village

Aurora Village ranked highest in terms of appeal. This product delivered completely on discovery and adventure. It is **unique**, feels **authentic**, includes a lot of time **outdoors** is **unstructured** and produces a lot of **activities**, and the kind of exposure to natives that is desirable and **authentic**.

Moccasin Trail Tours

This concept was popular for the same reasons as Aurora Village. Moccasin Trail Tours delivers on the desired benefits: uniqueness, outdoors, active, high and direct involvement with natives.

Why it didn't rate as highly as Aurora Village is that it is a little weaker on authenticity.

There is a subtle difference between suggesting that this is how the Natives live and this is a camp that is set-up and run by Natives. When the participants thought the former was the case they felt disbelief and it came across as being a little fake. When the later message came through, participants relaxed as they believed that Natives would run a different type of camp than non-Natives. This made the concept unique. It is this aspect of the concept that needs to be reinforced.

Furthermore, it would help this concept if there were mentions of catering to small groups in order to reduce the fear that it caters to bus loads of tourists. Also, the use of the word "pre-packaged" is a negative.

Haida Heritage Centre at Kaay Lenagaay

Although this concept came through in uniqueness and the promise of discoveries, it is weak on adventure, outdoor activities, and authenticity.

An improvement would be to avoid using the word centre, it ladders up to “tourist trap”; use outpost, camp, or nature reserve.

As it reads, there is far too much emphasis on the “learning and lecturing” and far too little on experiencing. These travellers want to be educated through feeling like anthropologists doing field work, as opposed to students in an anthropology lecture.

Much more emphasis needs to be placed on the authenticity of the accommodations and people working there, as well as on the outdoor activities. The learning centre must take a back seat and be positioned as an additional activity that can be done in one’s downtime. There must also be reassurance that there will be a significant amount of informal interaction with the Natives.

Blackfoot Crossing Historical Park

This concept is right at the threshold that travellers will tolerate for visiting a centre. There is far too much focus on education, whether in the form of lectures or dance performances, and far too little on activities and adventure.

This concept did as well as it did because of the outdoor ecotours. In there own words “less on Disneyland” and more on authenticity.

The cultural education/entertainment centre needs to be positioned as a place to visit when not engaged in outdoor activities that allow travellers to relate to nature as Natives do.

Wanuskewin Heritage Park

The European travellers are hungry for “the real thing”, therefore they have difficulty with centres that mimic the Native way of life. The problem is that the real thing doesn’t exist anymore, and therefore these products are a new positioning.

Here again, the travellers need to feel a sense of adventure when they come to the park. Currently, they are not getting this from Wanuskewin. To many, it felt too scheduled, educational, and inauthentic.

A major improvement would be to include various adventure activities that surround the cultural centre.

Metepenagiag Heritage Park

Far too much focus on education and performance, and too little on adventure activities and communicating with the natives.

Hotel-Museum Wendake

This concept was the least attractive as there was very little in the way of discovery and adventure. If outdoor activities and interaction with Natives were attached to this site there would be far greater interest.

Age Skews

Overall, the results show a skew towards passive observation and understanding among older travellers. They want authentic, direct experience, but do not want to give up too much comfort or security. This makes Moccasin Trail Tours generally popular among the older individuals, as the idea of a Native guide giving set tours is reassuring without giving up too much authenticity.

Likewise, Blackfoot Crossing Historical Park does better with older targets as they are more tolerant of trading direct contact with nature and adventure for comfort.

Communicating that a location offers a range of options is important, allowing multiple age segments to be drawn to a single site as well as assuring potential travellers that there is something to do everyday, whether they feel adventurous or more sedate.

	The UK			Germany			France		
	18-29 (88) %	30-49 (180) %	50+ (239) %	18-29 (118) %	30-49 (232) %	50+ (159) %	18-29 (117) %	30-49 (228) %	50+ (176) %
Haida Heritage Center	52	47	44	51	58	77	45	49	52
Moccasin Trail Tours	53	61	45	73	75	84	61	63	68
Aurora Village	81	80	69	85	87	84	90	81	80
Blackfoot Crossing Historical Park	40	45	47	62	62	77	47	50	59
Hotel-museum Wendake	38	32	32	43	49	64	32	37	41
Metepenagiag Heritage Park	28	37	32	51	68	67	36	45	49
Wanuskewin Heritage Park	36	43	43	60	66	75	45	48	49

Source: Follow-up Online Survey Q. 10a, 11a, 12a, 13a, 14a, 15a, 16a

Q. 10a, 11a, 12a, 13a, 14a, 15a, 16a How appealing are these Aboriginal attractions to you?

4.4 Ideal Duration at Concept

The number of days that travelers would like to spend at each attraction is far longer than one would expect – 3-5 days at each on average.

This is testimony to the desire to get involved with the Aboriginal culture in more than a superficial way.

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK (507) %	Germany (509) %	France (521) %
How many days would you like to visit:			
Aurora Village			
1-2 days	21	19	20
3-5 days	35	36	34
6+ days	15	19	26
Average	4.9	5.5	5.3
How many days would you like to visit:			
Moccasin Trail Tours			
1-2 days	20	19	30
3-5 days	26	29	26
6+ days	16	22	19
Average	4.9	5.6	4.7
How many days would you like to visit:			
Haida Heritage Centre at Kaay LIngagaay			
1-2 days	39	35	41
3-5 days	16	21	15
6+ days	9	14	13
Average	3.4	4.1	3.5
How many days would you like to visit:			
Blackfoot Crossing Historical Park			
1-2 days	41	34	41
3-5 days	17	20	17
6+ days	8	15	13
Average	3.6	4.5	3.6

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism**

	UK (507) %	Germany (509) %	France (521) %
How many days would you like to visit:			
Wanuskewin Heritage Park			
1-2 days	33	31	39
3-5 days	23	26	21
6+ days	8	14	11
Average	3.5	4.6	3.5
How many days would you like to visit:			
Metepenagiag Heritage Park			
1-2 days	38	34	40
3-5 days	17	21	21
6+ days	6	12	12
Average	3.0	4.0	3.5
How many days would you like to visit:			
Hotel-Museum Wendake			
1-2 days	30	32	38
3-5 days	18	20	18
6+ days	11	15	12
Average	3.8	4.0	3.3

Source: Follow-up Online Survey Q. 10c, 11c, 12c, 13c, 14c, 15c, 16c

Q. 10c, 11c, 12c, 13c, 14c, 15c, 16c How many days would you like to spend visiting this attraction?

4.5 Ideal Duration At All Aboriginal Attractions

There data suggests that, on average, visitors would be prepared to spend virtually half of their vacation days at Aboriginal attractions.

While this is likely unrealistic, again it talks to the desire of the European traveller to engage in the culture in Canada.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism**

	UK (507) %	Germany (509) %	France (521) %
Total duration of next trip to Canada			
1-10 days	10	4	18
11-15 days	45	20	47
16-25 days	33	51	26
25 + days	12	25	9
Average	18.1	22.7	17.4
Days visiting Aboriginal attractions			
1-4 days	25	8	15
5-7 days	36	20	32
8-10 days	17	29	32
11+ days	22	42	22
Average	8.1	12.2	9.0

Source: Follow-up Online Survey Q. 17

Q. 17 Overall, on that trip to Canada, how long would that trip likely be and how many days of your vacation would you want to spend at Aboriginal attractions, celebrations and experiences?

4.6 Aboriginal Tourism Experiences of Interest In Canada

Only a minority have any particular region in mind for Aboriginal experiences. Of those who do, it is British Columbia and Alberta for UK and German travellers, Quebec for French travellers.

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism On Next Trip			
	UK (483) %	Germany (492) %	France (497) %
Interested in Aboriginal Tourism in specific region			
Yes	26	34	38
No	74	66	62
Which regions would like to experience	(156) %	(184) %	(205) %
British Columbia	48	44	20
Alberta	47	40	30
Yukon	35	35	27
North West territories	32	27	21
Saskatchewan	29	22	19
Ontario	25	26	25
Quebec	18	36	67
Atlantic Canada	17	21	16
Nunavut	16	15	27
Manitoba	15	23	12

Source: Follow-up Online Survey Q. 9a, b

Q. 9a Are there any particular regions of Canada where you would like to experience Aboriginal culture?

Q. 9b Which regions in particular?

Section 5: Communication

5.1 How Typically Refer To Indigenous People Of Canada

Only a minority refer to Canada's indigenous people as "Aboriginals".

Aside from Inuit, a familiar people, the most widely used term is Indians (Indianer in Germany, Indiens or Amérindiens in France).

Natives is not consistent, nor is indigenous people or First Nations.

In the focus groups, Aboriginal and native (Ureinwohner and eingeborene respectively) were used more consistently in Germany. In the French focus groups Indians (les Indiens) was common, with indigenous/Aboriginals (autochtones) as a rarely used alternative.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism On Next Trip**

UK		Germany		France	
	(483) %		(492) %		(497) %
Natives	22	Eingeborene	9	Amérindiens	28
Indigenous People	21	Ursprüngliches Volk	14	Autochtones	4
Inuit	20	Inuit	21	Inuits	20
Indians	17	Indianer	26	Indiens	21
First Nations	10	First Nations	8	Premières Nations	7
Aboriginal People	6	Ureinwohner	29	Aborigènes	23
Canadians	2				

Source: Follow-up Online Survey Q. 7

Q. 7 How do you typically refer to the indigenous people of Canada?

5.2 Where First Learned About Canada's Aboriginal Culture

Germans tended to first learn about Canada's Aboriginal people from television and films. The French were also first informed by television, along with magazine stories.

The British first learned about the culture either in school or from television or film.

For the Germans, the internet also has been a significant source of early learning.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism**

	UK (507) %	Germany (509) %	France (521) %
Location			
In school	34	37	29
Television	27	62	38
The internet	24	49	22
Movies/Films	20	45	21
Other friends or relatives	20	30	19
Past visitors to Canada	19	14	27
Magazines	15	37	32
Newspapers	8	22	12
Other sources	3	4	3

Source: Follow-up Online Survey Q. 20

Q. 20 Where did you first learn about Canada's Aboriginal people?

5.3 Finding Information on Aboriginal Attractions

Most would use the internet if they wanted to learn more about Canada's Aboriginal people.

However, many would also expect guidance from the trade (tour operators or travel agents).

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism**

	UK (507) %	Germany (509) %	France (521) %
Sources			
Internet	94	95	96
Tour operators	36	48	46
Travel agents	32	53	44
Friends	29	28	32
Magazines	26	32	45
Other	7	8	5

Source: Follow-up Online Survey Q. 18a

Q. 18a Prior to traveling to Canada, where do you or would you specifically look for information on Canadian Aboriginal attractions if you wanted to know more about them?

5.4 Website Information on Aboriginal Attractions

With the internet, prospective visitors would seek out specific Aboriginal tourism websites, likely using word/phrase search engines. Government sites would also be popular sources for information.

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK (477) %	Germany (482) %	France (496) %
Those Using Internet Sites			
Websites of Canadian Aboriginal tourism organizations	65	52	57
Word/phrase search engine (e.g., google, yahoo, MSN)	61	77	62
Websites of national government tourist offices	53	45	63
Websites of Provincial. Regional or local government tourist offices	44	32	33
General travel sites (e.g., expedia/ Travelocity/lastminute.com)	42	42	25
Traveler review sites (e.g., tripadvisor.com)	41	33	40
Resort websites	37	47	18
Tour operators websites	33	45	39
Local travel agency	16	28	28
Other private sector website	4	7	5
Travel blogs	1	*	3

* Less than 0.5%

Source: Follow-up Online Survey Q. 18b

Q. 18b (IF INTERNET IN Q. 18a) You mentioned the internet as a source. Which sites in particular did you or would you visit for information on Aboriginal attractions, celebrations and experiences in Canada?

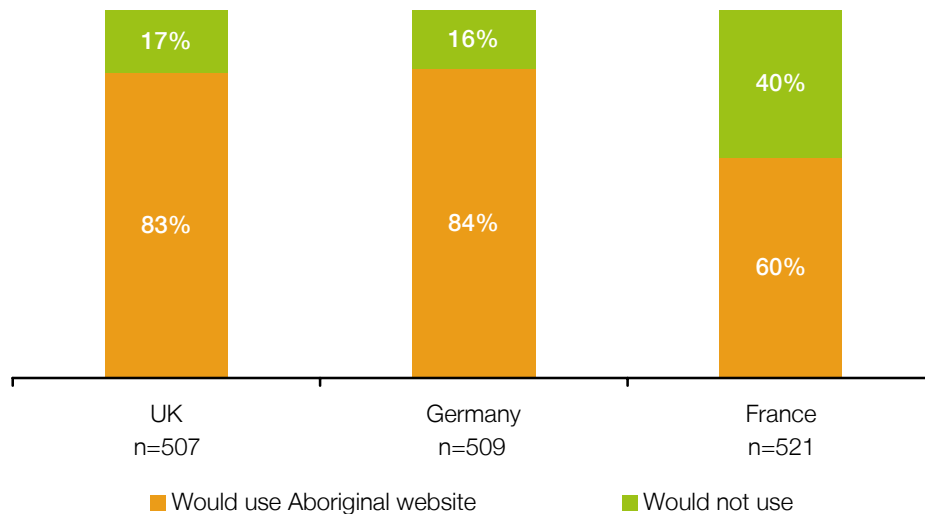
5.5 Use of Aboriginal Website

The majority would be interested in a specific website devoted to Canadian Aboriginal attractions.

This represents an excellent opportunity, then, to communicate details of Canada's Aboriginal attractions.

An important related learning from the focus groups is that many potential travellers do not feel as if they are wanted as visitors by Aboriginal groups in Canada. There is a sense that such tourism may be seen as a continuation of colonialism. They want to be assured in communications that they are welcomed guests and that the ones extending the invitation are the actual Aboriginals.

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism



Source: Follow-up Online Survey Q. 19

Q19. Would you use a special website devoted exclusively to Canadian Aboriginal attractions and experiences?

Section 6: Target Market Profile

6.1 Demographic Profile for Aboriginal Seekers

Aboriginal seekers tend to be quite typical of general travellers in terms of age, household composition, gender and socio-economic level.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism**

	UK (507) %	Germany (509) %	France (521) %
Age			
18 – 29	18	19	19
30 – 39	22	18	22
40 – 49	20	21	23
50 – 59	14	16	17
60+	25	26	19
Gender			
Male	44	49	54
Female	56	51	46

Source: European Segmentation Survey Q. 2, 3a, 28

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

	UK (507) %	Germany (509) %	France (521) %
Marital Status			
Married/living with someone	73	67	71
Single	17	21	18
Divorced/widowed/separated	9	12	11
Household Composition			
Adults only	66	73	65
With children<18	34	27	35
Occupation			
Total employed	60	61	57
Semi or unskilled manual worker	3	3	1
Skilled manual worker	5	8	4
Supervisory or clerical / junior managerial / professional / administrative	22	16	16
Intermediate managerial / professional / administrative	15	11	20
Higher managerial / professional / administrative	5	3	6
Self employed	5	14	6
Employed part-time	5	7	4
Student	8	10	7
Housewife/husband	8	4	4
Retired/semi-retired	22	22	24
Other	1	2	6

Source: European Segmentation Survey Q. 30, 31, 32

Percent Among Prospective Canadian Travellers Interested In Aboriginal Tourism

UK		Germany		France	
	(507) %		(509) %		(521) %
Education		Education		Education	
Less than secondary/secondary school	22	Less than secondary/vocational school	20	Less than secondary school	8
A levels/Scottish highers/GNVQ/BTEC	31	Vocational continuing education	26	Higher education	55
Undergraduate degree or equivalent	27	University	25	University	25
Post graduate degree or equivalent	19	Graduate School	27	Graduate School	12
Household Income (annual gross £)		Household Income (monthly net €)		Household Income (monthly gross €)	
Under £20,000	18	Under €1,800	22	Under €1,500	12
£20,000 - <£25,000	9	€1,800 - <€2,300	16	€1,500 - <€2,300	18
£25,000 - <£30,000	12	€2,300 - <€2,800	11	€2,300 - <€2,800	13
£30,000 - <£40,000	18	€2,800 - <€3,800	17	€2,800 - <€3,800	25
£40,000 - <£50,000	14	€3,800+	15	€3,800+	20
£50,000+	15				

Source: European Segmentation Survey Q. 33, 34

6.2 EQ Segmentation

Authentic Experiencers and Gentle Explorers dominate the target market in each country.

**Percent Among Prospective Canadian Travellers
Interested In Aboriginal Tourism**

	UK (507) %	Germany (509) %	France (521) %
Segments			
Authentic Experiencer	22	32	28
Rejuvenator	2	1	1
Personal History Explorer	2	2	3
No Hassle Traveller	5	7	7
Free Spirit	17	10	18
Cultural History Buff	2	6	4
Gentle Explorer	42	33	33
Virtual Traveller	1	2	-
Cultural Explorer	9	7	7

Travel Trade Interviews

Section 7: The UK Trade

7.1 Background on Tour Operators and Agencies Interviewed

For the UK market we interviewed 5 Canadian based inbound tour operators, 6 overseas in-market tour operators based in the UK, and 5 in-market travel agents, based in the UK.

In general the inbound receptive operators and the UK based tour operators were very knowledgeable and provided considerable helpful information, although only two of the five travel agents appeared to be knowledgeable about Aboriginal tourism in Canada.

Types of Products Sold

The inbound operators interviewed are involved in a full range of package tour products including the following:

- Group tours (including small groups)
- Fly-drive packages
- FIT travellers (fully independent travel)
- Incentive travel and corporate groups.

The UK based in-market tour operators we interviewed offer the following types of packages:

- Escorted group tours
- Fly-drive and self-drive packages
- Rail tours and cruises
- Specialized tours for seniors and singles
- Adventure tours.

The travel agents focus on arranging individual itineraries and booking travellers on tour operator packages (both group tours and FIT).

Regions of Canada Included on Itineraries

The inbound receptive operators we interviewed essentially cover the entire country. Two of the operators offer products all across Canada, while the others were more regionally focused such as in Atlantic Canada, Western Canada or Atlantic plus Ontario and Quebec.

The UK based in-market tour operators sell itineraries that cover much of Canada, although most do not include Saskatchewan and some have a strong regional emphasis such as a focus on Western Canada.

7.2 General Perspective on Aboriginal Tourism

Countries Most Popular for Aboriginal Cultural Tourism Experiences

The majority of inbound operators and UK-based tour operators feel that Australia is most popular for Aboriginal cultural tourism experiences, followed by New Zealand and South Africa. Australia's Aborigines seem to be well recognized and it was noted that Australia does substantial tourism promotion, so there seems to be a broad awareness of its Aboriginal tourism attributes and associated iconic destinations such as Ayers Rock. The comment was made that countries like Australia, New Zealand and South Africa are "dream destinations" of many travellers, which enhances their appeal. While Canada and the US were mentioned by one inbound operator and one in-market tour operator, there was a general feeling that there much less awareness of Canada's Aboriginal product, compared to Australia's. Other countries mentioned in relation to Aboriginal cultural tourism experiences included Peru, and some countries in Asia (Vietnam/Cambodia/Laos).

Terminology Used to Refer to Aboriginal Tourism

The tour operators and travel agents interviewed primarily responded with regard to North American Aborigines. The terms used are primarily "First Nations", "Natives", "Indians" and "Aboriginals". There are some variations on this such as "Native Americans", "Native Indians", "Native Canadians" and "Inuit" and "Eskimos" were also noted. In general it appears that the use of First Nations or Aboriginals (which are primarily used in Canada) is reasonably well understood.

Kinds of Aboriginal Experiences Travellers are Looking For

First and foremost receptive operators, in-market tour operators and travel agents all feel that visitors are looking for authentic cultural experiences when it comes to Aboriginal tourism. They are interested in learning about the culture and traditions of the Aboriginal peoples. They are particularly interested in the unique traditional experiences and examples noted included the "Talking Stick Ceremony", the story behind the "Dream Catcher", and various ceremonies including dancing and drumming. Other types of experiences and attractions of interest that were noted include:

- Living museums - the example of Head Smashed In Buffalo Jump was provided
- Visits to Reserves
- Living with the Indians

- Learning how the Eskimos survive in cold climates
- Younger visitors are interested in outdoor activities including canoeing, wildlife viewing and walks with Native guides.

This suggests that the Aboriginal heritage and cultural centres that have been developed across Canada are definitely of interest, but even more important is the opportunity to interact with Aboriginal people and experience their culture and traditions first hand.

Other Activities of Tourists Interested in Aboriginal Tourism

For the most part, according to almost all of the tour operators, inbound receptive operators and travel agents, their travellers are experiencing Aboriginal tourism as part of a broader itinerary. Many indicated that they do not see a strong market for “Aboriginal only” tours, with the possible exception of some specialist niche markets such as groups of students that may be studying Aboriginal culture.

UK travellers interested in Aboriginal tourism participate in a wide range of cultural and outdoor activities in their travels and a range of examples were given such as the following:

- Museums and National Parks
- Adventure activities including horseback riding, hiking, biking, canoeing, kayaking and river rafting
- Wildlife viewing such as bear and whale watching
- Experiencing the natural environment, scenery, and flora and fauna via nature walks.

This suggests substantial potential to integrate Aboriginal tourism products with other outdoor adventure and ecotourism activities.

7.3 Canada's Aboriginal Tourism Experiences

Knowledge of What Canada Offers in Aboriginal Tourism

Both the inbound receptive operators and the in-market UK tour operators had knowledge of Canada's Aboriginal tourism experiences, depending on what itineraries they have been involved in. Awareness of specific Aboriginal tourism attractions that were mentioned (unprompted by the interviewer), include the following:

- Head Smashed In Buffalo Jump - seems to be well known, perhaps because of its status as a UNESCO World Heritage Site.
- Quw'utsun' Cultural & Conference Centre in Duncan, BC
- 'Ksan Historical Village in Hazelton, BC
- Great Spirit Circle Trail on Manitoulin Island in Ontario
- Wanuskewin Heritage Park in Saskatoon
- Bella Coola, on the BC coast.

There seemed to be a greater knowledge of Aboriginal attractions in Western Canada, probably in part because there is more market-ready product available that is of interest to tour operators. There is also an awareness that there are a lot of Aboriginal cultural museums and interpretive attractions, although some of those interviewed did not have specific knowledge of individual attractions. There was a general feeling, however, that Canada does have a lot of Aboriginal tourism experiences available.

How Canada's Aboriginal Tourism Experiences Measure Up to Those of Other Countries

Some of those interviewed really had no opinion as to whether or not Canada's Aboriginal tourism products measure up to those of other countries, in part because they are not sufficiently knowledgeable about the specifics of Canada's Aboriginal tourism products, nor those of other countries. However, for those that did offer an opinion, it was mixed as to whether Canada's Aboriginal tourism experiences measure up to those offered in other countries.

- Some operators felt that in fact, Canada's Aboriginal tourism experiences were in a way better than those of other countries, as they felt that the Aboriginal experiences had been overly commercialized in countries like New Zealand and Australia.

- It was suggested that it is important that standards be established for Aboriginal tourism products in order to ensure they do measure up to those offered in other countries and that Canada's Aboriginal attractions be promoted in connection with nearby iconic attractions.
- They noted, for example, that the Aborigines are promoted in conjunction with Ayers Rock which has international recognition and that the Maoris in New Zealand are associated with Rotorua, which is noted as a pre-eminent location for mineral hot springs and thermal activity.
- In British Columbia it is possible to promote Aboriginal tourism products in connection with mountain and coastal vacations and nearby national or provincial parks such as Gwaii Haanas National Park Reserve, Garibaldi Provincial Park and major attractions such as Whistler and the Okanagan Valley.

Some of those interviewed indicated that they do not associate Aboriginal tourism with Canada.

Image of Canada's Aboriginals Overseas

Among the travel trade the overall image of Canada's Aboriginals is generally positive, as it relates to Aboriginal tourism products and doing business with them. It was noted that there are many First Nations in Canada, which are not homogeneous, so it is essential, as a tour planner to do adequate advance research and planning in order to understand the differences and choose the right products and attractions.

- Positive aspects that were noted included the opportunity it provides to explore Canada's past as well as present, the dimension of authenticity and history that is added, the general friendly environment provided and the opportunity for travellers to see how the Aboriginals currently live and have lived in the past.
- It was also mentioned by some inbound tour operators that the Aboriginals are easy to work with and there are lots of requests for Aboriginal tours and products to be included in itineraries.

On the negative side, some of the inbound operators noted that the business relationship can be difficult and they are aware of some of the very significant social problems associated with Aboriginal communities that present a negative image.

Most of the UK travel trade interviewed feel that their clientele do not have any specific pre-conceived images of Aboriginals in Canada. In general it is felt that there is limited awareness of the Aboriginal culture and really just a general interest in learning about the way they live now and in the past. Any pre-conceived images that UK travellers have of Aboriginals are along the lines of Indians and Eskimos that have been portrayed in Hollywood movies and the media in the past. Apparently some clients are enchanted with the north and like the idea of coming to stay in an Igloo. Some, however, have associated Aboriginals with the seal hunt, which has had much negative publicity in Europe.

7.4 Marketing and Packaging Canada's Aboriginal Tourism Products

How Aboriginal Cultural Tourism Experiences Should be Portrayed to Appeal to UK Market

Overall the travel trade indicated that there is a need for more marketing of Aboriginal tourism products to UK tour operators and that direct contact with tour operators would be most helpful, accompanied by appropriate presentations, information and promotional materials on Aboriginal tourism products. There is also a strong need for much more destination marketing of Canada to consumers and within that making them aware of Canada's interesting Aboriginal tourism products, which helps to set Canada apart as a unique destination. Specific ideas on how Canada's Aboriginals and Aboriginal cultural tourism experiences should be portrayed include the following:

- Emphasizing how the Aboriginal communities are very close to nature, use plants for medicinal purposes and can offer a unique and outstanding experience.
- Stressing the uniqueness of Canada's Aboriginal communities and how they are different from those in the U.S., New Zealand and Australia.
- Emphasizing the authentic experiences available combining museums, cultural centres and actual interaction with Native guides.
- Stressing Aboriginal tourism products as unique educational experiences and an excellent add-on to tour itineraries to learn about the Aboriginal culture
- Unique opportunities to learn about their traditional way of life, local handicrafts, and cuisine.

It was noted that there should be more Aboriginal tourism products and experiences portrayed in brochures and promotional material on travel to Canada.

Inclusion of Aboriginal Tourism Products in Current Packages

Several of the inbound receptive operators and UK-based tour operators do offer Canadian Aboriginal products in their itineraries. Once again the examples given were primarily Western Canada Aboriginal tourism products including the following:

- Southern Alberta Aboriginal tourism products including Head-Smashed-In-Buffalo-Jump, visits to Aboriginal exhibits at the Glenbow Museum
- Takaya Tours in the Vancouver area
- 'Ksan in Hazelton, BC
- Visits to Aboriginal communities in the Tofino, Ucluelet, Duncan and Bella Coola areas
- Museum of Anthropology at UBC
- Some mentioned visits to ranches and Indian reservations (primarily Southern Alberta) for Aboriginal tourism experiences.
- Visits to Inuit Aboriginal communities in the north.

A number of reasons were provided for not including Aboriginal tourism products more often, such as the following:

- Lack of awareness and lack of consumer demand for Aboriginal tourism products was considered the key reason, so there is a need to include more Aboriginal tourism products and experiences in the CTC's overall marketing.
- There are concerns with quality and customer satisfaction in the case of some operators who have incorporated Aboriginal tourism products and experiences - some of them are clearly not market-ready.
- There is a lack of knowledge by tour operators and consumers of what specific Aboriginal products and services are available and there is a need for a broader-based offering of unique Aboriginal products and services. It was noted, for example, that Newfoundland's Conne River Aboriginal tourism product is a long way from being market-ready and is relatively inaccessible from the main touring routes in that province.

Aboriginal Tourism as a Growth Market for Canada

There is a general consensus among the UK travel trade that Aboriginal tourism products and experiences are a growth market and this is endorsed by all of the inbound receptive operators, who have the most knowledge of what is potentially available and its uniqueness. The view is mixed among the UK-based in-market tour operators as some feel that there is good growth potential, whereas others felt that it did not represent a broad-based growth market, although perhaps a small niche market. The lack of iconic Aboriginal attractions and images is given as a reason for the no-growth view. Some of the travel agents feel that it is a growth market because of the uniqueness of Canada's Aboriginal tourism products and experiences.

The fundamental conclusion is that there is probably growth potential, but substantial marketing and education of both consumers and tour operators in the U.K. will be required to tap into this potential.

Barriers to Growth

A key barrier identified is clearly the lack of awareness in the U.K. of Canada's Aboriginal tourism products and experiences. The comment was made that there is a need to overcome the "mass market" impression that all of Canada's Aboriginal tourism products and experiences are essentially the same, with not much variation, which of course is not the case. There is also a feeling that much of the Aboriginal tourism product is not market-ready and there is a lack of information and promotional material on what market-ready products and experiences are currently available. Also, there needs to be a stronger appeal of the Aboriginal tourism product by typing them in more closely with iconic destinations such as the Rockies or other well-known attractions.

How Canada's Aboriginal Stakeholders Can Help Achieve Growth

Inbound receptive operators, in-market tour operators and travel agents all agreed that there is a need to more proactively market Canada's Aboriginal tourism products and services to all levels of the travel trade. There needs to be a more significant investment in marketing, working closely with in-market tour operators, receptive operators and the Canada specialist travel agency networks to educate them about Canada's Aboriginal products and experiences. Among some of the specific ideas mentioned are:

- Having centralized Aboriginal tourism marketing websites that promote a range of market-ready Aboriginal tourism products and experiences - the example of Aboriginal Tourism BC was given as a website that achieves this, but this is needed for Canada and the Aboriginal Tourism Canada website is more focused on the industry than on consumer and travel trade marketing.
- Creating more awareness of Aboriginal tourism products and experiences through brochures, such as the one published by Aboriginal Tourism BC, as well as via websites containing lots of information on unique Aboriginal products and experiences.
- Having a presence of Aboriginal tourism operators, products and experiences at travel trade shows.
- Forming partnerships with non-Aboriginal operators is another strategy that should be considered, as well as having one or more iconic Aboriginal tourism products and experiences that serve as flagships for promoting this type of tourism in Canada.

How Canada's Aboriginal Attractions Should be Positioned and Portrayed

Helpful ideas provided by U.K. receptive operators, in-market tour operators and travel agents included the following:

- It is important that the Aboriginal products be positioned as being authentic and providing unique cultural experiences, helping to keep history alive
- Current day Aboriginal life should also be portrayed including hunting and fishing and how they maintain their more traditional lifestyle in some cases
- The rich diversity of Aboriginal tourism products and experiences in Canada should be clearly portrayed, as it is quite different in different provinces and even different parts of individual provinces - West Coast Aboriginals for example have a very different culture, traditions and built heritage than First Nations in the prairies, or those in Atlantic Canada.
- Aboriginal products and experiences should be portrayed more prominently in the CTC's overall tourism marketing of Canada and its different regions.
- Interesting experiences and activities that can take place in connection with visits to Aboriginal communities and attractions should be promoted.

- Even in television advertising and ads in major travel publications, it is important to portray some Aboriginal tourism products and experiences to create greater visibility in the marketplace.
- Organization of media familiarization tours to encourage more articles in newspapers, magazines and other consumer media is important.
- Appealing to the older demographic segments should be a key target of Aboriginal tourism marketing efforts.

Most Effective Media to Target Prospects

A range of examples were provided by the U.K. travel trade:

- Premier print publications such as the *Sunday Times* and *Telegraph*, various mass market magazines, travel magazines and travel trade news publications
- Write-ups and advertisements in travel trade publications
- Inclusion of Aboriginal tourism products, experiences and images in TV advertising promoting Canada
- Travel trade shows, displays and promotional events, such as special evenings or dinners promoting Canada's Tourism products and Aboriginal tourism
- Stronger representation on the Internet, including the CTC's, provincial tourism and Aboriginal tourism association websites.

How the CTC and Other Agencies in Canada Can Help

Significantly more advertising and promotional support relative to Aboriginal tourism products and experiences is essential, if the CTC wants to help achieve growth in this tourism market segment. This involves spending more money, providing more and better information, seeding articles in magazines and news publications, providing correct information about Aboriginal tourism products and experiences, providing product write-ups, and ensuring that provincial tourism websites have lots of information on Aboriginal tourism products and experiences readily available. At major trade shows and marketplaces such as Rendez-vous Canada, having specific seminars and talks about Aboriginal tourism and experiences would be a good strategy.

Type of Help CTC Could Provide

Assisting inbound tour operators and UK-based in-market tour operators with awareness building and marketing would be most helpful. The receptive operators and UK-based tour operators also feel there is a need to assist Aboriginal communities and organizations with their product development and to help tour operators and inbound receptive operators design well-conceived packages that include market-ready Aboriginal tourism products and experiences. It is important that the CTC and Aboriginal tourism organizations combine forces in order to effectively market and promote Canada's Aboriginal tourism industry.

7.5 Market Characteristics

Niche Market or Broadly Based?

Some feel that Aboriginal tourism products and experiences fit into the broad-based tourism market as value-added features, such as including cultural interpretation via heritage centres and museums. Others believe it is more of a niche market that should be sold in connection with other tourism products and experiences and some believe it has both a niche and broad-based appeal. For special interest groups it is possible to design entire itineraries around visiting Aboriginal tourism products and attractions. At the same time, Aboriginal products and experiences that are market-ready fit in well with other broader-based touring itineraries.

Typical profile of Aboriginal Tourism Customers

There is some variation in what inbound receptive operators, in-market tour operators and travel agents feel are the typical profiles of their customers interested in Aboriginal cultural experiences. As an overall theme mature travellers, including empty-nesters and seniors, are prime targets for Aboriginal cultural tourism experiences, as well as those who are affluent and well-educated. Some believe there is potential to attract younger markets, particularly if the Aboriginal tourism products are packaged with more adventurous tourism experiences.

Aboriginal tourism is not seen as a family market, although two receptive operators believe there is some potential with families and of course school groups. For younger travellers the idea of winter adventures in connection with Aboriginal tourism also has an appeal (snowmobiling, dog-sledding), especially for those who have never seen snow.

Section 8: The German Trade

8.1 Background on Tour Operators and Travel Agencies

We interviewed a cross section of Canadian based inbound receptive operators that deal with the German market, along with Germany based in-market tour operators and travel agents. Of the three groups, the travel agents are the least knowledgeable about Aboriginal tourism and Canada's Aboriginal tourism products, while the receptive operators and the in-market German tour operators are generally quite knowledgeable.

Types of Canadian Tourism Products and Packages Sold

The receptive tour operators interviewed specialize in a wide range of group tours to Canada along with some FIT and specialized products including incentive/corporate travel, students and Native culture groups. The Germany-based tour operators also deal with escorted group tours and FIT travellers, including a lot of fly-drive/self-drive vacation packages, motorhome vacation packages and ranch vacations. Varying lengths of itineraries are offered with packages anywhere from 1-3 weeks in length.

The travel agents deal with individual bookings of itineraries including flights, hotels and rental cars, as well as booking individuals on FIT packages and group tours.

Regions Included in Itineraries

Three of the receptive operators essentially cover all of Canada in their itineraries (except some of the north - e.g. Northwest Territories and Nunavut). One operator focuses on Western Canada itineraries but is interested in extending Canada-wide, and another specializes in Alberta/BC and Ontario/Quebec. The Germany-based tour operators for the most part cover all of Canada (except Nunavut), with one operator focusing on Western Canada, Ontario/Quebec and Nunavut. The travel agents in some cases cover all of Canada, while others specialize more in Alberta and BC, Ontario and/or the East Coast.

8.2 General Perspectives on Aboriginal Tourism

The inbound receptive operators and German-based tour operators are quite knowledgeable about Aboriginal tourism, as well as some of the travel agents.

Countries Most Popular for Aboriginal Cultural Tourism Experiences

The receptive operators in some cases did not know. Others feel that the Maoris of New Zealand, as well as Aboriginal cultural experiences in Africa and South America are most popular. The Germany-based tour operators interviewed are more knowledgeable and all feel that Australia is most popular for Aboriginal tourism, followed by Canada, the U.S., New Zealand and South America. The travel agents also believe Australia is most popular, followed by New Zealand and the U.S. The strong promotion by the

Australian Tourism Commission is further strengthened by the Aborigines actually getting involved in some of the travel trade shows and marketplaces.

Mention was also made of South Africa and Mexico. Tour operators indicate that the North American Aborigines are considered popular by German travellers because of the Karl May books and exhibits on North American Indians in German museums.

Terminology Used to Refer to Aboriginal Tourism

“Indians” or “Indianer” are the most common terms noted by the inbound receptive operators, tour operators and travel agents. Other terms recognized included “Aboriginal”, “Native Americans” (in the case of US Aborigines), and “First Nations”. Clearly the terms most commonly used in the Canadian market (Aboriginal and First Nations) are fairly well known, at least to the knowledgeable travel trade dealing with the German marketplace.

Kinds of Aboriginal Experiences Travellers are Looking For

German travellers are clearly looking for authentic cultural experiences and believe that Aboriginal tourism is a way of meeting the people, seeing how they lived in the past and providing insight into their way of life past at present. Specific types of experiences noted include:

- Visiting traditional villages and seeing traditional performances such as dancing
- Having the opportunity to live in an authentic Aboriginal setting for a few days, experiencing the outdoor natural environment and activities such as fishing, canoeing, nature walks
- Attending pow-wows and staying overnight in an authentic tepee
- Experiencing traditional cuisine, including a salmon bake in the case of West Coast Aborigines
- Opportunities to meet the people, interact with them and learn about their culture
- Nature-viewing with an Aboriginal guide.

Aboriginal Only or Part of Broader Itinerary

For the most part German travel agents and inbound operators feel that Aboriginal tourism is part of a broader itinerary. Some inbound operators have tried more specialized itineraries, but feel there are not enough Aboriginal products offered of suitable quality. One tour operator noted that there is a market niche for specialized Aboriginal tourism vacations and they had even had a group spend 3 weeks in Invermere, BC, including 10-15 days on a Reserve. It was generally agreed that there is only a very small market niche with a specialized interest in Aboriginal only itineraries. For the most part, visits to Aboriginal communities and attractions are and will continue to be a part of broader-based itineraries.

Other Activities of those Interested in Aboriginal Tourism

Quite a broad range of cultural tourism and outdoor adventure/ecotourism activities are undertaken by German travellers who have an interest in Aboriginal tourism. Among the various activities noted are the following:

- Experiencing Aboriginal culture including interpretative attractions, arts and crafts, performances such as dances, spending the night in a tepee
- Outdoor adventure activities including hiking, canoeing, horseback riding
- Nature appreciation activities including various types of wildlife viewing (e.g. whale watching, bear watching) and guided nature walks
- Sampling local cuisine.

8.3 Canada's Aboriginal Tourism Experiences

The inbound receptive operators and German-based tour operators appear to have fairly good knowledge about Canada's Aboriginal tourism experiences, while the travel agents are much less knowledgeable.

What Canada Offers in Terms of Aboriginal Experiences

The inbound receptive operators and German based tour operators realize that Canada offers a whole variety of Aboriginal tourism products and experiences and they are certainly familiar with a number of them. They understand that a variety of museums and cultural experiences are offered, along with opportunities to take a canoe trip with Aboriginals and hear their stories. Among the specific Aboriginal tourism products and exhibits that were noted are:

- Quw'utsun' Cultural & Conference Centre in Duncan, BC
- 'Ksan Historical Village in Hazelton, BC
- Head Smashed In Buffalo Jump, near Fort MacLeod, Alberta
- The Temagami region of Northern Ontario
- The Great Spirit Circle Tour on Manitoulin Island
- The Nk'Mip of the Osoyoos area in the South Okanagan
- The Luxton Museum in Banff, which has an Aboriginal exhibit.

How Canada's Products Measure Up to those of Other Countries

For the most part the inbound receptive operators do not have a sense of how Canada's Aboriginal tourism products and experiences measure up to those of other countries. One operator believes that Canada's Aboriginal products are unique, but is not sure whether they measure up to those in Australia for example.

The German-based tour operators, on the other hand, feel that Canada's Aboriginal tourism products and experiences do measure up to those of other countries, such as the Aborigines in Australia and Maoris in New Zealand. They believe that Canada's experiences appear to be more professional than those in Australia, and that the Maoris are offering less authentic experience with their elaborate shows. German travel agents feel that Canada's Aboriginal tourism products do measure up to those in other countries.

Image of Canada's Aboriginals Overseas

For the most part, receptive tour operators and German based tour operators indicate that the image of Canada's Aboriginals is generally positive, although a couple were not certain of this as a result of negative media they had been exposed to. One receptive operator notes that it can be difficult doing business with Aboriginal tourism organizations that in some cases are not well-organized and may not show up for appointed activities.

On the positive side, they realize that the roots of history associated with Aboriginal cultures are very old compared to that of European North Americans. One operator believes the image of Aboriginals in Canada is more positive than in the U.S. and another believes that the Canadian Aboriginals tend to be more reliable and professional than those in Australia.

On the negative side, German tour operators that have experienced some Aboriginal communities in Canada feel that their clientele were not previously aware of the extent of poverty on some of the Reserves and that this was really a culture-shock.

Pre-conceived Ideas of Aboriginals in Canada

German receptive operators believe their clientele have images of teepees, wearing headdresses, hunting buffalo, riding horses and performing in pow-wows. Among the German-based tour operators there is a greater awareness of the U.S. Aboriginals and the image of them with their headdresses. Some operators stressed that their clientele do not have a realistic sense about Canadian Aboriginals and are certainly surprised to see them driving pick-up trucks when they visit modern-day Aboriginal communities. They are really expecting to see them with their traditional headdresses on and these images are largely the result of the Karl May books and Hollywood movies. Most operators realize that this is not the reality of today and they try to educate their clientele on what to expect.

8.4 Marketing and Packaging Canada's Aboriginal Tourism Products

The receptive operators and the German-based tour operators offered considerable insights and suggestions with regard to marketing and packaging Canada's Aboriginal tourism products, and the travel agents also had a few suggestions.

How Aboriginals and Aboriginal Cultural Tourism Experiences should be Portrayed

There is general agreement that authentic Aboriginal cultural tourism experiences should be those portrayed in the marketplace, highlighting the uniqueness of the different Aboriginal cultures across Canada, the types of experiences that visitors can enjoy, and how Canada's First Nations are a unique culture.

Also, it is important to demonstrate how Aboriginal tourism products and experiences will fit into a broader tourism package or tour itinerary. One travel agent noted that the Great Spirit Circle Tour is an ideal example of how to portray Aboriginal cultural tourism experiences in Canada. The tie-in of First Nations with the natural environment is also an important element to portray in the marketplace, as Germans have a strong inherent interest in Canada's outdoor wilderness environment.

Aboriginal Products Included in Current Packages

A number of the inbound operators and German-based tour operators are including Aboriginal tourism products in some of their tour itineraries and packages. Among the specific products and experiences noted, primarily by the inbound receptive operators, are the following:

- BC Aboriginal tourism products including Tsa-Kwa-Luten on Quadra Island, Nk'Mip in the Southern Okanagan, Quaaout Resort near Chase
- Turtle Island in the Ottawa area
- Humalka wildlife tours
- A teepee village that was a feature at the Calgary Stampede
- Head-Smashed-In Buffalo Jump
- Wanuskewin Heritage Park in Saskatchewan.

With regard to why Aboriginal tourism products are not more often included, it was noted that some of the communities can be difficult to work with and are either very remote or in some cases not market-ready. In the case of FIT and fly-drive travellers the itineraries are not as pre-programmed, so the travellers may or may not visit Aboriginal attractions.

Growth Market for Canada?

Most of the inbound receptive operators and German-based tour operators felt that this is a growth market for Canada as there are some good products available. However, it is important to do it right and there may need to be changes in some of the products to better cater to individuals and groups. At present the strong Canadian currency is a disadvantage, making the U.S. a cheaper comparable alternative. The travel agents feel that it is a growth market for Canada, in part because it is starting from such a small base at present. They believe that the U.S. Aboriginal tourism product base is stronger than that available in Canada.

Barriers to Growth

A number of different suggestions were made with regard to barriers to growth in Canada's Aboriginal tourism sector including the following:

- There is a general concern about the reliability of dealing with Aboriginal tourism organizations. Communications are not always reliable and there can be considerable staff turnover and lack of follow-through at times.
- There is a need for up-to-date new products in order to achieve growth
- The comment was made that the Reserves themselves are untidy and that on-Reserve communities are unappealing to visitors and need to upgrade their physical appearance. This was attributed to a lack of money available to improve public buildings, businesses, housing and infrastructure in Native communities.
- Casinos are not really the best way to go as they do not showcase Aboriginal culture and are not really appropriate tourism products for them.
- Another major barrier to growth noted is inadequate awareness, requiring much more advertising and promotion about Canada's Aboriginal tourism products and experiences.
- Accommodations at or near Aboriginal tourism attractions and communities are generally inadequate - too small and not always of the right standard for target markets.

What Stakeholders in Canada's Aboriginal Tourism Sector Can Do to Achieve Growth

The receptive operators are most concerned that Aboriginal tourism businesses and attractions be more professional and have a better understanding of the expectations of international travellers. There is a need to work within timeframes agreed to and be fully committed to arrangements made, sometimes a year in advance. They also feel that in addition to adopting common business practices and delivering on promised facilities and services, there is a need for more advertising and promotion, plus additional product development advice and financial assistance.

The German-based tour operators also stressed the importance of more advertising and promotion and maintaining high standards in terms of Aboriginal tourism products and services. With good products, reliable companies and unique experiences there is a great opportunity to attract special interest markets. Tying-in Aboriginal experiences with fishing trips and wilderness canoeing is considered to have strong appeal in the German market. Also, having available suitable accommodation facilities near Aboriginal attractions and communities is essential.

It was also noted that it is important to attract media interest in Germany and broadcast information about Aboriginal tourism products and experiences in the German marketplace. One of the travel agents suggested that there should be special courses for Canada's specialist travel agents in Germany to better educate them about Canada's Aboriginal tourism products and experiences.

How Canada's Aboriginal Attractions Should be Positioned and Portrayed

Inbound operators noted that it is essential to be realistic, portraying the actual culture and not overly commercializing it. It is felt that the Canadian experience can focus more strongly on cultural historical icons and highlight its uniqueness relative to that of the U.S. It is also essential that Aboriginal tourism products and experiences are well tied-in with popular tourism destination areas.

Specialist Aboriginal tourism attractions and experiences brochures, such as the one published by Aboriginal Tourism BC, are helpful. This contains a fairly extensive compendium of different types of Aboriginal tourism products and experiences, which provide tour operators, inbound operators and travel agents with a better idea of what types of products are available. This should be widely distributed at major travel trade marketplaces such as ITB.

The tour operators indicate that the Aboriginal cultural experience can be nicely integrated into Canada and its history and be positioned as a quality heritage experience. They suggest that the regions within Canada should promote the different types of Aboriginal tourism products and experiences they have to offer. Promotions undertaken in the German marketplaces should promote authentic cultural experiences and not have Indians in headdresses, which reinforces a misleading expectation of what they will most likely experience.

Most Effective Media to Reach Target Prospects

Suggestions made regarding the most appropriate media opportunities were fairly wide-ranging and included television, daily newspapers, the Internet, and travel magazines. They also mentioned the importance of marketing to tour operators and the travel trade (including ITB), where First Nations representatives should be part of Canada's and some of the provinces' presence there. Specific publications mentioned include *Aboriginal Wings*, *Geo*, *FAZ* (*Frankfurter Allgemein Zeitung*) and *Sud-Deutsche*

Zeitung Travel Section. It was also suggested that Travel Alberta and Tourism BC should be strongly promoting Aboriginal tourism products and experiences, given the extent of these products in these two provinces.

How the CTC and Other Agencies Can Help the German Travel Trade Promote Aboriginal Tourism

A whole range of suggestions were made including the following:

- It is critical that the CTC provide more awareness building via more marketing and promotion, particularly getting more information to the German public about Aboriginal tourism products and experiences
- Ensuring that at local tourism offices in Germany for the CTC and the provinces that Aboriginal tourism products and experiences have a much higher profile and receive a lot more advertising and media exposure
- Cooperative marketing and promotion of the CTC and Aboriginal organizations in the German marketplace
- Support of receptives and tour operators with more local television advertising that features Aboriginal tourism products and experiences
- Fam trips for German media, ensuring that the right information is provided. These trips could be partnered with tour operators and inbound receptive operators
- The CTC could select some special First Nations attractions and experiences that include historic sites and unique cultural experiences and then strongly promote them
- Cooperative marketing and promotion with tour operators, along with support in brochure development and other marketing activities
- Partnering in marketing and promotion campaigns with tour operators and generally providing more information and promotion on Aboriginal tourism products and experiences
- The use of special brochures and promotional materials would be helpful
- Some noted the need for product development assistance to help Aboriginal communities develop better tourism products and services.

8.5 Market Characteristics

The receptive inbound operators and German-based tour operators offered the most comments about the market characteristics of their clientele.

Is Aboriginal Tourism a Niche Market or Broadly Based?

In contrast to the UK market, most of the inbound receptive operators and German tour operators really believe that Aboriginal tourism is a niche market and not broadly based. Some indicated that Aboriginal tourism products and experiences can fit into broader-based tourism itineraries and packages, particularly those with a more adventure-orientation. Aboriginal tourism products that have good capacity to deal with groups could fit in well with group tour itineraries.

Typical Profiles of Customers

According to the German travel trade, seniors and mature travellers are the prime markets. It is not considered a family market, although there may be some potential for younger travellers as part of FIT packages. For example, couples in the 40 - 55 age range, who are well-educated and affluent, may be a strong potential market.

It seems that the market characteristics vary from operator to operator, suggesting that different tour operators and receptive operators are able to tap into different demographic market segments in the German marketplace.

Section 9: The French Trade

9.1 Background on Tour Operators and Travel Agencies

Similar to the U.K. and German markets, we interviewed a cross-section of inbound receptive operators based in Canada, in-market tour operators based in France, and in-market travel agents in France. As with the German and UK markets, the inbound receptive operators and in-market tour operators were clearly the most knowledgeable, although some of the French travel agents with significant knowledge of Canada were helpful.

Types of Products Sold Featuring Canada

Inbound receptive operators indicated they sell a full range of group tours, FIT packages and even special interest tours to Canada. Some Manitoba based receptive operators feature the polar bears of Churchill and Northern Lights tours in addition to featuring some French Canadian products and experiences. The receptive operators also offer a full range of fly-drive vacations, nature and soft adventure tours, hard adventure tours and even incentive travel groups.

The France-based tour operators have a strong focus on fly-drive, FIT packages of one sort or another, with only a small component of escorted group tours. They also feature winter outdoor adventure activities including snowmobiling, plus summer hunting and fishing packages. The travel agents also book a lot of fly-drive and FIT packages and arrange individual itineraries for travellers, with a fairly strong focus on Quebec, Ontario plus Alberta and BC.

Regions Included in Itineraries

Some of the receptives and tour operators include all or much of Canada from coast to coast, while two operators were based in Manitoba and focus on Manitoba-based tourism products and other operators focus on Ontario/Quebec and Alberta/BC. The travel agents also emphasize Quebec, Ontario, BC and Alberta, although one agent includes New Brunswick and Nova Scotia, both of which have French-speaking communities. The French Islands of St. Pierre and Miquelon (off Newfoundland) are included in one tour operator's itineraries.

9.2 General Perspective on Aboriginal Tourism

The inbound receptive operators and tour operators have good knowledge of Aboriginal tourism products and experiences, as do some of the travel agents.

Countries Most Popular for Aboriginal Cultural Tourism Experiences

Australia, because of its highly visible promotion which features the Aborigines and their culture, is considered most popular by the French travel trade. The French receptive operators also noted Peru as an Aboriginal tourism destination and one

operator noted that Canada is perhaps the most popular because of areas like Manitoulin Island with some well-developed Aboriginal tourism products and experiences. Other countries associated with Aboriginal tourism by the French include the U.S., New Zealand, South Africa, and Mexico. The other countries mentioned include Peru, Bolivia and Chile, as well as South Africa, Botswana and Zimbabwe, plus some of the Pacific Islands such as Tahiti, the Marquesas Islands and Fiji. There was little mention of Canada as being most popular for Aboriginal cultural tourism.

Terminology Used to Refer to Aboriginal Tourism

As with the UK and German markets, more than one term is common depending on the tour operator or travel agent. The receptive operators were more focused on English terminology and mention “Aboriginals”, “First Nations” most predominantly as well as “Indians”, “Amerindien” or “Natives”. Most of the tour operators feel that the correct Aboriginal term to use in the French marketplace is Autochtone, although some travel agents in France use the term Amerindien.

Kinds of Aboriginal Experiences Travellers Are Looking For

The French are looking for an authentic Aboriginal tourism experience which can be hard to find. They have a strong interest in traditional dance, history, culture, making some of the crafts such as dream-catchers and doing beadwork. They are particularly interested in staying in a teepee on a Reserve, which they perceive as authentic Aboriginal communities. Other cultural experiences of interest include authentic ceremonies, hoop dancers, sweat lodges, and pow-wows.

The France-based tour operators emphasize that they do not have a desire to “intrude like neo-colonialists” and want a small scale, face-to-face type of experience where they have a chance to meet Aboriginal people, learn about their history and culture, and how things have changed over the centuries. They want a totally authentic experience that is not artificial or “put on”. They want to sleep in a teepee, eat traditional Aboriginal food, meet the people, see how they live and hear their stories.

Aboriginal Experiences Part of a Broader Itinerary?

The French travel trade indicate that Aboriginal tourism products and experiences are primarily part of a broader itinerary. These attractions and features should be integrated into broader mainstream itineraries and adequate accommodations should be available nearby (but do not necessarily need to be Aboriginal owned and operated).

Other Activities Those Interested in Aboriginal Tourism Participate In

Soft adventure, nature viewing, and wildlife viewing activities are the primary activities mentioned by inbound receptive operators and the France-based tour operators. Specific examples of soft adventure activities include canoeing, hiking, fishing, and

nature viewing activities such as wildlife viewing (e.g. polar bears in Manitoba) - especially wildlife viewing guided by a native. There is also a strong interest in museums, sightseeing, history and arts and cultural activities generally.

9.3 Canada's Aboriginal Tourism Experiences

As with the UK and German markets, for the French market the inbound receptive operators and the France-based tour operators were the most knowledgeable about Canada's Aboriginal tourism experiences. Some of the Canada Specialist travel agents in France had some knowledge of Canada's Aboriginal Tourism products.

What Canada Has to Offer

The inbound receptive operators had fairly specific ideas about what Canada offers in terms of Aboriginal experiences that would appeal to the French market including:

- Spending a night in a teepee camp, managed by Natives
- Learning about the traditional culture and use of plants for medicinal purposes
- Visiting Native villages and being immersed in their culture, such as in the James Bay and Hudson Bay areas
- The opportunity to cook over an open campfire and sample traditional cuisine such as Bannock bread.

The France-based tour operators feel that local Aboriginal communities should develop their products and should not be trying to cater to the mass market. They strongly believe it is really important to keep it authentic and unique and there are concerned about some aspects of Aboriginal tourism experiences that are not authentic, such as some of the souvenirs being sold at Wendake in Quebec, which are made in China and not authentic to the area. Some specific Aboriginal experiences noted include Wendake in Quebec, Kinjuwah in Northern Quebec, the Museum of Civilization in Ottawa (which has good Aboriginal exhibits), as well as Quadra Island on the West Coast. The travel agents seem to be most aware of Aboriginal tourism products in BC and Alberta, as well as the Innu, and like the opportunities to meet Aboriginal people.

How Canada's Aboriginal Products Measure up to Those of Other Countries

This line of questioning received a mixed response and some receptive operators did not have a realistic idea of how Canada's Aboriginal products measure up to other countries. One operator believes that they do measure up and a couple of others feel this is not yet the case, particularly as many of the many communities are remote. On the other hand there is also a feeling that some countries push it to the extreme offering packages experiencing Aboriginal communities in the wilderness and then staying nearby in a five-star hotel. Only one of the France-based tour operators interviewed feels that Canada's Aboriginal tourism products measure up to other countries. One operator believes that Africa has a stronger Aboriginal product base.

One of the travel agents notes that Australia features a lot more Aboriginal products in tourism marketing and promotion.

Image of Canada's Aboriginals

Across the board the French inbound receptive operators, tour operators and travel agents all feel that the image of Canada's Aboriginals is generally positive. Reasons given for this include the fact that the Aboriginals are "one with nature" so they are tied-in with the natural environment, which has a strong appeal. Aboriginal culture is really an icon for Canada and the products and experiences are quite different between the east and the west.

On the negative side the receptive tour operators indicate that dealing with Aboriginal businesses and communities can be very inconsistent and unreliable. The note that frequently a product or service promised is not delivered or not adequately delivered, and sometimes guides don't show up. There are also concerns about some of the negative publicity around land claims, residential schools and alcohol abuse. Another concern is lack of authenticity at times, particularly in relation to selling Aboriginal crafts and souvenirs, which are not always authentic. There is also a need for more Aboriginal tourism products and experiences and tour operators had some specific concerns about selling Aboriginal tourism products because of previous bad experiences.

Preconceived Images of Canada's Aboriginals

The receptive operators indicate that the Aboriginals have been romanticized in movies and books and are noted for their headdresses and long hair, which sets them apart from the rest of North American society.

The France-based tour operators say that some of their clientele can be quite disappointed as they are unlikely to see Aboriginals wearing headdresses, so there is a gap between what they imagine an Aboriginal tourism experience to be like and what it is actually like. It is important that they know what to expect.

Most of these preconceived images are a result of Hollywood movies and books, although it is suggested that the same media could be used as tools to change the misperceptions by providing more up-to-date portrayals of Aboriginals.

9.4 Marketing and Packaging Canada's Aboriginal Tourism Products

How Aboriginal Cultural Tourism Experiences should be Portrayed

In order to appeal to the French market, it is critical that Aboriginal tourism products be authentic and feature the cultural heritage, including unique experiences such as traditional dances, as well as featuring the natural environment and outdoor experiences such as wildlife viewing. They are interested in the relationships of the Aboriginals to the indigenous flora and fauna. Aboriginal cultural tourism experiences should be portrayed as being interesting, adventurous, accessible, first-class and providing a very special experience. One of the tour operators stressed that it is essential to include Aboriginal cultural tourism experiences in brochures promoting tourism in Canada. Other appropriate portrayals included experiencing an evening around a campfire, sleeping in a teepee village, and the traditional music and dancing in an Aboriginal community.

Aboriginal Products Included In Current Packages

The inbound receptive operators, France-based tour operators and some travel agents already include Aboriginal products in current packages they offer or sell. Some of the inbound operators include overnight stays in teepees. Among the specific Aboriginal tourism experiences mentioned were a tent adventure at Mikuan, visits to the Aboriginal Cultural Centre at Duncan (Quw'utsun') and Tsa-Kwa-Luten on Quadra Island.

France-based tour operators include Lac Eduard Lodge and Sunomie du Triton, while a French travel agent sends business to Aboriginal communities in the Lac St. Jean area of Quebec and to Tuktoyaktuk in the Northwest Territories.

Inbound tour operators are concerned that the unreliability of Aboriginal tourism products and services constrain them when these products are included in packages and itineraries. Some Aboriginal attractions offer unique experiences but do not publicize them such as the Thunderbird House, which has a solstice/sunrise ceremony. Many of the Aboriginal tourism products and experiences are "off the beaten path" and not that accessible or can be very expensive in terms of access.

One French tour operator suggests that the receptive operators are really not that interested in selling Aboriginal tourism products and experiences as they would rather sell large room allotments in big city hotels. A lack of awareness is another factor conspiring against including Aboriginal products in packages and itineraries.

Growth Market for Canada?

It was widely agreed by all of the receptive operators, France based tour operators, and travel agents interviewed that Aboriginal tourism is a growth market for Canada. It is essential that Aboriginal tourism businesses and organizations become more professional and reliable as tourism suppliers. Receptive operators note that there are more requests for Aboriginal tourism products and experiences, as travellers are looking for unique experiential vacations. Accessibility of some of the attractions for groups is sometimes more difficult because of remote locations and limited availability of transportation services that can adequately handle group tours. French tour operators are getting more requests than before for Canadian Aboriginal tourism products. The travel agents feel that more special promotion is needed to achieve this growth.

Barriers to Growth

Several barriers to growth are identified by the inbound receptive operators and France-based tour operators including:

- Unreliability and lack of professionalism, combined with the remoteness of Aboriginal communities are considered major barriers
- Canada's Aboriginal tourism products do not meet pre-conceived expectations of French travellers, based on what they have read in books and seen in the movies
- In some cases the staff at Aboriginal tourism operations and facilities are inadequate and do not know how to present themselves well
- Tour operators feel that there is a lack of real product available and it is difficult to sell - consumers have lots of questions and it is difficult to provide the answers and explain the types of experiences they will have. There is clearly a lack of accurate knowledge among French consumers.

What can Canada's Aboriginal Tourism Stakeholders Do to Grow the Market?

The receptive tour operators offered very specific suggestions including the following:

- Start from the bottom up and work as a group to develop suitable Aboriginal tourism products and experiences
- Ensure that there are appropriate overall umbrella associations with specific sets of standards, booking procedures, and a website featuring Aboriginal tourism products and services
- Offer more packages and make them more accessible
- While casinos may bring in money, it is important to show alternative Aboriginal tourism products featuring their cultural heritage
- Aboriginal tourism operators should contact tour operators and explain their programs and offerings - this is a process that could take years.

France-based tour operators also offered a few specific suggestions including better promotion and information available on the Internet, such as a website PowerPoint Presentation from the CTC and presentation of a broader range of products. It is important that Aboriginal tourism operators have specific products they can sell through the receptive inbound tour operators. Substantially increased advertising and promotion is essential, as is provision of more information on Aboriginal tourism products and experiences. This is something new and different than Canada's traditional nature-based tourism products ("Rocky Mountains etc).

The travel agents feel that much more marketing and promotion is essential by the CTC and that receptive tour operators need more products to sell. They also note that it is important to receive the French visitors well and know their values, which may be different than visitors from other markets.

How Should Canada's Aboriginal Attractions be Positioned and Portrayed?

The inbound tour operators are concerned that many of Canada's Aboriginal tourism attractions are not yet market-ready. For those that are, they should be portrayed in terms of their authenticity and role in the history and culture of Canada. The France-based tour operators are concerned that the Aboriginal tourism products need to be more reasonably priced so that they are more affordable. Also, it is essential to focus on the people with regard to Aboriginal tourism experiences, rather than emphasizing nature. French visitors want to be part of the life of the people. Their way of living should be portrayed and promoted including the hunting, fishing and trapping.

Most Effective Media to Target Prospects

Suggestions here include newspapers, trade shows, the Internet, outdoor/adventure magazines, media familiarization tours, and tour operator familiarization tours. Specific publications include Grand Reportage and O Quebec Magazine. One travel agent suggests that having advertisements and editorial copy on Canada's Aboriginal tourism products and experiences in France's travel trade publications would be helpful.

How the CTC or Other Agencies Can Help

Suggestions made by inbound receptive operators include the following:

- Specific marketing and promotion regarding Aboriginal tourism products and experiences to the travel trade to French consumers
- Ensuring that standards are set for Aboriginal tourism products in order to improve product quality and reliability
- The CTC and provincial tourism agencies should advise the French travel trade on what new products and services are available
- Some inbound operators feel it would be helpful to receive financial assistance for marketing and promoting Aboriginal products and experiences.

France-based tour operators believe that more familiarization tours would be helpful as well as Internet marketing and promotion of Canada's Aboriginal tourism products and experiences, ensuring that appropriate websites are optimized on key search engines used by the French.

- Presentations and more information available at tourism offices, as well as videos would be helpful.
- Tour operators indicate it would be easier to sell the product if they have at least seen videos and detailed information and promotional material.
- Familiarization tours for sellers of Canada's Aboriginal tourism products and services would be helpful, as well as media familiarization tours.
- France-based tour operators believe that it would be helpful to better train the receptive tour operators on where to go, what to do and what Aboriginal tourism products and services are available.
- It is felt that the CTC does do some little things in relation to Aboriginal tourism products, but needs to undertake a larger scale initiative
- One tour operator has its own media department who are in constant contact with the French media. If the CTC sends appropriate promotional material, stories and information to this tour operator's media department they would send it around to all of the relevant newspapers.

In terms of the type of help that would best be provided by the CTC, there is again a strong emphasis on awareness building and enhanced marketing and promotion. Product development is a critical issue and it is important to think about what the French travellers area looking for. While some may wish to sleep in a tepee, others prefer to have the comfort of first-class hotels, motels and lodges. Aboriginal tourism operators need to be market-ready and should be incorporated into trade shows that the CTC participates in. Authenticity should again be emphasized. It was noted that Turtle Island for example, does not look real and authentic.

9.5 Market Characteristics

Aboriginal Tourism a Niche Market or Broadly Based?

For the most part the French travel trade feels that Aboriginal tourism is a niche market, particularly as there is not enough market-ready product available to cater to a more broadly-based market. Some receptive operators and tour operators, however, felt that the market is broadly based if Aboriginal products are included as features in itineraries that include many non-Aboriginal tourism products and services.

Typical profiles of Customers Interested in Aboriginal Cultural Experiences

As with the UK and German markets, it appears that different receptive operators and in-market French operators cater to a range of demographic segments. However, there is a fairly broad consensus that middle age travellers and seniors, particularly couples, are the prime market. There is also some potential with the families market and younger travellers. Middle income and affluent travellers are predominant. The younger travellers tend to take the more adventurous itineraries.

Appendix

Online Survey

Insignia Marketing Research Inc.

November 23, 2007
(REVISED)
L1101-07

Indigenous Tourism Cultural Experience Study

This is a follow-up to a survey that we conducted recently on overseas travel. We very much appreciated your input and would like to ask you a few more questions.

- 1) First, when travelling overseas, how appealing to you is the opportunity to see aboriginal culture attractions, celebrations and experiences first hand?

Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

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- 2) Which overseas countries come to mind when you think of aboriginal cultural attractions and experiences? Any others?

- 3) Just based on your own impressions, how interesting would the aboriginal cultural attractions, celebrations and experiences be to you personally in each of the following countries or regions?

	Extremely Interesting	Very Interesting	Fairly Interesting	Not Very Interesting	Not At All Interesting	No Idea
Australia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
South East Asia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
South/Central America	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Zealand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Africa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 4) Overall, how interested are you in visiting Canada during the next 5 years?

Extremely interested ☐
Very interested ☐
Fairly interested ☐
Not very interested ☐
Not at all interested ☐

SKIP TO Q. 10

- 1 -

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November 23, 2007
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- 5a) On that next trip to Canada, what would be all your reasons for travelling? (Check as many as apply).

- 5b) Which of those would be your main reason for travel on that trip? (Please check one only) [PN: SHOW THOSE CHECKED IN Q.6A]

	6a)	6b)
To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees, beaches, and mountains	<input type="checkbox"/>	<input type="checkbox"/>
Honeymoon	<input type="checkbox"/>	<input type="checkbox"/>
To experience local culture	<input type="checkbox"/>	<input type="checkbox"/>
To interact with the local people	<input type="checkbox"/>	<input type="checkbox"/>
To visit historic sites, museums, or galleries	<input type="checkbox"/>	<input type="checkbox"/>
To visit protected areas, including Nature Reserves, Regional or National parks	<input type="checkbox"/>	<input type="checkbox"/>
- (In Germany: to visit Naturschutzzonen und/oder Naturreservate oder)		
- (In France: to visit Parc naturel national ou Parc naturel régional)		
To attend festivals and/or events	<input type="checkbox"/>	<input type="checkbox"/>
To see and watch wildlife	<input type="checkbox"/>	<input type="checkbox"/>
To see aboriginal cultural attraction, celebrations, experiences	<input type="checkbox"/>	<input type="checkbox"/>
For entertainment and nightlife	<input type="checkbox"/>	<input type="checkbox"/>
To go shopping	<input type="checkbox"/>	<input type="checkbox"/>
To go downhill skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
To see new places	<input type="checkbox"/>	<input type="checkbox"/>
To visit a spa, health centre, or hot springs	<input type="checkbox"/>	<input type="checkbox"/>
Low rates, good deals, and discounts	<input type="checkbox"/>	<input type="checkbox"/>
To relax, unwind, and decompress	<input type="checkbox"/>	<input type="checkbox"/>
To participate in outdoor activities	<input type="checkbox"/>	<input type="checkbox"/>
To visit friends and relatives	<input type="checkbox"/>	<input type="checkbox"/>
A trip that combined business with pleasure	<input type="checkbox"/>	<input type="checkbox"/>
To realize a long term dream	<input type="checkbox"/>	<input type="checkbox"/>
To experience big cities in another country	<input type="checkbox"/>	<input type="checkbox"/>
To be together as a family	<input type="checkbox"/>	<input type="checkbox"/>
Other reasons	<input type="checkbox"/>	<input type="checkbox"/>

- 6) On your next trip to Canada, how would you rate your interest in seeing aboriginal cultural attractions, celebrations and experiences first hand?

Extremely interested ☐
Very interested ☐
Fairly interested ☐
Not very interested ☐
Not at all interested ☐

SKIP TO Q. 10

- 2 -

7) How do you typically refer to the indigenous people of Canada: (ROTATE ORDER) (ALLOW MORE THAN ONE ANSWER)

- Indigenous people ☐
 First Nations ☐
 Aboriginal people ☐
 Indians ☐
 Natives ☐
 Inuit ☐
 Some other term (please specify) _____
 Not Sure ☐

8) In terms of aboriginal cultural attractions, celebrations and experiences in Canada, how desirable would experiencing each of the following be to you on a trip to Canada? (ROTATE ORDER)

	Extremely Desirable	Very Desirable	Fairly Desirable	Not Very Desirable	Not at all Desirable
To visit aboriginal places I learned about in childhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To observe craft making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To participate in craft making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To walk on ancient aboriginal trails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To see the way they used to live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To see the way they live today	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To understand their spiritual belief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To stay overnight on-site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To stay in an authentic aboriginal longhouse, tepee, wigwam, igloo or pit house	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To sing/chant their songs with them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To purchase their arts and crafts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To watch ceremonial dances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To participate in ceremonial dances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To view artifacts (masks, bowls, totems)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View and / or purchase authentic aboriginal crafts and handiwork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hear aboriginal legends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hear aboriginal languages being spoken	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hear aboriginal songs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Try traditional and modern cuisine prepared by aboriginal people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Learn about traditional use of the land by aboriginal people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tour certified authentic aboriginal facilities (e.g., teepees, longhouses, kekuli)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tour aboriginal museums and art galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meet and interact with friendly local aboriginal people in their communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take part in outdoors adventures / tours with aboriginal guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take photographs of aboriginal people and cultural sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit pristine wilderness areas with aboriginal guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To see and meet modern aboriginals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9a) Are there any particular regions of Canada where you would like to experience aboriginal culture?

- Yes ☐
 No ☐ **SKIP TO Q.10**

9b) Which regions in particular? (CHECK ALL THAT APPLY)

- British Columbia (west coast) ☐
 Alberta (Rockies/Prairies) ☐
 Saskatchewan (Prairies) ☐
 Manitoba ☐
 Ontario ☐
 Quebec ☐
 Atlantic Canada (east coast) ☐
 Yukon Territory (north) ☐
 North West Territories (north) ☐
 Nunavut (north) ☐

- 10) (ROTATE CONCEPTS) Here is the first of a series of seven Canadian aboriginal cultural attractions that we would like to show you.

Haida Heritage Centre at Kaay Linagaay



www.haidaheritagecentre.com

The new Haida Heritage Centre is located in the Queen Charlotte Islands off the coast of British Columbia. It celebrates a living culture dating back some 12,000 years.

This spectacular Centre, owned and operated by the Skidegate Band, is located at an old Haida seaside village site.

Fronted with six traditional totem poles representing each of the 14 clans, the Centre resembles a series of Haida longhouses and showcases the unique living culture, art and history of the Haida people.

This world-class Centre encompasses the Haida Gwaii Museum, extensive exhibits and audio-visuials, the Bill Reid Teaching Centre, Performing House, Carving Shed, Canoe House, gift shop and Eating House cafe.

Visitors to the Centre have the opportunity to enjoy the following activities:

- ◆ Tour the Centre and Haida Gwaii Museum with a Haida guide
- ◆ View the exhibits, artwork and audio-visuials in the Haida Gwaii Museum
- ◆ Learn about the monumental totem poles outside the centre and inside in the Pole Gallery, as well as traditional Haida canoes in the Canoe House
- ◆ See carvers actually carving totem poles and canoes in the Carving Shed
- ◆ Paddle with Haida guides in the famous *Loo Taa*, a traditional Haida sea-going dugout canoe, carved by world famous Haida artist Bill Reid
- ◆ Purchase Haida art, crafts and souvenirs in the "Trading House" gift shop
- ◆ Experience traditional performances (e.g. - music, dancing, drumming, story-telling) in the "Performing House"
- ◆ Learn about preparation of traditional foods and sample traditional Haida cuisine in the "Eating House"

- a) How appealing is this particular aboriginal attraction to you?

Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

- b) (IF EXTREMELY OR VERY APPEALING IN a) ASK) Which elements of that attraction do you find the most appealing, if any? Anything else?

- c) How many days would you like to spend visiting this attraction?

_____ Days
No idea ☐

- 11) (ROTATE CONCEPTS) Here is another Canadian aboriginal cultural attraction that we would like to show you.

Moccasin Trail Tours



Source: www.moccasintrailtours.com

Our homeland is an ancient landscape where echoes of the past stir the soul. For over 9,000 years, our First Nations people have protected and looked after the lands — and now we invite the world to come and see the northern landscape through our eyes. Watch polar bears and belugas. Discover ancient burial grounds. Paddle historical waterways. Trek through rugged tundra. Travel by freighter canoe, train, and floatplane.

Feast on traditional foods. Stay in tipis. Explore remote Native communities. Experience one of the last true adventure vacations in the world. At the end of the day, gather around the crackling campfire to hear the Elders speak of ancient legends... and later, watch the Aurora Borealis sky dance to the rhythm of the universe. Enjoy one of our fully pre-packaged guided tours, accompanied by a Native guide.

- **Hudson Bay and James Bay Coastal Tour.** Your tour starts with an overnight in Moose Factory at the Cree Village Ecolodge and you will visit a Hudson Bay Company historic site, the Moose Cree Indian Reservation, and the Cree Cultural Interpretive Center.
- **Hudson Bay Polar Bear Park Expedition.** Stay in a unique "tipi cabin" on the banks of the Winisk River, then travel by boat down river to Hudson Bay, searching for wildlife along the way – Beluga Whales, hawks, eagles, and wolves. In the evenings sit by open campfires and hear ancient stories and legends of the area.
- **Padding Quetico with a Cree Guide.** Quetico Provincial Park has been long regarded as one of the top wilderness canoeing destinations in Canada. You will be introduced to this wilderness from the perspective of your Cree Guide. He will help you to identify animal tracks, learn animal behaviour, observe wildlife in their environment, help in the setup of the camp, and listen to traditional stories around the campfire.

- a) How appealing is this particular aboriginal attraction to you?

Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

- b) (IF EXTREMELY OR VERY APPEALING IN a) ASK) Which elements of that attraction do you find the most appealing, if any?
Anything else?

- c) How many days would you like to spend visiting this attraction?

_____ Days
No idea ☐

- 12) (ROTATE CONCEPTS) Here is another Canadian aboriginal cultural attraction that we would like to show you.

Aurora Village



Source: www.auroravillage.com

Located 20 minutes east of Yellowknife, in Canada's Northwest Territories, Aurora Village is fortunate to be located directly under the Aurora Oval, which is one of the best places in the world to see the Aurora Borealis (Northern Lights). This Village of traditional tipis, designed for viewing the Northern Lights, is open from November 20th to April 15th in winter and August 15th to September 30th in the summer, which are the prime viewing times.

A number of Aboriginal cultural interpretive experiences and outdoor adventures are also offered at the Village. Visitors can participate in the following activities:

- ◆ View the Aurora Borealis in comfort from one of the best viewing locations in the world and learn about its significance to Canada's northern indigenous peoples.
- ◆ Learn how to make a dream catcher. Legend has it that the dream catchers trap the bad dreams in the web, while allowing the good dreams to pass through the centre.
- ◆ Take a dogsled ride with an Aboriginal guide or drive your own dog team.
- ◆ Take a guided snowshoe walk to a nearby lake where your Aboriginal guide will provide an explanation of how Aboriginal people traditionally relate to the land, as well as doing a fire-making demonstration.
- ◆ Enjoy an ice-fishing and snowmobile expedition travelling from Aurora Village to Fishing Point (includes hot lunch and snacks).

- a) How appealing is this particular aboriginal attraction to you?

- Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

- b) (IF EXTREMELY OR VERY APPEALING IN a) ASK) Which elements of that attraction do you find the most appealing, if any?
Anything else?

- c) How many days would you like to spend visiting this attraction?

_____ Days
No idea ☐

13) (ROTATE CONCEPTS) Here is another Canadian aboriginal cultural attraction that we would like to show you.

Blackfoot Crossing Historical Park



Source: www.blackfootcrossing.ca

Blackfoot Crossing Historical Park is a world renowned cultural-education /entertainment centre for the promotion and preservation of the Siksika Nation Peoples', Language, Culture and Traditions. For centuries the people knew about SOYOOHPAWAHKO, the ridge or bridge under the water located in Blackfoot country.

Eventually the Piikuni, the Siksika, the Kainawa, the members of the Blackfoot Confederacy, as well as other people in the area, began referring to this area as Blackfoot Crossing. The Centre is located at the historic site of the signing of Treaty No.7 and is a designated National Historic Site and has been recommended as a possible UNESCO World Heritage Site.

The entire building design is a reinterpretation of a vast range of Blackfoot culture, its sacred icons, and the everyday life of the Siksika people. Visitors can participate in the following:

- Take the "Chief Crowfoot Outdoor Tour" which will take you on a one-hour journey back into time visiting Crowfoot's last tipi site, Crowfoot's grave, the Earthlodge Village, plus many more historical sites along the way
- Enjoy the "Chokecherry Trail Eco-Tour" where a local Aboriginal guide will lead you on an interpretive hike pointing out the local flora and fauna of the valley, traditional uses for local plants, and the Siksika's long history with the buffalo and other fauna.
- Experience the "Dreaming Place Indoor Tour", which focuses on the dazzling architecture of the centre as well as the world class exhibit which covers the entire gallery floor.
- Stay overnight in an authentic tipi at "Buffalo Jump Tipi Village", where you can really take a "step back in time"
- Attend a traditional Blackfoot dance performance in the "Vision Quest Theatre"

a) How appealing is this particular aboriginal attraction to you?

- Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

b) (IF EXTREMELY OR VERY APPEALING IN a) ASK) Which elements of that attraction do you find the most appealing, if any?
Anything else?

c) How many days would you like to spend visiting this attraction?

_____ Days
No idea ☐

- 14) (ROTATE CONCEPTS) Here is another Canadian aboriginal cultural attraction that we would like to show you.

Hotel-Museum Wendake



Source: www.tourismwendake.ca/hotelmusee

Located on an enchanting site on the banks of the Akiawenrahk River, the Hotel-Museum Wendake combines the undeniable attraction of a museum devoted to the Huron Wendat culture and an unforgettable experience in a first class accommodation facility that reflects traditional Huron design forms and motifs.

In the design of its interior-exterior spaces, the building underlines the absence of propriety or limit for the Huron Wendat people, with glassed-in exhibition halls facing the wooded side and the river. The adjacent garden contains medicinal plants and other flora typical of this traditional First Nations territory.

The Wendake settlement at this location dates from the late 1600s and the Huron population originating from Wendake is approximately 3,000 individuals, of which 1,300 reside in this territory covering approximately one hundred hectares. Visitors can enjoy the following:

- ◆ High quality accommodations located in this First Nation community near historic Quebec City
- ◆ Visiting the Museum, which is part of the same complex and showcases the culture, artefacts and traditional way of life of the Huron Wendat people
- ◆ Gourmet meals in the attractive dining room featuring traditional First Nations cuisine
- ◆ The nearby "Le Huron" souvenir shop, located on the OnhoüÜ Chetek8e Huron Traditional Site, has available a great variety of art and crafts objects made by First Nations of Eastern Canada.

- a) How appealing is this particular aboriginal attraction to you?

Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

- b) (IF EXTREMELY OR VERY APPEALING IN a) ASK) Which elements of that attraction do you find the most appealing, if any?
Anything else?

- c) How many days would you like to spend visiting this attraction?

_____ Days
No idea ☐

- 15) (ROTATE CONCEPTS) Here is another Canadian aboriginal cultural attraction that we would like to show you.

Metepenagiag Heritage Park



Source: www.metepenagiag.com

On the banks of the Miramichi where the Nor'west and the Sou'west rivers meet, experience the ancient Mi'kmaq culture that has existed at its life source for over 3,000 years.

There is much to discover at the village of 30 centuries. Share their music and listen to their stories as handed down through generations by Mi'kmaq Elders, who have long greeted visitors on the banks of Miramichi.

View the archaeological finds of their enduring village and, for the first time, see historic Mi'kmaq ceramic pottery. Understand the significance and traditions presented from the Augustine Mound National Historic Site and the Oxbow National Historic Site. Time honoured traditions await you at Metepenagiag—where spirits live!

Visitors can enjoy the following:

- ◆ Overnight accommodation in the Aboriginal themed Metepenagiag Outdoor Adventure Lodge
- ◆ Traditional Mi'kmaq cuisine and other local fare in the dining room.
- ◆ Artefacts, interactive displays, multimedia theatre presentation, and exterior interpretive trail at the heritage centre.
- ◆ A guided interpretive hike in the Metepenagiag Nation's traditional territory, or canoe excursion on the river, with a Mi'kmaq guide.
- ◆ Viewing the archaeological finds of this enduring Aboriginal village, seeing historic a Mi'kmaq ceramic potter, and visiting the Mi'kmaq Boutique.

- a) How appealing is this particular aboriginal attraction to you?

- Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

- b) (IF EXTREMELY OR VERY APPEALING IN a) ASK) Which elements of that attraction do you find the most appealing, if any?
Anything else?

- c) How many days would you like to spend visiting this attraction?

_____ Days

No idea ☐

- 16) (ROTATE CONCEPTS) Here is another Canadian aboriginal cultural attraction that we would like to show you.

Wanuskewin Heritage Park



Source: www.wanuskewin.com



Wanuskewin Heritage Park is located 5 kilometres north of Saskatoon, on the edge of the prairie where the Opimihaw Creek flows into the South Saskatchewan River. The Park was designated a National Historic Site in 1986. It is located on 116 hectares and contains an award-winning Visitor Centre, which serves as the hub for numerous activities, educational programs, training and cultural events.

The Park was established as a living memorial to the Northern Plains People who have gathered on the site for over 6,000 years. There are nineteen sites that represent the Northern Plains Peoples: summer and winter campsites, bison kill sites, tipi rings, and a boulder alignment known as a medicine wheel, all found within one kilometre of each other. Native hosts guide visitors and organize a wide range of sporting and cultural events/activities that reflect the area's natural and cultural history. Visitors can enjoy the following experiences:

- ◆ Summer or winter tipi overnight stays with cultural interpretation and other activities such as cooking bannock over an open fire.
- ◆ Hike the "Path of the People" trail, which tells the story of the First Peoples living in the valley. Look for the Newo Asiniak and Opimihaw Buffalo Jumps, Juniper Flats Encampment, the Opimihaw Valley and the Anisk Rest Site.
- ◆ Hike the "Trail of the Buffalo" for a magnificent view of the river valley. Touch the buffalo rubbing stone, rubbed smooth by the thousands of buffalo who grazed here and drank from the creek below where the First Peoples camped.
- ◆ See dancers performing traditional dances such as the Fancy Bussle, Men's Fancy Dance, Jingle Dress Dance and many others.
- ◆ Sample traditional food offerings such as bannock, bison, Saskatoon berries, and muskeg tea in the Visitor Centre restaurant.
- ◆ Learn about traditional medicine and spirituality from Native elders.

- a) How appealing is this particular aboriginal attraction to you?

Extremely appealing ☐
Very appealing ☐
Fairly appealing ☐
Not very appealing ☐
Not at all appealing ☐

- b) (IF EXTREMELY OR VERY APPEALING IN a) ASK) Which elements of that attraction do you find the most appealing, if any?
Anything else?

- c) How many days would you like to spend visiting this attraction?

_____ Days
No idea ☐

- 17) Overall, on that trip to Canada, how long would that trip likely be and how many days of your vacation would you want to spend at aboriginal attractions, celebrations and experiences?

Total duration of next trip to Canada _____ days
(best guess)

Preferred number of days visiting _____ days (PN: MUST
any aboriginal attractions, BE LESS THAN TOTAL
celebrations, experiences DURATION)

- 18a) Prior to travelling to Canada, where do you or would you specifically look for information on Canadian aboriginal attractions if you wanted to know more about them? (CHECK AS MANY AS APPLY)

Internet ☐
Friends ☐
Magazines ☐
Tour operators ☐
Travel agents ☐
Other (specify) _____
No idea ☐

18b) (IF INTERNET IN Q. 18a) ASK) You mentioned the internet as a source. Which sites in particular did you or would you visit for information on aboriginal attractions, celebrations and experiences in Canada? (ROTATE ORDER OF FIRST 9 STATEMENTS) (CHECK AS MANY AS APPLY)

- Word/phrased search engine (e.g., Google, Yahoo, MSN) ☐
- Websites of national government tourist offices ☐
- Websites of provincial, regional or local government tourist offices ☐
- Websites of Canadian Aboriginal tourism organizations ☐
- General travel sites such as Expedia, Travelocity/lastminute.com, Priceline/Active/Bookings, ebookers/octopus ☐
- (In Germany: General travel sites such as L'TUR, HRS, Hotel.de, holidaycheck)
- (In France: General travel sites such as Voyages-SNCF (no rail), Go Voyages, PartirPasCher-Yoopi Travel)
- Traveller review site (e.g., tripadvisor.com) ☐
- Local travel agency online ☐
- Tour operators websites ☐
- Resort websites ☐
- Other private sector website ☐

Travel blogs (please specify which sites) ☐

Other sites (please specify which sites) ☐

19) Would you use a special website devoted exclusively to Canadian aboriginal attractions and experiences?

- Yes ☐
- No ☐

20) Where did you first learn about Canada's aboriginal people: (ROTATE ORDER) (CHECK AS MANY AS APPLY)

- In school ☐
- Storybooks ☐
- Which authors? (please specify) _____
- Past visitors to Canada ☐
- Other friends or relatives ☐
- Magazines ☐
- Television ☐
- Movies/ films ☐
- Newspapers ☐
- The internet ☐
- Some other source (please specify) _____
- DON'T RECALL ☐

- 21) Now one last question to help us profile travellers. Please indicate how well you agree or disagree with each of the following statements (DO NOT ROTATE STATEMENT ORDER)

	Totally Agree	Agree	Disagree	Totally Disagree
I like to be able to impress my friends with all of the 5 star hotels and resorts I have been to.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The part that makes me most uncomfortable about travelling is having to adjust to unfamiliar locations, foods, people, languages and a different way of doing things.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have everything I need at home; there's no reason to spend money to travel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I avoid taking uncomfortable rides such as packed local buses. If it means missing something we wanted to visit, so be it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I find it enriching to be exposed to others engaging in their customs, routines and rituals in their own environment – to me, that is the authentic travel experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I live for travel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel safer if a tour operator has organized the hotel, the restaurants to eat at and the sites to visit.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am much more indulgent and carefree while on vacation than I am at home.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I'm more interested in understanding how my ancestors lived than in experiencing the culture as it exists now.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I prefer to visit places where I will be awestruck by the sheer beauty of nature, the land, mountains, seas and wildlife.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You can't find real culture here at home; you have to travel abroad to find it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't need to see all the recommended tourist sites to feel as if I've really visited a place; in fact the best way to know a place is just to walk around and do everyday things like eating, shopping, socializing and relaxing, just as the locals would do.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I prefer to relax at home surrounded by my own things rather than to go out and travel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A family vacation is an important time to make family memories.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wherever I go, I have to have the very best there is to offer: the best hotels, the best restaurants, the best shopping and the best service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Totally Agree	Agree	Disagree	Totally Disagree
I want to come back from vacation feeling relaxed and refreshed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When I'm on vacation, I just do whatever I want, however I want and have a good time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The worst way to travel is a trip where everything has already been decided for you in advance, such as on an organized tour.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I just want to relax and not have to deal with any worries or obligations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I like to be able to take my time at a historic site or in a museum and not feel rushed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I want to get away from it all.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I like to experience local foods, local locations, to see local architecture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel more comfortable travelling with other people or a guide.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't want to eat food that isn't like the food I eat at home.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I like to travel in ways that allow me to talk to other travellers about what they are seeing and doing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for your time!

Focus Group Discussion Guide



Aboriginal Tourism Discussion Guide

1. Background and Introduction (10 min)

In this section we will be warming up the participants, letting them get to know each other and learn about any specific hobbies, interests or clubs they belong to. It is important to understand their "spare time" activities and interests so that we can get some learning for potential "niche" travel packages.

- Please refer to the introductory sheet attached.
- Explain room set-up, confidentiality, explain expressing their own opinions, explain roles and objectives.
- Establish respondents as authorities.

Background on Respondents

- Have participants introduce themselves.
 - Name.
 - Type of work, if they work outside of the home.
 - Hobbies and interests or clubs that you belong to (for example: education, cooking, skiing, general outdoor activities, gardening, art, etc.).
 - Do you pick travel destinations based on any of your interests?
 - If so, what have you done, where have you gone?

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2. General Interest in Travel (5 min)

- Let's talk about vacation travel in general.
 - What types of vacations do you like to take, or what destinations do you like to go to?
 - Can we group these vacations into any kind of categories?
 - Which groupings are the most frequently taken and which less? Why?

3. Interest in Aboriginal Travel (5 min)

- I would now like to talk about aboriginal travel. What are your thoughts on it? What comes to Mind?

[Gather a full range of thoughts and list on board]

- What countries do you associate with aboriginal travel?
 - List countries **[Note, make sure the following get on the list: Australia, New Zealand, Africa, U.S., Canada]**
 - For each Country—review the names they most commonly use to refer to aboriginals.
 - For each country—review what they would like to see and experience with aboriginal travel.
 - For each country—review the sources for these images and experiences.

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4. **In Depth Review on Canadian Aboriginal Travel** (30 min)

- I would now like to focus specifically on Canada.
 - Why does aboriginal travel interest you? Let's go into more detail.
 - Go back to notes on easel on Canada and gather more depth on images, activities, and experiences.
 - How do you want to feel?
 - What do you hope to get?
 - Where did your interest come from?
 - Has your interest been increasing or decreasing over the past while?
 - What is the cause? What are the triggers **[explore personal life, age, time, information sources, etc]**
 - Take me through the trips you would take to Canada. How would it unfold? Please include aboriginal travel in this trip. **[Give participants paper and pens, also encourage them to do the best they can with the little information they have]** Go over the trips together.
 - How they managed to include aboriginal travel
 - How did they make it happen
 - Information sources (if the Internet)
 - Who they would go to
 - Is the aboriginal travel in the beginning, middle, or end of the trip? Why is it there? Or is it the whole trip? Why the whole trip?
 - Determine in the planning process what they felt is or would likely be the weakest link.
 - Go over what their expectations would be like.
 - Paint me a vivid picture of what you expect
 - What would you see, do, for how long?
 - What would be the high points (the best part)?
 - What are the concerns? The potential low points?

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5. **Review of Aboriginal Images** (30 min)

- I have several pictures and images I would like you to sort into groupings. I am not going to tell you the groupings I would like you to sort them into. Instead, I would like you to work as a team and group them in relationship to an aboriginal trip. Once you have sorted the pictures into groupings, give each of these groupings a nickname.
- Review Groupings **[REPEAT THE FOLLOWING FOR EACH GROUP]**
 - Why did you choose that nick name?
 - What is common with these pictures?
 - What does the grouping offer?
 - How would you benefit or not?
 - How attractive or appealing is this grouping?
 - What kind of a trip would this grouping be?
 - How would you integrate it into a trip to Canada?

6. Review of Specific Attractions (30 min)

- I have several attractions I would like to go over with you. I would like to sort them into three groupings.
 - Highly desirable
 - Somewhat desirable
 - Not at all desirable
- Review the attractions from each grouping to understand their level of appeal or rejection and why.
 - Why is it in this grouping?
 - How do you imagine it?
 - What would you personally get out of it?
- Are there any ideas or pictures from the previous sort that could complete or make this attraction better?
 - Review pictures and why.

7. Summary (10 min)

- Can aboriginal travel be a key part of a trip to Canada? If so why and how? If not, why not?
- Can aboriginal travel be a main driver to taking a trip to Canada? If so, why and how? If not, why not?
- Is this a key selling proposition for Canada or a minor add on?
- What do you think is the best way for Canada to propose aboriginal travel to people like yourselves?

Trade Interview Guide

Canadian Tourism Commission – Aboriginal Tourism Market Study

Aboriginal Tourism Travel Trade Interview Guide

Tour Operator / Agency: Interviewee (name/title): Date:

Markets Involved with: U.K. ____ France ____ Germany ____

A. BACKGROUND ON TOUR OPERATOR / TRAVEL AGENCY

1. What is your involvement with the Canadian travel market?
2. What types of products do you sell to Canada? Range? Specialties?
3. Which regions are included in your itineraries?

B. GENERAL QUESTIONS ON ABORIGINAL TOURISM

4. Thinking globally, which countries are most popular for Aboriginal cultural tourism experiences? Why?
5. What terminology is common in your market to refer to Aboriginal tourism? Does it depend on which destination country? What terms are used for Canada, Australia, etc?
6. What kinds of Aboriginal experiences are travelers looking for?
7. Do people ever travel to those destinations solely for the purpose of Aboriginal experiences or are Aboriginal experiences usually only part of a broader itinerary?
8. What other activities do those interested in Aboriginal tourism tend to get involved with? Are they outdoor related? Other focuses?

CTC Travel Trade Discussion Guide

Page 2

C. CANADA'S ABORIGINAL TOURISM EXPERIENCES

9. What does Canada have to offer in terms of Aboriginal experiences, if anything?
10. Do they measure up to those of other countries—e.g. Maoris in New Zealand, Aborigines in Australia?
11. Is the image of Canada's Aborigines generally positive or negative overseas as it relates to Aboriginal tourism products and doing business with them (business relationship)?
12. In what way is it positive?
13. In what way is it negative?
14. What are their pre-conceived ideas of Aborigines in Canada? (e.g. Hollywood images? Positive or negative?)
15. Where do these impressions come from?

D. MARKETING AND PACKAGING CANADA'S ABORIGINAL TOURISM PRODUCTS

16. How should Aborigines and Aboriginal cultural tourism experiences be portrayed to appeal to the UK/France/German market?
17. Are Aboriginal products included in many current packages? Which ones?
18. Why not more often?
19. Is it a growth market for Canada? Why? Why not?

20. What are the barriers to growth?

21. What can the stakeholders in the Canadian Aboriginal tourism sector do to make it grow?

22. How should Canada's Aboriginal attractions be positioned in terms of advertising and promotion? How should they be portrayed?

23. What media would be most effective to target prospects? (Probe for targeting opportunities like specific websites, special magazines, associations, etc)

24. How can the CTC or any other agencies in Canada help you? Help the sector grow?

25. What type of help:

- a. Awareness building?
- b. Marketing?
- c. Product development?
- d. Other?

E. MARKET CHARACTERISTICS

26. Is the traveler interested in Aboriginal tourism a niche market or broadly based?

27. Given your client base, what are the typical profiles of your customers interested in Aboriginal cultural experiences (in Canada and competitive Aboriginal destinations)?

Thank you for your time!

Trade Interview List: Inbound Receptive Operators

United Kingdom Market:

- Canadvac Travel Services – Franziska Fenselau, Managing Director
- Cantrav Services Inc. – Suzanne Westover, Director of Marketing
- Discover Holidays Inc. – Sabine Stauf, Sales Executive for Groups
- JAC Travel – Rose Epp
- Vision - The Atlantic Canada Company – Maria Matthews, Owner

German Market:

- Canadian Tours International – Samantha Moreno, Tour Co-ordinator
- Canadian Travel Partners – Ramona Scheiding, Manager
- Creative Western Adventures Ltd. – Suzanne Eugster, Owner
- Hanseatic Calgary Travel Inc. – Marianne Jost, Owner
- Jonview – Roman Duhatsky, Product Manager

French Market:

- Globe-Trotter Tours Canada – Marc-Andre Plouffe, General Manager
- Heartland International Travel & Tours DMC – Heather Pedreira, Incoming Travel Coordinator
- Misa Tours – Andree Boisvert
- O Tours Inc. – Michelle Gervais, President
- Receptour Canada – Enrico Fuoco, Vice President - Product Development

Trade Interview List: Overseas In-Market Tour Operators

United Kingdom Market:

- Thomas Cook Tours – Katharine Farahat, General Manager
- The Independent Traveller – Malcolm Peasnall, Director
- Travel Pack – Peter Allen, Product Director
- Travelsphere Holidays – Louise Heatley
- Titan Connections – Juliette Darlington, Product Manager

German Market:

- Canada Direkt – Matthias Hausknecht, Managing Director
- Canusa Touristik GmbH & Co. – Kolya Kassner, Asst. to President
- Indianer Reisen – Bertram Posner, Owner
- Meier's Weltreisen – Maren Steurnagel, Director
- Tour Consult – Andreas Fraissl, General Manager

French Market:

- Comptoir Canada – Isabelle Weber, Director, Destination Services
- Groupe Terre Canada – Rene Poitras, Manager
- Jetset Voyages Equinoxiales – Charles Julien, Asst to Product Manager
- Le Cercle Des Vacances Canada – Julie Labrecque, Sales Manager
- Voyageurs Du Monde – Jean-Marie Douau, Director for Canada & USA

Trade Interview List: Overseas In-Market Travel Agents

United Kingdom Market:

- Can-Am Travel – Myrna Cooper, Travel agent
- Garstang Travel – Claire Donnelly, Office Manager
- Hallmark Travel – Joanna Bradley, Travel Agent
- Langley Travel – Pat Waterton, Travel Agent
- Robert Webb Travel – Robert Webb, Managing Director

German Market:

- Canadianlive – Marko Broekmann, Owner
- Wikinger Reise Center – Martin Wippermann, Owner
- Haase-Reisen GmbH – Christian Haase
- Trans Canada Touristik – Andrea Budde
- Lets-Fly Reiseladen – Peter Kruger

French Market:

- Azur Destinations – Marie Françoise Barthelemy, Managing Director
- Nouvelles Frontières St. Quentin – Edith Barta, Director
- Club Voyages Aventure – Patricia Muller, Director
- Appel Aux Voyages – Solenn Dordet, Agent
- Pause Voyage – Frédérique-Michèle Batedou, Travel Counsellor