

# Aboriginal Cultural Tourism BLUEPRINT STRATEGY for BC Executive Summary

November 2005



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**ABORIGINAL**  
Tourism Association  
British Columbia

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# Aboriginal Cultural Tourism Blueprint Strategy for British Columbia

FINAL Report

November 2005

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## **The Blueprint Vision:**

The Aboriginal Tourism Association of BC (ATBC) was established in 1996 by a core group of Aboriginal volunteers involved in the tourism sector to share information, network and explore means by which they could strengthen the Aboriginal Tourism industry. Today ATBC is a formal Society with a vision to spearhead the development of a healthy, prosperous dynamic Aboriginal Cultural tourism industry.

It was with this vision in mind that ATBC recognized in early 2003 that the Aboriginal Cultural tourism industry was falling short of achieving its potential. The industry faced little support for its development, had only a small number of Aboriginal market ready companies which were struggling to stay alive, little market profile in one of the fastest growing sectors of the provincial economy, fragmented development at the Aboriginal, Provincial and Federal level and no clear plan of action. ATBC assembled a team of Stakeholders that included the Province of BC, the Federal government (through Indian and Northern Affairs Canada and Aboriginal Business Canada) and Tourism BC (TBC) to develop a plan of action to tackle these and many other concerns with the goal of developing a comprehensive “Blueprint” for Aboriginal cultural tourism development over the short medium and long-term.

Not all Aboriginal tourism businesses are necessarily focused on providing Aboriginal cultural experiences. For example an Aboriginal owned hotel, restaurant, or shop that does not incorporate a cultural element into its operations would not meet the needs of travellers seeking cultural experiences. While, these businesses are an important element of overall Aboriginal involvement in tourism, they would not be marketed under a ‘cultural’ brand. Nor are these businesses a focus for the BC Aboriginal Cultural Tourism Blueprint Strategy.

The framework for the development of the Blueprint provided for a comprehensive plan that included the following components:

- 1) Literature Review - A complete review, analysis and summary of the existing literature on the nature and scope of the industry.
- 2) Competitive Analysis - A review of other jurisdictions that have developed aboriginal tourism products - what they offer, how the product was developed and how they currently market their destination.
- 3) Review of Existing Consumer Research - Review of current consumer research and global trends of Aboriginal Cultural Tourism (e.g. Travel Activities and Motivations Survey (TAMS), Canadian Tourism Commission (CTC) Europe surveys, US, Australia research).
- 4) Definition of Aboriginal Cultural Tourism - ATBC finalization of the definition of Aboriginal Cultural Tourism.
- 5) Industry Surveys - Surveys of current aboriginal cultural tourism operators – both market ready and in development.
- 6) Consumer Surveys - On-site and mail back intercept surveys of consumers at key Aboriginal attractions and Visitor Information Centres.

- 7) Product Market Match - Analysis matching current and potential Aboriginal products with consumer interest, preferences and market size.
- 8) Aboriginal Community Input Forums - Six Aboriginal community input sessions were held through BC soliciting input for the Blueprint Strategy.
- 9) Online Aboriginal Community Input Questionnaires - ATBC provided web enabled feedback questionnaires and direct email access for community input into the strategy.
- 10) BC Aboriginal Cultural Tourism Strategic “Blueprint” Plan- Development of a short, medium and long term strategic plan outlining the critical path for developing a successful Aboriginal Cultural tourism industry in BC.

A consulting team consisting of O’Neil Marketing (Beverley O’Neil), Small Planet Consulting (Judy Karwacki), Dr. Peter Williams, DM Russell Consulting (David Russell), and Blue Ice Consulting (Cathy Holler) was the successful bidder for all consulting components of the project and was guided by a steering committee selected by ATBC to provide advice throughout the project development.

The “Blueprint” project design and approach is unique to date in Canada in that it combines comprehensive info-gathering sessions with Aboriginal operators, interviews with consumers, the travel trade and international tour operators as well as secondary research. The fundamental premise underlying development of the plan was that it should be “market-driven” and not “product-driven”. A “market driven” plan ensures development of an industry focused on providing products that both consumers want and First Nations are willing to supply. This was achieved by conducting a “product-market” match with the consumer and industry data collected.

## **The Findings in Support of the “Blueprint”:**

### **Research Outcomes:**

Market research reveals that the Aboriginal cultural tourism industry has considerable potential for growth in British Columbia. Of approximately 180 Aboriginal business operations that are operating as part of the tourism sector, just over half fall within the Aboriginal cultural tourism sector as defined by ATBC. ATBC has just under 40 members that meet the ATBC market ready criteria with a further 50 that are in various stages of development. The majority of these 90 businesses are located on Vancouver Island and in Northern BC tourism region.

The opportunity for the Aboriginal cultural tourism sector to play a significant role in providing Aboriginal entrepreneurship and employment, tourism training and mentoring, capacity building, cultural sharing, training and awareness and an array of other benefits that support a self sustaining economy is hindered by the challenges facing the industry. While provincial market demand for tourism is robust, the Aboriginal cultural tourism industry faces significant development challenges, including the limited awareness of tourism potential and its benefits for First Nation communities and cultures, limited capacity to develop tourism within First Nation communities and the reality that the national and international marketplace knows very little about Aboriginal cultural tourism products. ATBC was created to address these limitations however it was recognized that a “Blueprint” plan of action was needed in order to move the industry forward.

Comparative research reveals that BC is not alone in its interest and desire to support the growth of the Aboriginal tourism industry. Limited industry coordination, extensive fragmentation and product development issues also impede growth of Aboriginal tourism destinations worldwide. Yet in some of these destinations (e.g., New Zealand), more progress has been made in defining cultural tourism experiences and establishing successful product certification mechanisms. However, the successes in product development have not been matched by efforts to create effective marketing channels. This

has served to compromise the impact of investments made in product development assistance ranging from training to business planning support and provides a “lesson learned” for BC.

Current Aboriginal tourism product in BC consists of adventure tourism products (31%), products associated with information centres and arts/crafts retail stores (20%) and various other Aboriginal tourism product including accommodation and transportation. Aboriginal tourism operators reported that their future expansion and development plans would concentrate on products and services related to adventure tourism (38%), attractions (24%) and accommodation (23%). These operators as well as other Aboriginal tourism stakeholders, including First Nation communities, were generally supportive in wanting to showcase Aboriginal culture.

The development challenges facing the Aboriginal Cultural tourism industry are significant and include such things as the need for community approval processes, a lack of community awareness of tourism, restricted access to land and other resources, inadequate physical infrastructure support, gaps in human resource skills development, and lack of access to appropriate marketing mechanisms.

### **Market Perspectives Toward Aboriginal Cultural Tourism:**

To estimate the potential of Aboriginal Cultural Tourism in BC for packaged travel, interviews were conducted with thirty-four (34) travel trade representatives representing over 50,000 travellers from Canada, the United States, Great Britain, Germany, Switzerland, Australia, New Zealand, Japan and Mexico. These operators reported growing interest in authentic cultural experiences, interactive and hands-on “live it, instead of watch it” experiences, and high quality guided interpretation of local cultures and communities with package durations that can easily fit into existing packages. Eighty-nine percent (89%) of these representatives indicated they would consider offering or expanding Aboriginal experiences in Canada and ninety-four (94%) said that they would offer more than one tourism experience. These results indicated a clear desire by the Travel Trade to promote Aboriginal Cultural Tourism product in BC.

On the other hand, collectively, they expressed a concern about the capacity of Aboriginal cultural tourism suppliers to develop professional relationships and consistently deliver high quality products and services. In addition, they were concerned about the ability and willingness of suppliers to adjust programs, particularly the duration of programs, to meet the needs of the travel trade. Tour operators also indicated limited awareness of what Aboriginal cultural tourism is, what market ready products are already available, and how they could engage Aboriginal cultural tourism in order to deliver business.

In addition to the travel trade, research was conducted through on-site interviews and mail back surveys with independent travellers at selected Aboriginal Attractions and Visitor Information centres throughout BC. The findings of this research was similar to that of the travel trade, citing many issues and constraints but a desire to know more about the availability, access to, and quality of, Aboriginal cultural tourism product. Taking into account the Travel Trade’s perspectives as well as interviews with independent travellers and secondary market research, six distinct but complementary Aboriginal cultural tourism sectors were identified for BC with the priorities being Aboriginal Cuisine, Heritage, Events and Festivals, and Arts/Handicrafts. Product segments that were identified as having less potential impact included Outdoor/Adventure and Sports.

### **Emerging Tourism Market Trends:**

All of the tour operators interviewed agreed that new travel trends were reshaping their products. These trends included such things as: vacations becoming shorter with weekend getaways growing in popularity; cultural experiences growing in demand; authentic interpretation of local attractions and products increasing in importance; growing interest in experiential tourism; and high quality guided interpretation of local cultures and communities being sought. These changes in travel preferences

have created increased market interest in Aboriginal Cultural experiences which could be most effectively tapped into if the **cultural element provides an enhancement to the experience** rather than be the primary focus, in order to cater to a larger audience. It is important for the growth of Aboriginal cultural tourism to recognize that, while some travelers are primarily interested in Aboriginal culture, a much larger market can be captured by enhancing mainstream tourism experiences with an Aboriginal cultural element.

### **Results of Aboriginal Community Consultations:**

A series of Aboriginal community consultation meetings and interviews with Aboriginal Tourism operators revealed that many issues and constraints to Aboriginal Cultural Tourism development were common across stakeholder groups. Over 20 major constraints and issues were identified, all of which have been addressed in the “Blueprint”. These challenges included such things as: community readiness issues; Aboriginal leadership not understanding or interested in the tourism industry; human resource development; training; access to markets and industry development.

### **The “Blueprint” Strategy:**

The market research, competitive destination analysis and interviews with Aboriginal tourism operators confirm a strategic approach that has several important characteristics:

- it must be market-driven;
- an Aboriginal Cultural tourism product must attain market ready status and operate according to the rules of engagement for the travel trade and independent travellers;
- it must be respectful and responsive to the protocol of First Nations and their cultures;
- it must incorporate an effective marketing mechanism that provides the necessary business incentive to foster investment in Aboriginal Cultural tourism product;
- it should not operate independent of the mainstream tourism industry, but where possible partner and build upon existing programs; and
- It should not reinvent the wheel but instead take advantage of the existing array of programs for product development and business support.

Accordingly, the vision for the Aboriginal Cultural tourism industry is one that is vibrant and sustainable. Achieving this vision in the context of market realities and product development requirements is the challenge for the strategy. Pursuant to this vision, the goals for the blueprint strategy are to:

1. provide a mechanism for Aboriginal communities, individuals and businesses to successfully establish and sustain tourism businesses;
2. enhance awareness of the potential of Aboriginal cultural tourism opportunities within all First Nations communities in BC;
3. establish mechanisms for practical program support of existing Aboriginal cultural tourism businesses that are responsive to their needs and that facilitate achieving market ready status;
4. develop a practical cultural protection process and information tools that can be used by individual communities to establish their own protocols for tourism within their communities and the sharing of their cultures;
5. design an Aboriginal cultural tourism product brand encompassing cultural protection and market-driven tourism standards;

6. create a word mark program that raises awareness of BC Aboriginal cultural tourism and is useable by the industry;
7. increase the number of Aboriginal people in management and tourism careers; and
8. increase the number of market ready Aboriginal cultural tourism products.

It encompasses several components as illustrated in **Exhibit 1.1**, including:

1. *Cultural protection protocols* – comprising approval practices that respect First Nation cultures, languages and heritage values stemming from ATBC’s definition of Aboriginal cultural tourism and authenticity. The intent is to provide “how to”, cultural product development guidelines and protocol guidelines with respect to cultural protection.
2. *Branding* – Destination branding is oriented primarily to enhancing the appeal and market awareness of a destination in targeted marketplaces. An example of destination branding is BC’s “*Super, Natural British Columbia*®” designation managed and owned by TBC. For the Aboriginal cultural tourism industry, a complimentary brand could be effectively incorporated into future marketing campaigns. At the product level, the product-branding program will ensure Aboriginal cultural tourism products are certified, authentic and market ready.
3. *Product development and marketing* – tailored to three developmental stages for Aboriginal cultural tourism product:
  - **Tier 1 - Start-up product stage** –where Aboriginal cultural tourism businesses, potential start-ups and product are undeveloped but have an interest in exploring cultural tourism as an economic development activity. Activities under this tier are those that encourage communities and entrepreneurs with an interest in cultural tourism to develop product and help them understand tourism’s working environment;
  - **Tier 2 - Existing but not market ready product** – where Aboriginal businesses are operating but do not have market ready products and there are clear gaps in terms of market ready industry standards, hospitality, service levels and other shortfalls; and
  - **Tier 3 - Market ready** –where tourism products that satisfy market ready standards, should be fully integrated into local, regional and provincial destination marketing programs.

For each of the three tiers, the strategy outlines a multi-dimensional series of programs that have been recommended in order to spur growth of the Aboriginal cultural tourism industry and to facilitate coordination between federal and provincial agencies with responsibilities in this area. **Exhibit 1.2** provides a schematic outlining the Organizational Implementation Chart, whereas **Exhibit 1.3** provides a visual presentation of the core activities for implementation starting at the core or center of the circle.

## Strategy Components:

The Blueprint Strategy consists of three components which are required to put the foundation in place for expanding Aboriginal cultural tourism. These are intended to fill existing gaps in marketing infrastructure, address challenges identified through Phase 1 and 2 research and other discussions, and develop tourism product and community assistance programs in partnership with other agencies. The components are listed below and each is described in the following sections.

**1. Program Development** – Undertake program development in collaboration with First Nations and appropriate federal, provincial, Non-Government Organizations (NGOs) and private sector partners to implement the necessary assistance to develop Aboriginal cultural tourism. Specifically, programs are recommended to support:

Product Development including:

- Cultural protection protocols, and
- Industry standards (market driven same as mainstream tourism industry)

Branding including:

- Product branding,
- Destination branding

Industry Development including:

- Community Tourism Development (awareness, planning, training and physical infrastructure),
- Labour and Human Resource Development (for businesses and individuals not yet in industry, entering the industry and in the industry),
- Support Programs (community, business development, training and marketing),
- Communications Development (workshops, newsletters and web resources)

An array of programs for each of the developmental stages (or tiers) for the Aboriginal cultural tourism product will be established. These are illustrated in the following table.

| Start-up products (undeveloped)  | Existing, but not market ready products   | Market ready products   |
|--|---|---|
| <ul style="list-style-type: none"> <li>• New product development programs including coaching, business planning and financial facilitation</li> <li>• Community awareness</li> <li>• Community development</li> <li>• Mentoring</li> <li>• Financing</li> <li>• Web resources</li> </ul> | <ul style="list-style-type: none"> <li>• Facilitation of operators to access existing programs</li> <li>• Providing appropriate training, business planning, market management and operations support</li> <li>• Financial programs</li> <li>• Mentoring services</li> <li>• Web resources</li> </ul> | <ul style="list-style-type: none"> <li>• Integrated with TBC, regional tourism associations, Canadian Tourism Commission, Vancouver Organizing Committee for the 2010 Winter Games</li> <li>• Branding/positioning consistently applied by above partners</li> <li>• Cultural protection mechanisms in place</li> <li>• Facilitating marketing</li> <li>• Branding</li> </ul> |

**2. Mobilizing for the 2010 Olympic and Paralympic Winter Games** – Establish the infrastructure and mobilization procedures to pursue opportunities associated with the 2010 Olympic and Paralympic Winter Games. This initiative is particularly focused on ensuring that the opportunity will advance the Blueprint Strategy overall vision and objectives, with the products and the Sea-to-Sky corridor serving as “benchmarks” and examples of the richness of the Aboriginal cultural tourism products throughout BC. As part of this initiative, lessons learned from the 2008 North American Indigenous Games will be incorporated into the strategy for the 2010 Winter Games.

**3. A Marketing Strategy** – The strategy is premised on an integrated marketing program for Aboriginal market ready product. There are existing Aboriginal cultural tourism products that meet ATBC's market ready standards. The marketing action plan is designed to put the necessary marketing infrastructure in place; to generate immediate benefits for the Tier 3 market ready products, setting a strong course for future business success and ensuring successful role models to inspire entry of new businesses.

## **Organizing for Implementation:**

ATBC has been the impetus behind the development of the “Blueprint” strategy in the belief that Aboriginal Cultural Tourism is a sector that is important to the growth of tourism in BC. ATBC has passed a resolution that, with the completion of the “Blueprint” strategy, three members of its executive form the nucleus of the implementation Advisory Committee and develop the balance of the Advisory Committee with Aboriginal, Federal and Provincial participation as part of the implementation team partnership.

Effective implementation of the strategy requires a commitment of at least five years by the key organizations and agencies that are mandated to develop tourism, First Nations communities and Aboriginal economic development organizations. Strategic activities should begin immediately in order to capitalize on the potential synergies created by development and marketing activities associated with preparations for the 2010 Winter Olympics and Paralympics. The strategy recommends the creation of an Implementation Advisory Committee to provide overall guidance and promote the strategy. Although ATBC has yet to establish the Advisory Committee, it will likely include representatives from Federal Government departments and agencies including Western Economic Diversification, Aboriginal Business Canada and Indian and Northern Affairs Canada, the Provincial Government and Tourism BC, as well as Aboriginal representation by individuals who are widely respected in the Aboriginal Community at large and by the government agencies. The implementation program will be the responsibility of the Implementation Advisory Committee (IAC). The mandate of the IAC would be to: work with participating agencies to assist in program delivery; give direction to implementation partners as required; and monitor the “Blueprint” strategy implementation progress.

## **The Benefits of the “Blueprint” Strategy:**

Implementation of the “Blueprint” strategy will grow the Aboriginal cultural tourism sector by enhancing the viability of existing operations, removing barriers to development, providing resources, and creating new opportunities for First Nations communities and entrepreneurs.

A strong and healthy Aboriginal tourism industry will produce benefits for more than Aboriginal cultural tourism operators and First Nation communities. Significant benefits will accrue to the mainstream tourism industry and stakeholders and agencies involved in supporting, promoting and expanding the industry. These benefits include the following:

- A higher skilled and better-qualified Aboriginal labour force for tourism employment;
- more employment and career opportunities for Aboriginal people;
- greater recognition of the richness and diversity of the First Nation cultures and languages in British Columbia;
- more quality, market-ready, culturally appropriate Aboriginal tourism products to complement existing BC tourism products and travel trade packages;
- more contributors to tourism program development;
- a more diversified and stronger British Columbia tourism industry;
- a richer cultural program to the 2010 Winter Games; and,
- a model for other provinces to support the development of the Aboriginal Cultural Tourism industry.

By identifying clear standards for achieving market ready Aboriginal tourism product status and establishing a clear developmental path for participating in Tourism BC's marketing programs, the industry will be more firmly positioned in the worldwide indigenous and mainstream tourism industries for success. Furthermore, supporting agencies will be better prepared to coordinate and distribute the resources available for Aboriginal cultural tourism in a more effective fashion, thereby supporting and strengthening all of BC and Canada's tourism industry.

Exhibit 1.1: Overview – Aboriginal Cultural Tourism Blueprint Strategy for BC

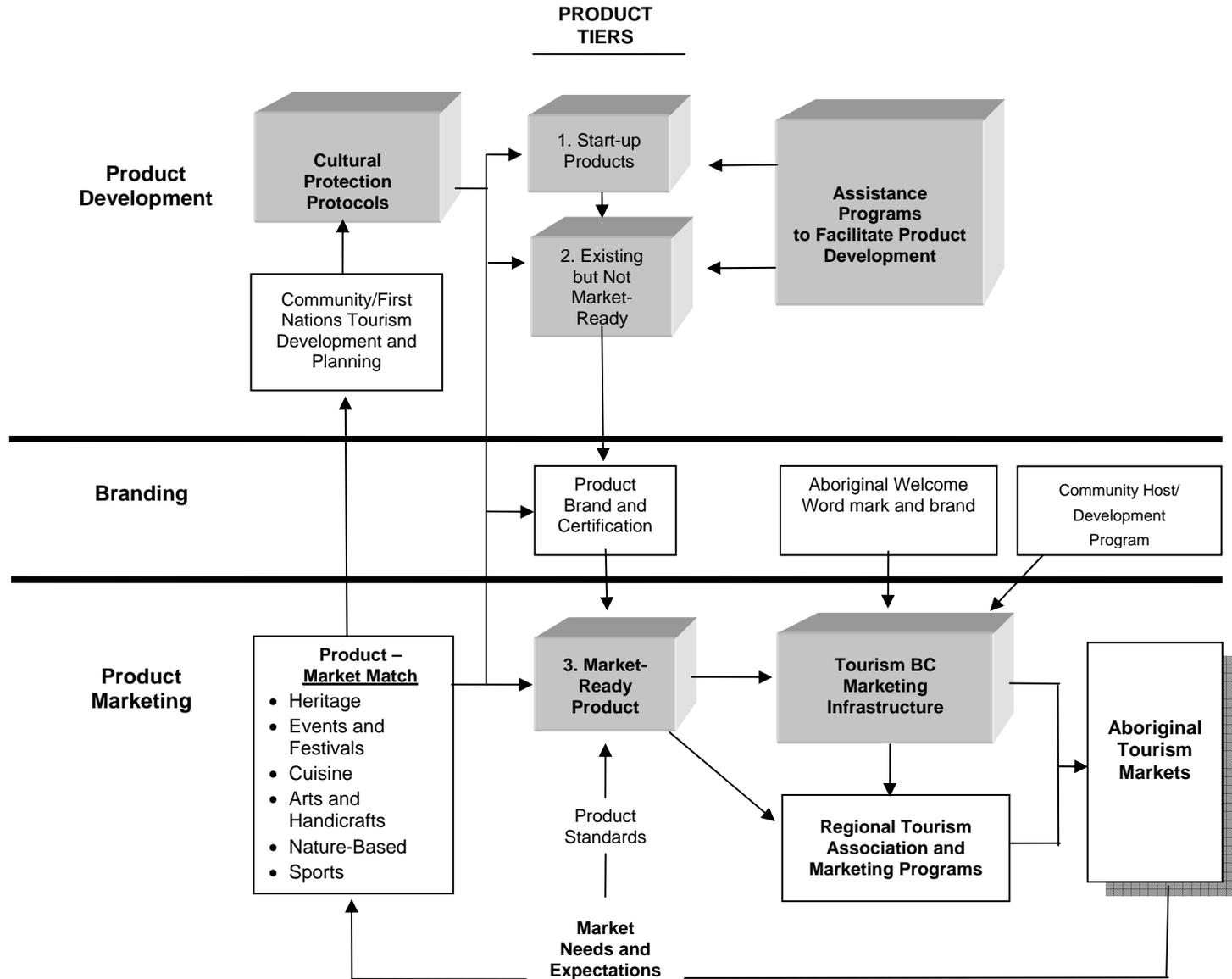
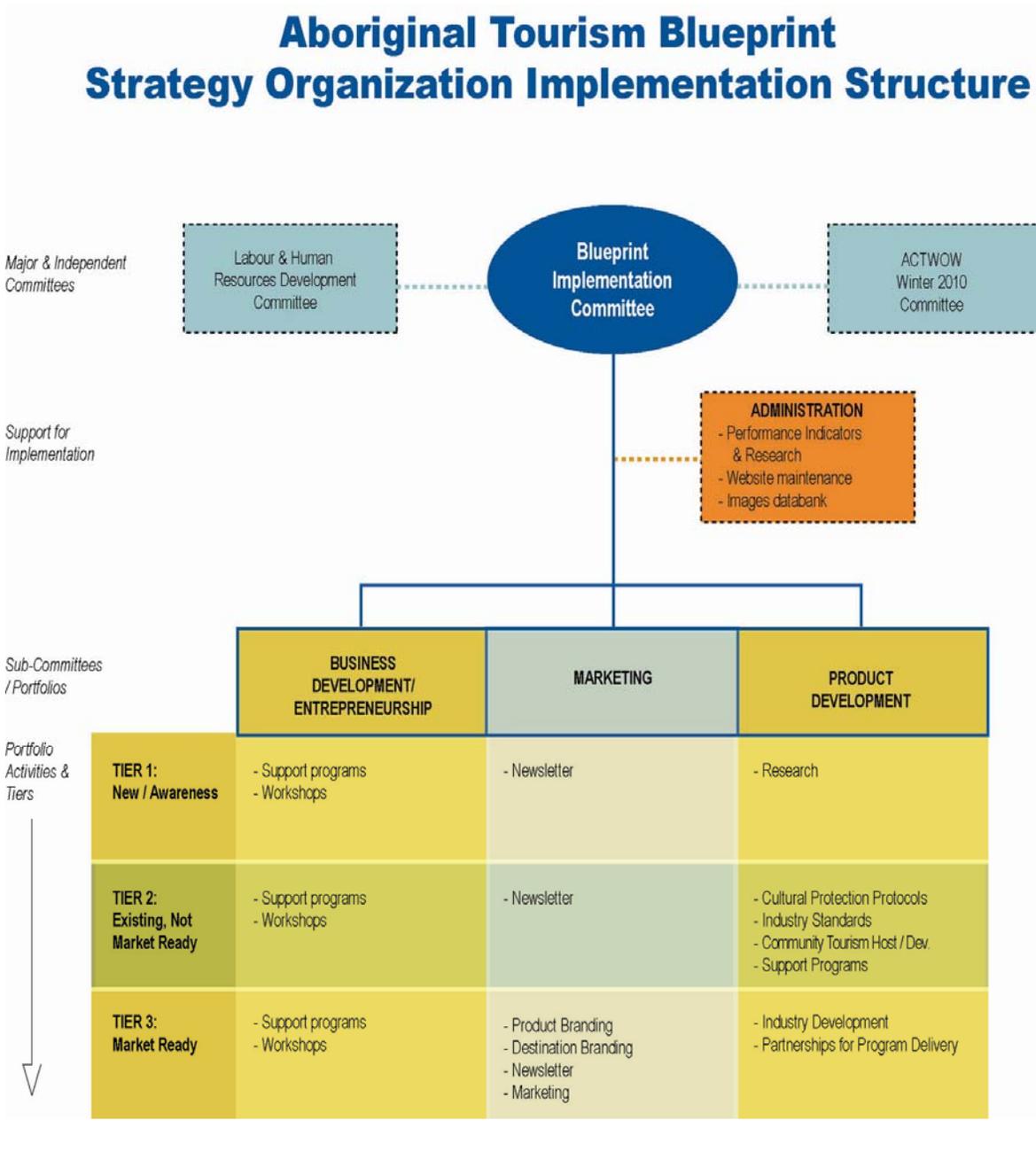
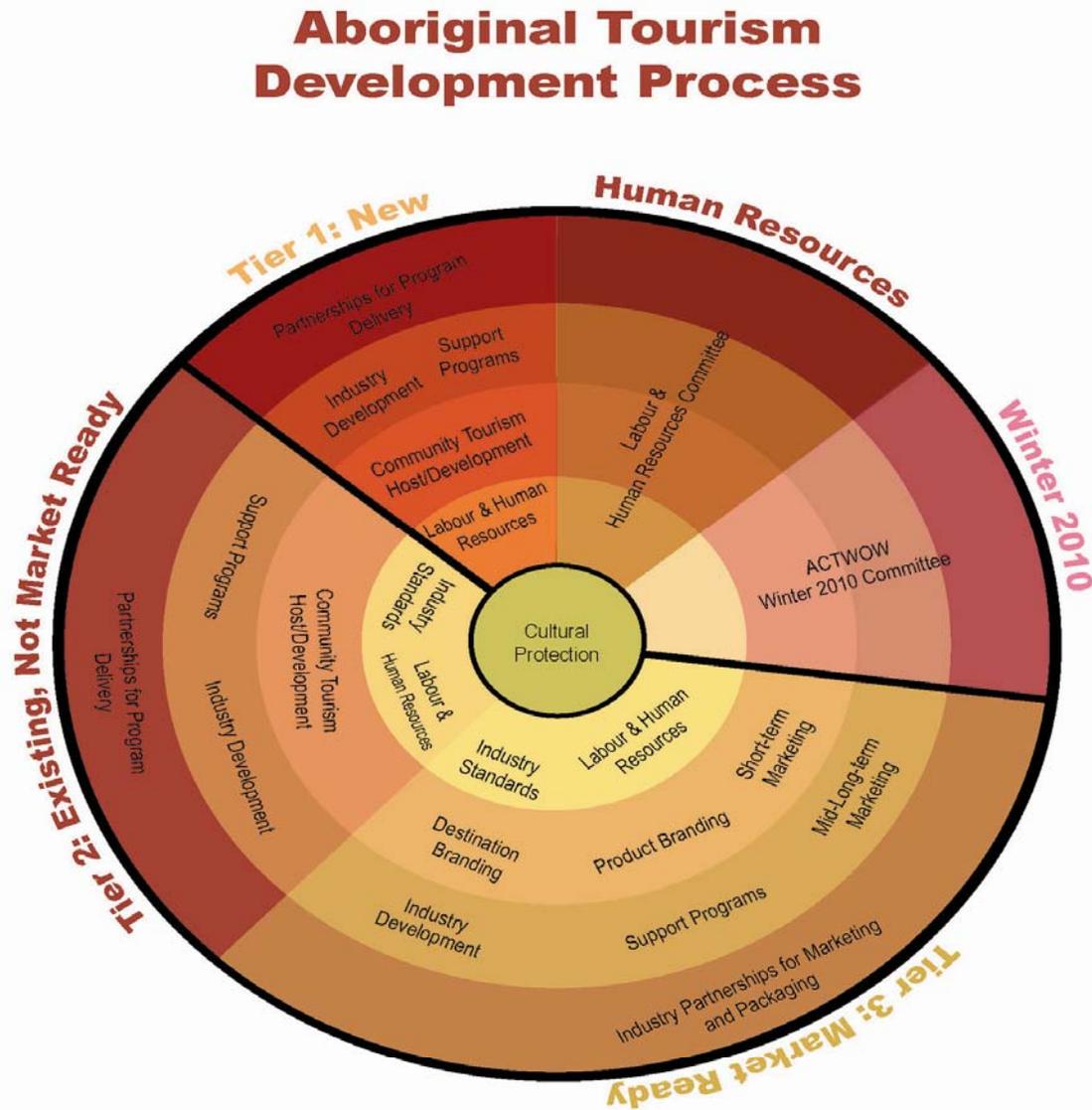


Exhibit 1.2: Aboriginal Cultural Tourism Blueprint Strategy Organizational Implementation Chart



**Exhibit 1.3: Aboriginal Cultural Tourism Blueprint Strategy Development Process**



**Implementation Rings**

Each ring indicates the order that tasks should be implemented.

**1. CORE** - Cultural Protection & Protocol

**2. Standards**

- Industry Standards
- Labour & Human Resources

**3. Branding**

- Community Tourism / Host Development
- Destination Branding
- Product Branding
- Short-term Marketing

**4. Development Tools**

- Industry Development
- Support Programs
- Mid-Long-Term Marketing

**5. Partnerships**

- Industry Partnerships for Marketing and Packaging
- Partnerships for Program Delivery

