

The Aboriginal Tourism Market

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The Market Question

Thinking of starting an Aboriginal tourism business? Wondering who is interested in Aboriginal tourism? This fact sheet is designed to synthesise results of market research on Aboriginal tourism by various tourism organizations over the last few years. It is meant to provide interested outsiders, entrepreneurs as well as existing businesses with a picture of the current and future Aboriginal tourism market.

While on vacation, many tourists seek to gain an understanding of a foreign people's origin, history and culture. Tourism increases cross-cultural understanding and is a tool of economic diversification and development. Over the last decade, there has been an increasing interest by communities across North America in sharing and revealing their culture to those who do not yet know much about it. At the same time, reports produced by tourism organizations such as the Canadian Tourism Commission (CTC), Aboriginal Tourism Canada (ATTC) and the Australian Tourist Commission continue to document a growing demand and interest by tourist markets for Aboriginal cultural tourism. So, who are the tourists interested in Aboriginal tourism?



Metlakatla First Nation guide at Pike Island, Prince Rupert, B.C.

Key Market Findings

- Aboriginal tourism in Canada today is a \$750 million industry
- A substantial growth rate is expected by industry experts
- Numerous market segments related to cultural travel and tourism offer great opportunities
- "Dual track" travelers in the Canadian and U.S. with interest in a mix of nature and culture experiences market offer a particular opportunity for a product mix of nature and culture tourism
- European travelers from select markets exhibit strong interest and motivations to experience Aboriginal tourism
- Affluent and higher educated travelers are a prime target market



K'san Historical Village and Museum, Hazelton, B.C.

The Aboriginal Tourism Traveler

Aboriginal tourism interested travelers tend to be:

- older, affluent and higher educated
- interested in nature and 'authentic' experiences
- participate in "soft" outdoor recreation activities such as hiking / backpacking, wildlife viewing, canoeing, kayaking, etc.
- likely to participate in other cultural activities on their trips (e.g. going to local fairs and festivals)



Canadian Cultural Travelers

The majority of Canadian travelers who participate in Aboriginal-related vacation activities are mature and higher-educated travelers. During their vacations these travelers like to experience a variety of cultural experiences including attending museums, galleries, festivals, fairs, live performances, plays and the like. Most popular are also soft outdoor activities such as wildlife viewing, whale watching, hiking or backpacking in wilderness settings. Other activities that are highly attractive to this market are fishing, canoeing and kayaking. Aboriginal tourism products such as interpretive tours about the traditional use of the natural environment can be offered together with these outdoor activities. As a result of their interest in the outdoors, Canadian culture travelers are also a target market for backcountry and wilderness type operations such as lakeside resorts and mountain lodge.

Canada's North

Canada's north attracts many visitors to its natural beauty, culture and pristine environments. In a tourism market study of 2001, it was found that visitors who are particularly attracted to the outdoors are more likely to travel to Canada's north. There were 3.6 million outdoor visitors in Canada in 1999 and 1.1 of these were considered "high yield" travelers – or travelers who prefer to stay in

roofed accommodation. Of these 1.1 million, an estimated 314,000 traveled to Canada's northwest. This market is of particular interest to tourism establishments in the north as the outdoor visitor segment spent approximately \$12 billion in the communities visited and about \$6.5 billion of this pool was spend by the high yield travelers in this

Canadian Aboriginal Culture Travelers tend to:

- Be mature, higher educated
- Be between 45-64 years of age
- Stay overnight with friends and family
- Have a strong interest in wilderness & being active in the outdoors
- Participate in various cultural activities during their travels (e.g. sightseeing, museums, galleries, local festivals)

segment. These travelers are also most motivated to travel to remote locations and are willing to spend their budget on overnight accommodations as well as outdoor-related activities. Approximately 10% of those who are in the high yield outdoor segment travel to northern parts of Canada.



The U.S. Traveler

The U.S. market is Canada's primary international tourist market. Interest in Aboriginal tourism appears highest in the South Atlantic regions (Florida, Georgia, North Carolina, South Carolina) and Mountain regions (New Mexico, Arizona, Colorado, Nevada, Idaho, Wyoming, Montana). According to market research, about 10% of U.S. visitors took part in Aboriginal-related experiences during their travel within the past two years. At the same time, there are about 13% of U.S. urban travelers who express above average interest in Aboriginal tourism experiences and who may be targeted for attractions in urban settings.



Culture travelers exploring the forest environment by Fort St. James, B.C.

American Aboriginal Culture Travelers tend to:

- participate in various cultural activities during their travels including museums, galleries, local fairs and festivals, etc.
- be mature and/or senior, well-educated and affluent
- be interested in historic sites, natural wonders, wildlife, sight-seeing, and participation in outdoor activities such as hiking, fishing, canoeing and kayaking
- be slightly more likely to be female than male

The Dual Track Tourist

One market segment within the North American market which has significant potential is the "Dual Track" niche market—travelers interested in a mix of nature and culture tourism interested travelers. According to market research, this niche market exists in Canada and the U.S. and consists of travelers who recently undertook an overnight trip and participated in Aboriginal tourism related tourism activities during that trip (e.g. a visit to an Aboriginal museum or interpretive center or a Pow Wow). Members of this market appear to have a greater interest than other travelers in:

- seeing natural wonders,
- historical sites and important places in history,
- unspoiled nature

A Description of Dual Trackers

Cultural Activities - Dual Track travelers are:

- more active than other travelers
- much more likely to have been to Aboriginal cultural events and activities in the past and,
- twice as likely to have engaged in other cultural activities (museums, art galleries, concerts, etc.)

Demographics

- Canadians in the Dual Track market are almost identical to the general traveling public in Canada with respect to gender, age and income distributions
- Canadians in this group tend to be less concentrated at the upper end of the income spectrum (12%) than their American counterparts (22%)
- they tend to live in households with no children (71%)
- 34% tend to take vacations on their own or with a partner/spouse but no children (63%)



ORTM students exploring culture and nature during field trip west of Prince George, B.C.

Outdoor Activities - Dual Track Travelers are:

- very interested in "soft" outdoor activities
- twice as likely to want to see wildlife, birds, and wildflowers/flora
- interested in "hard" outdoor activities that could be combined with Aboriginal tourism product, such as hiking/backpacking in wilderness settings, fresh-water fishing, canoeing and kayaking and whale watching, and
- 40% of Dual Trackers have been to a lakeside resort and about one third have camped in a wilderness environment

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