

Aboriginal Cultural Tourism BLUEPRINT STRATEGY for BC

November 2005



Artwork by George Hunt Jr.
Photo by Todd Currar



ABORIGINAL
Tourism Association
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Welcome

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Aboriginal Cultural Tourism Blueprint Strategy for British Columbia

FINAL Report

November 2005

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Aboriginal Cultural Tourism Blueprint Strategy for British Columbia - Executive Summary

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 and 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 had 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 levels and no clear plan of action. ATBC brought together stakeholders that included the Province of BC, the Federal government (through Indian and Northern Affairs Canada and Aboriginal Business Canada) and Tourism British Columbia (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 included a comprehensive plan composed of a:

- 1) Literature Review - A complete review, analysis and summary of the existing literature on the nature and scope of the Aboriginal cultural tourism 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 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 throughout BC to solicit input for the Blueprint Strategy.
- 9) Online Aboriginal Community Input Questionnaires - ATBC provided direct email access and online feedback questionnaires 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 comprised of Beverley O’Neil (O’Neil Marketing), Judy Karwacki (Small Planet Consulting), Dr. Peter Williams, David Russell (DM Russell Consulting), and Cathy Holler (Blue Ice Consulting) 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’s design and approach is unique to date in Canada in that it combines comprehensive info-gathering sessions with Aboriginal operators, secondary research, and interviews with consumers, the travel trade and international tour operators. The fundamental premise underlying the 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 businesses that operate as part of the tourism sector, over 50% operate 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 impede the growth of Aboriginal tourism destinations worldwide. Yet in some of these destinations (e.g., New Zealand), 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 compromised the impact of investments made in product development assistance (from business planning to training support) and provides a “lesson learned” for BC.

Current Aboriginal tourism products in BC consists of adventure tourism products (31%), products associated with information centres and arts/crafts retail stores (20%) and various other Aboriginal tourism products 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 cultural tourism experiences in Canada and ninety-four (94%) said that they would offer more than one. These results indicated a clear desire by the Travel Trade to promote Aboriginal cultural tourism products in BC.

However, 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 modify 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 the previous findings, citing many issues and constraints but a desire to know more about the availability, access to, and quality of Aboriginal cultural tourism products. 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; the priorities are Aboriginal Cuisine, Heritage, Events and Festivals, and Arts/Handicrafts. Product segments that were identified as having less potential impact include Outdoor/Adventure and Sports.

Emerging Tourism Market Trends:

All of the tour operators interviewed agreed that new travel trends were reshaping their existing products. These trends included weekend getaways growing in popularity (with vacations becoming shorter), a growing demand for cultural experiences, 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. These cultural experiences could be catered to a larger audience and could be most effectively delivered if the **cultural element provides an enhancement to the experience**, rather than be the primary focus. 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 there were many common concerns among stakeholder groups with regard to the development of the Aboriginal cultural tourism sector. Over 20 major constraints and issues were identified, all of which have been addressed in the “Blueprint”. These challenges included: 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 existing 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 information tools and a practical cultural protection process that can be used by communities to establish their own protocols for sharing 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* – 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 primarily oriented 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 products:
 - **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 market-ready industry standards, hospitality and service levels ;
 - **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 create a foundation 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"> • New product development programs including coaching, business planning and financial facilitation • Community awareness • Community development • Mentoring • Financing • Web resources 	<ul style="list-style-type: none"> • Facilitation of operators to access existing programs • Providing appropriate training, business planning, market management and operations support • Financial programs • Mentoring services • Web resources 	<ul style="list-style-type: none"> • Integrated with TBC, regional tourism associations, Canadian Tourism Commission, Vancouver Organizing Committee for the 2010 Winter Games • Branding/positioning consistently applied by above partners • Cultural protection mechanisms in place • Facilitating marketing • Branding

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 products. 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. This would set a strong course for future business success, ensure successful role models and inspire the entry of new businesses.

Organizing for Implementation:

ATBC has been the driving force 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 British Columbia. 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, respectively. 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; Tourism BC; as well as Aboriginal representation by individuals who are widely respected in the Aboriginal Community at large and by 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 result for the mainstream tourism industry, stakeholders and agencies involved in supporting, promoting and expanding the industry. These benefits include:

- 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 for success in the worldwide indigenous and mainstream tourism industries. 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

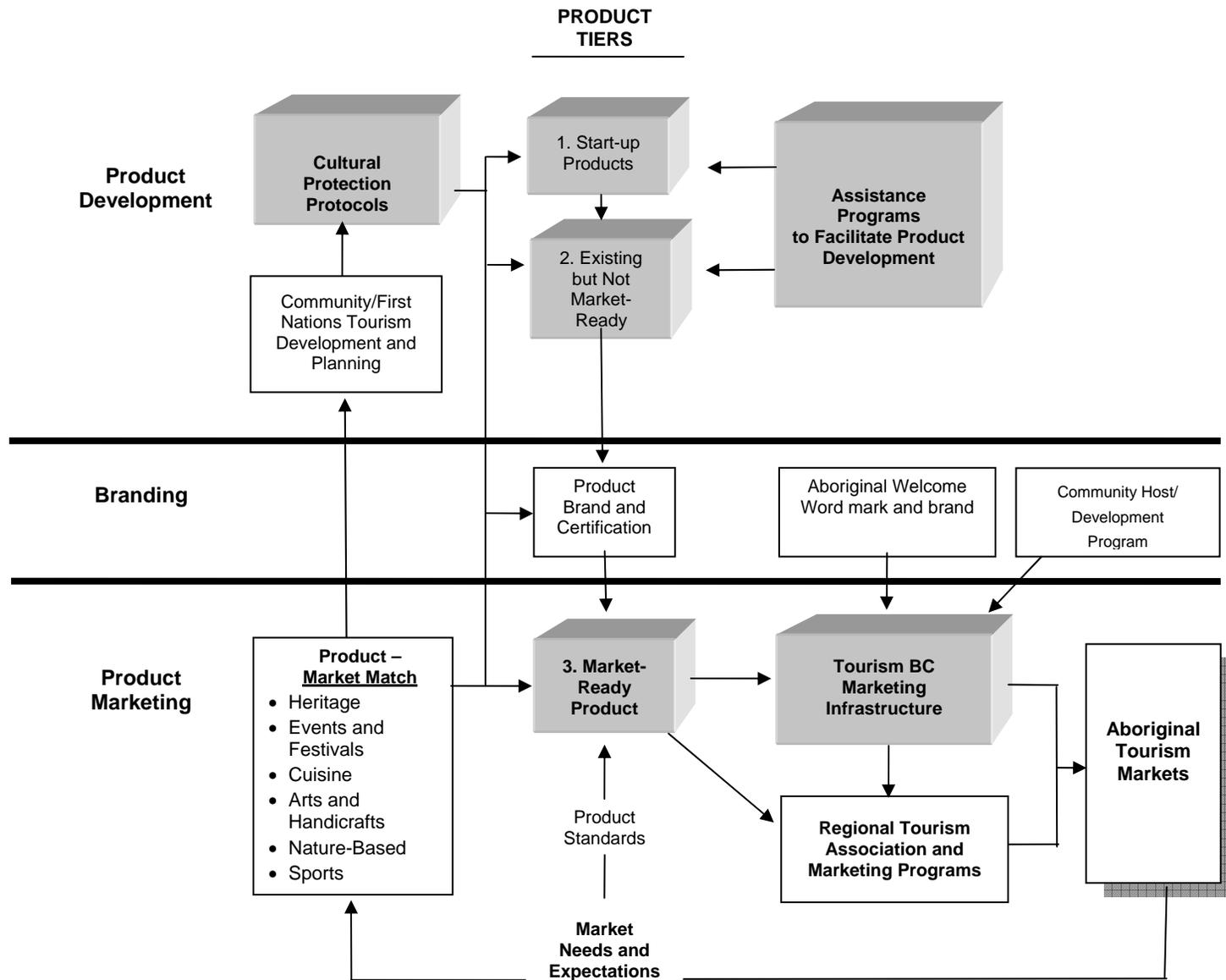


Exhibit 1.2: Aboriginal Cultural Tourism Blueprint Strategy Organizational Implementation Chart

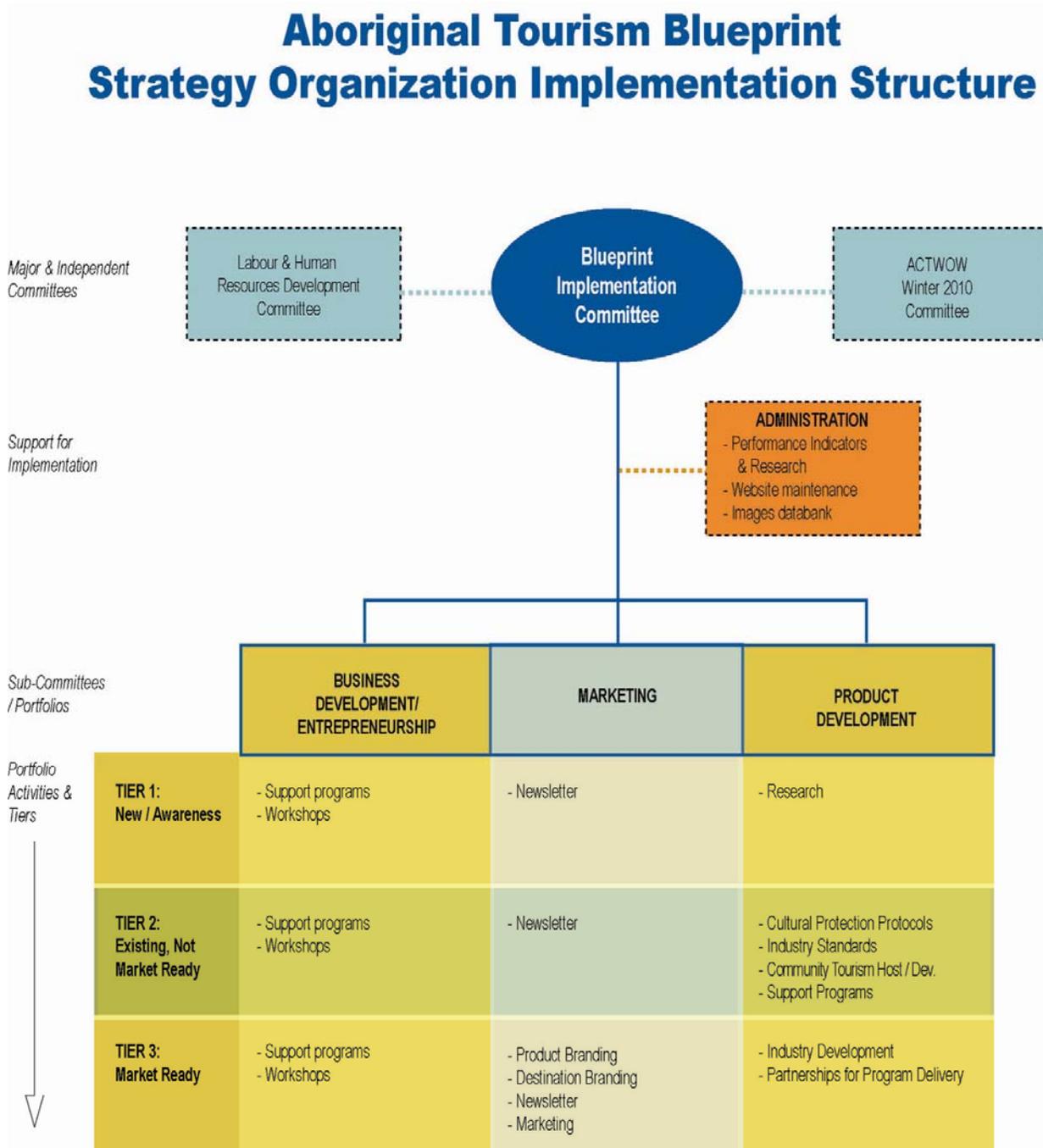


Exhibit 1.3: Aboriginal Cultural Tourism Blueprint Strategy Development Process

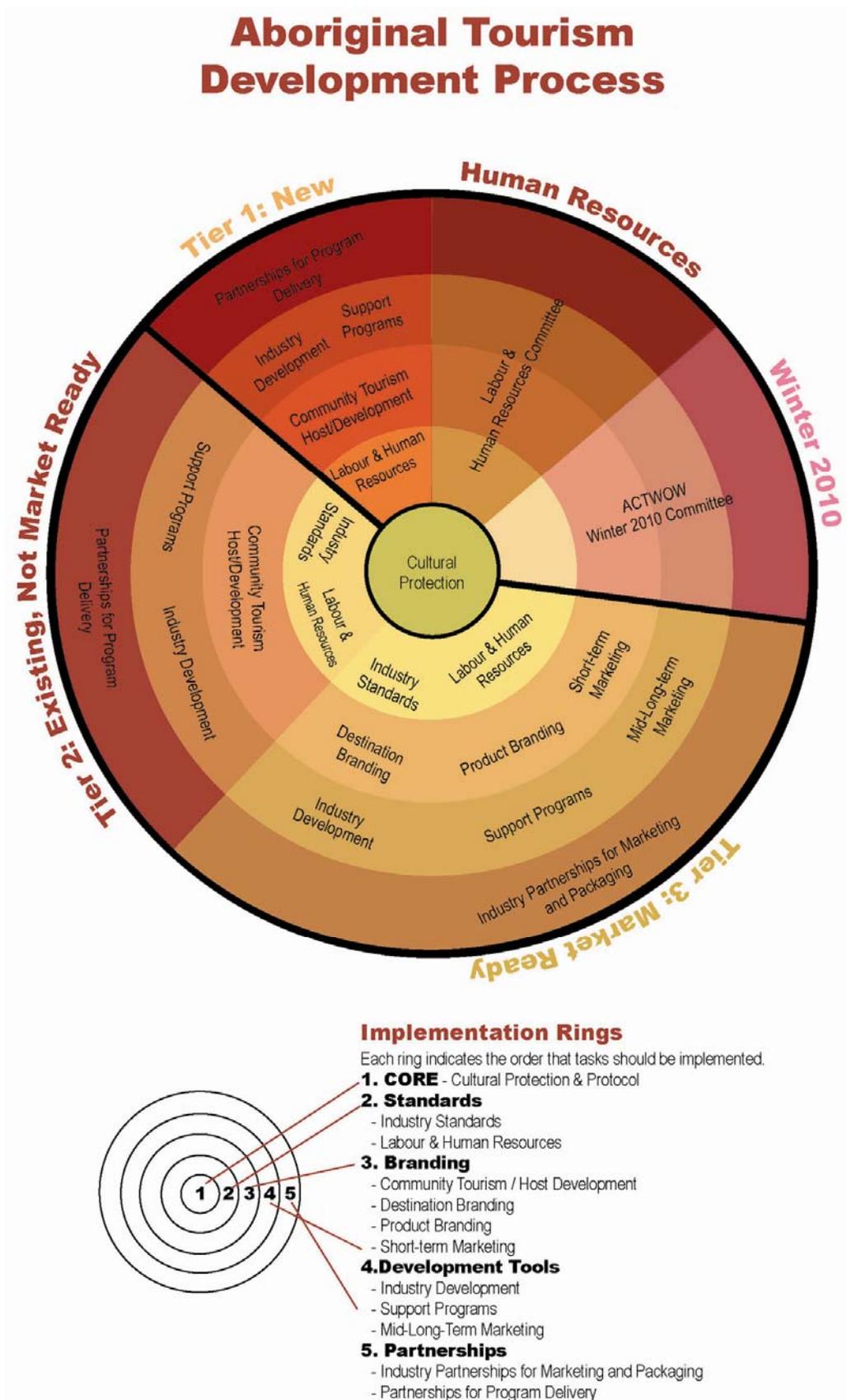


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1. Introduction

First Nations and Aboriginal cultures have long been integral components of the British Columbia's international tourism image. This diversity has provided BC with an opportunity to capitalize on growing worldwide demand for cultural tourism, nature tourism, educational tourism and responsible tourism experiences. Recognizing that a coordinated strategy is crucial to building a healthy and vibrant Aboriginal cultural tourism sector, the Aboriginal Tourism Association of British Columbia (ATBC), Tourism British Columbia (TBC), the Province of British Columbia, and the Federal Government (through Aboriginal Business Canada and Indian and Northern Affairs Canada) have partnered to produce the British Columbia Aboriginal Blueprint Strategy.

The BC Aboriginal Blueprint Strategy provides the framework for developing Aboriginal cultural tourism in a manner that is respectful of First Nations and other Aboriginal groups.¹ It offers a route for delivering long term, sustainable and wide-ranging benefits to Aboriginal and non-Aboriginal residents and visitors alike. The overall objectives of the Blueprint are two-fold. First, it is to map a realistic and achievable long term "Blueprint" for Aboriginal cultural tourism product development based on a clear understanding of where the industry is today. The plan gives special consideration to the 2010 Olympic and Paralympic Winter Games and to matching consumer demand with aspects of Aboriginal culture that Aboriginal communities are interested in sharing with visitors. The second objective is to develop an action plan that outlines the roles, responsibilities and resources that are needed to support the development of the Aboriginal cultural tourism industry.

Throughout this document several terms related to First Nations, Aboriginal peoples and their communities are used. These along with other commonly used First Nation and Aboriginal terms are explained at the end of the strategy in **Appendix A: First Nation and Aboriginal Terminology**.

1.1 Study Method

A phased approach was used in developing the strategy. Phase One was launched in the spring of 2003 and involved a series of research activities that provided the project Steering Committee and consultant team with a comprehensive understanding of the state of Aboriginal tourism in BC and globally, as well as a solid foundation upon which to build the strategy. The Phase One research components were compiled as a separate report and included:

1. **Aboriginal Cultural Tourism Definition** – Definitions of Aboriginal cultural tourism and Aboriginal tourism were gathered from around the globe. These were used as a basis for the development of definition that describes BC's Aboriginal tourism sector.
2. **Aboriginal Tourism Situation Review** – A comprehensive review of relevant BC tourism related studies and reports was completed together with a literature based competitive analysis of Aboriginal tourism destinations and development activities in New Zealand, Australia and New Mexico.
3. **Aboriginal Tourism Product Profile** – An inventory of BC Aboriginal tourism operators was done in 2003 by surveying existing Aboriginal tourism operations. This developed a profile of their: products and services; markets and marketing activities; employment

¹ The focus of the strategy is to bring Aboriginal cultural tourism to the forefront of the tourism market as opposed to the broader objective of increasing Aboriginal employment in the tourism industry. However, there is much overlap between the steps required to expand Aboriginal cultural tourism and those needed to generally increase Aboriginal involvement in the industry, therefore achieving the former objective will also provide progress toward to the latter objective.

practices; operating characteristics; communication tools; performance levels; and developmental challenges.

4. **Aboriginal Tourism Consumer Research** – A review of literature pertaining to consumer demand for Aboriginal tourism, as well as a comprehensive profile of Aboriginal tourists visiting BC in 2003. Based on data collected from consumer intercept surveys conducted at various locations in BC, the data describes the visitor travel planning habits, behavioural preferences, and satisfaction levels of these travellers to Aboriginal owned sites.

A summary of the key results of each of these research components is provided in **Section 2: Background Research Summary**.

Phase Two of the Blueprint Strategy was launched in early 2004. It is comprised of the tasks listed below, and then provides an action plan with implementation tasks and monitoring and evaluation activities.

1. **Community Consultation Sessions** – To ensure that First Nations and Aboriginal communities in BC participated directly in the development of the Blueprint Strategy, a series of focus group and community awareness / input sessions were held throughout the province. The views and recommendations of the communities collected through this process are presented in **Section 3: Aboriginal Awareness / Input Sessions**.
2. **Tour Operator Interviews** – A series of telephone interviews were undertaken with BC-serving tour operators located in Canada and internationally in order to acquire an industry perspective of the BC Aboriginal tourism sector and development opportunities for Aboriginal people. The results of the interviews and their related implications are reported in **Section 4: Tour Operator Consultations**.
3. **Product Market Match Analysis** – Research findings collected in Phase One together with other information collected from Aboriginal tourism operators, Tour Operator representatives, ATBC members and relevant tourism industry developers were used to assess the Product-Market Match for Aboriginal tourism in BC. The results of the process identify the most promising product development opportunities. This analysis is provided in **Section 5: Aboriginal Cultural Tourism Product-Market Match Opportunities**.
4. **2010 Olympic and Paralympic Winter Games Strategic Approach** – Opportunities associated with the 2010 Olympic and Paralympic Winter Games were explored along with challenges to realizing these opportunities. **Section 6: Vancouver 2010 Olympic and Paralympic Winter Games Opportunities** outlines ways in which 2010 Games related opportunities could be made available to BC Aboriginal communities and entrepreneurs. The section recommends a strategic approach for realizing these opportunities.
5. **Industry Development Strategy** – A strategy to guide short, medium and long term Aboriginal tourism industry, product and market development is provided. The framework, components, programs and implementation structure for this strategy are presented in **Section 7: Aboriginal Cultural Tourism Development Strategy-Framework**.
6. **Implementation Action Plan** – The final and most critical task in this project involved the development of an action plan for implementing the Aboriginal tourism strategy. **Section 11: Blueprint Strategy Implementation** recommends the way to systematically organize the strategy's initiatives, provides a timeline for their implementation, and suggests delivery responsibilities and budgeting resource requirements.

2. Background Research Summary

This section provides a summary of the key findings of the research conducted in Phase One of the project. This information provided background context and insights into various components of the BC Aboriginal cultural tourism strategy. The Aboriginal Cultural Tourism Definition findings are provided first, followed by the results of the Situation Review, and a summary profile of BC's Aboriginal tourism business and product survey. At the end of this section, the key findings of the consumer literature review and intercept surveys are presented. Collectively, this research provides a useful overview of the current Aboriginal tourism sector context in BC. It also offers a perspective on Aboriginal cultural tourism product and market development, constraints and issues facing the industry in BC and in other competitive regions around the globe. More detailed information on this research is available from ATBC.

2.1 Aboriginal Cultural Tourism Definition

As a first step to developing an Aboriginal Cultural Tourism Definition for BC, research was conducted to determine how other Aboriginal tourism jurisdictions define the cultural tourism experience. The research revealed that Aboriginal tourism is usually defined as tourism owned by or involving Aboriginal peoples. It typically focuses on highlighting the inter-related elements of heritage, history, values, land, lifestyle, customs and entertainment, as well as arts and crafts. As Aboriginal tourism evolves, its definition is becoming more precise. For example, New Zealand is now distinguishing between “Māori in Tourism (MiT)”, which encompasses all forms of tourism involving Māori ownership or employment, and “Māori Cultural Tourism (MCT)”, which incorporates Māori cultural values.

The research was invaluable to the development of a baseline definition of Aboriginal cultural tourism by the ATBC Board of Directors. This definition was used to guide the development of the BC Aboriginal cultural tourism strategy. It is as follows:

“...a cultural experience that must be tied directly to an Aboriginal person, or group of Aboriginal people.

The Cultural experience is authenticated in one of two ways:

1) As a direct result of permission provided through that person or person's Cultural Keepers, Elders or those designated with the authority to approve the sharing of the experience as it relates to that culture; or

2) As a result of experiences relating to either traditional Aboriginal culture or today's living culture as it is reflected through modern day lifestyle.”

2.2 Situation Review

The Situation Review was comprised of two major components:

1. **Aboriginal Tourism on the International Stage** – a review of other jurisdictions that have developed Aboriginal tourism.
2. **BC Aboriginal Tourism Situation Review** – a review of the current state of the nature and scope of the BC Aboriginal tourism industry.

The method used for the Situation Review included an extensive literature review, consultations with stakeholders interested in the BC Aboriginal tourism industry and an assessment of comparable destinations to identify successes and lessons learned. For the comparable destinations, the Project Steering Committee selected Australia, New Zealand and New Mexico. These destinations were selected based on the leadership they have demonstrated in fostering Aboriginal tourism development.

Product Development

The Situation Review indicated that Aboriginal communities and entrepreneurs are most interested in developing products that provide opportunities to showcase and teach visitors about their culture and spiritual attachment to land. Many mainstream tour operators are interested in adding short duration Aboriginal cultural tourism components to their program offerings but find that there are too few products located in or near gateway cities, national parks and major transportation routes. The findings suggest that strong potential exists for the development of half to full day Aboriginal cultural tourism experiences at gateway locations, or properties located on or near major transportation routes.

Constraints

The stakeholder consultations and Situation Review revealed a wide range of constraints to industry development. One of the key constraints relates to the relatively immature and fragmented character of the industry in BC and other jurisdictions studied. At the macro level, the Aboriginal tourism organizations that are leading the development of the sector do not have sufficient experience or capacity as yet to overcome this fragmentation. This constraint is compounded by the multitude of government agencies, many of which have differing and / or contradictory mandates that are shaping policies that influence the way in which Aboriginal tourism operators must conduct their business.

Other business and market constraints confronting the development of Aboriginal cultural tourism include:

- limited awareness within the Aboriginal tourism sector of the benefits of tourism development and a lack of knowledge of the available support programs and services;
- community restrictions, especially in relation to community approval and protocol processes for tourism development;
- human resource limitations, particularly in terms of inadequate staff capacity to address business management, tourism and hospitality service, and other operational issues;
- marketing constraints including issues related to the use of stereotypical imagery by tourism marketing organizations and a lack of integration of Aboriginal tourism marketing with provincial and regional tourism marketing initiatives;
- issues related to the development and maintenance of product quality, reliability and authenticity standards;
- partnership issues between Aboriginal operators and the mainstream tourism sector; and
- limited investment and support programs for Aboriginal tourism product development.

Lessons from Comparable Destinations

The comparable destinations review revealed a number of “lessons” that can help to guide the development of an effective Aboriginal cultural tourism “Blueprint” strategy for BC. They are as listed below.

- In many destinations Aboriginal tourism associations are struggling for viability due largely to the industry's early stage of evolution. This makes their ability to deliver effective and consistent marketing programs challenging.
- Many comparable destinations have developed tourism strategies. However, none has successfully implemented these strategies in a comprehensive fashion.
- The fragmented approach to the industry's development in these regions is weakening the ability and capacity of regional or national Aboriginal tourism associations to implement phased and systematic programs. While a variety of development and marketing programs have been implemented, no integrated plans have been systematically delivered at a national or provincial level.
- All comparable destinations have identified developing partnerships with mainstream tourism organizations as being critical to increasing the capacity and reach of Aboriginal tourism operators. However, clear strategies for creating such partnerships are not well developed. This lack of partnership capacity within the Aboriginal tourism sector makes it difficult to broker appropriate alliances.
- Comparable destinations have made good progress on defining cultural tourism experiences from an Aboriginal tourism perspective. To varying degrees their definitions address: the extent to which traditional activities and resources can be shared with visitors; effective approaches to product certification; and appropriate strategies for building Aboriginal product "brands".
- Despite the growing market for cultural tourism, the investment in Aboriginal tourism product development has not been matched by the creation of the marketing channels needed to support the promotion of those attractions.

The Way Forward

The Situation Review suggests an approach for assembling an Aboriginal Cultural Tourism Blueprint Strategy for British Columbia. The approach has three main components:

1. Developing an integrated approach to Aboriginal cultural tourism development and facilitation including the creation of Memorandums of Understanding (MOUs) and other mechanisms between the Aboriginal cultural tourism community and partner agencies / organizations for coordinated program delivery.
2. Creating effective marketing mechanisms for driving travellers to market ready Aboriginal cultural tourism products, facilitating tour operator partnerships, and establishing a sustainable marketing infrastructure; and
3. Establishing an integrated approach for delivering Aboriginal cultural tourism development and marketing support programs.

2.3 Aboriginal Tourism Product Profile

In early 2003, Aboriginal tourism businesses were surveyed in order to develop an inventory and profile of their operations. Owners or other representatives of the businesses were asked questions concerning the type of business they operated, when the business was established, employment levels, cultural product offerings, marketing activities, target markets, as well as other questions

related to operating practices and challenges. (Questionnaire is attached in **Appendix D: Aboriginal Tourism Survey**).

Overall, representatives of 110 Aboriginal tourism businesses shared their views through telephone interviews or by completing a fax or email survey. About 70% of these businesses were majority-owned Aboriginal businesses providing tourism products and services directly to visitors or the travel trade.

The greatest number of Aboriginal owned businesses involved the operation of attractions. However, many businesses offered more than one type of tourism product. Most frequently, these businesses included a combination of accommodation, food and beverage services in their operations. Three-quarters of the businesses indicated that they offered various forms of cultural experiences as part of their product offerings.

Exhibit 2.1: Number of Tourism Businesses by Sector 2003 (percent)

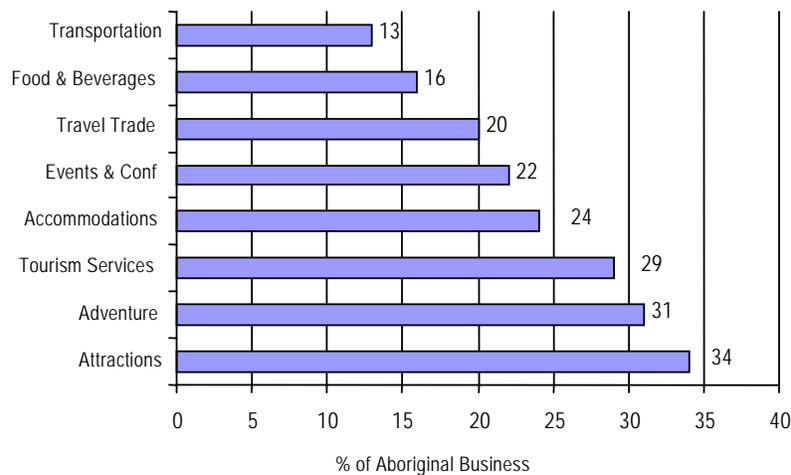


Exhibit 2.1 illustrates the range of Aboriginal tourism businesses inventoried in the product survey. Within these categories the types of products and services provided are as listed below.

- **Transportation** – ferry, taxi and bus tours
- **Food and Beverages** – restaurants, snack bars, food stands
- **Travel Trade** – coordination of travel services, tour packagers / operators
- **Events and Conference** – festivals, feasts, pow-wows, sports tournaments, and other cultural celebrations
- **Accommodations** – hotels, motels, resorts, bed and breakfast, campgrounds, traditional accommodations
- **Adventure Travel** – river rafting, guided tours, golf courses, hiking trails, horseback riding
- **Attractions** – museums, cultural centres, interpretive villages, historical walking tours, casinos, heritage facilities

Examination of the responses provided by these businesses revealed several valuable insights into the character of each of product categories.

- About three-quarters of these businesses worked with Visitor Information Centres and regional tourism associations to promote their ventures.
- About one-quarter of the businesses responded to messages within three hours and nearly half of them reported answering visitor requests within the same day. Alarming, 25% took a full day or more to return calls.
- The most common culturally focused product offerings in Aboriginal operations were guided tours, Aboriginal décor, food and feasts, displays and exhibits, as well as story telling.
- Systems for gaining approval for Aboriginal cultural tourism were present in about half of the communities where Aboriginal tourism businesses operated. Elders and ‘Cultural Keepers’ granted approval for sharing or use of the Aboriginal culture in nearly 90% of the businesses.
- Food and Beverage operations offered the highest level of average full-time peak season employment per operation (13.4 persons). Lesser but still significant levels of employment were associated with adventure travel (11.5 persons), accommodation (10.9 persons), and events / festivals (9.3) operations. Attractions provided the lowest average number of full-time peak season jobs (1.3 persons).
- More than half of the attraction operations reported that they earned a profit or broke even in the 2002 season; this was the top performing sector. Conversely, the majority of accommodations providers reported an operating loss in 2002.
- The majority (80%) of Aboriginal tourism businesses reported that their sales had stayed level or increased since they began operating. Regardless of their profitability status, about three quarters of them (76%) were planning for expansion in the next three years.
- The top three operating challenges for current Aboriginal tourism included limited marketing, human resource capability and availability of capital.

Key characteristics of each of the sectors examined are summarized below.

- **Accommodations** – the types of accommodations operated were more often RV parks or campgrounds or resorts / lodges. Less than 10% of accommodation properties were motels / hotels or culturally themed accommodation facilities. Bands owned almost half of the accommodation facilities. More than half of these businesses were established between 1990 and 1999. Adventure travel (58%) and food and beverage services (54%) were common add-ons to accommodation operations. Accommodation facilities were also most likely to be seasonal operations. Nearly 60% of them operated only in the summer and employed up to three Aboriginal people full-time. Most of these businesses were located in rural and remote settings appealing primarily to residents of BC, Americans and other Canadians. In nearly 30% of the businesses, Europeans represented up to 10% of total visitors. Typically, marketing efforts targeted residents of BC (83%), the United States (63%), western Canadian Provinces (54%) and Europe (46%). Groups, individuals and meetings / conventions were the primary target groups for their marketing efforts.
- **Adventure Travel** – About 42% of Aboriginal tourism businesses offered adventure travel products featuring wildlife viewing, boat tours, and guided / outfitter tours. These businesses were frequently aligned with an attraction, accommodation or travel trade venture. Adventure travel businesses were mostly operated in the summer (65%), although some also operated solely in the spring (55%) or fall (45%) seasons. Employment is usually kept to one to three people working full-time and / or part-time, with the majority of employees being Aboriginal. More Adventure travel businesses than other sectors worked with Visitor Information Centres and tour operators including bus companies to promote, package or market their business.

- **Attractions** – All attraction operations were Aboriginal-owned. More than 70% of them operated year round and on reserve. BC residents represented the largest share of visitors to Aboriginal attractions. In 41% of these Aboriginal attractions they represented 26 to 50% of visitors, and another 30% of these businesses indicated they represented 51 to 75% of visitors. A further one-third indicated that European visitors represented 11% to 25% of their market. More than half of respondents indicated that up to 5% of their time was spent on marketing activities targeted at attracting individuals, tour and school groups to their facilities. The Attractions operators often responded to messages within a 24 hour period.
- **Food and Beverage** – Frequently owned by individuals, these facilities were often operated in conjunction with accommodation businesses (81%). A large proportion of them (69%) operated year round (69%). About two thirds of them (69%) offered cultural foods as part of their menu options. Culturally oriented guided tours and décor were available in more than half of these operations. More than a third of them provided storytelling, feasts, arts and crafts demonstrations, audio-visual presentations, pre-recorded Aboriginal-style cultural music, and print materials on the local culture. About a quarter of them had provided cultural exhibits, displays and dance performances. Over half of these food and beverage operations were committed to returning calls within three hours of receipt.
- **Events and Conferences** – cultural festivals, performances, feasts and pow-wows were primarily (90%) operated by fully Aboriginal owned entities and typically in conjunction with attractions and other tourism service providers. These events occurred most often during the summer and less frequently in the spring. BC residents represented nearly three-quarters of event participants. On average, these events created short term full-time employment for between 11 to 20 event staff in peak season. The majority of employees at these operations were Aboriginal. Overall, about 86% of these operations had experienced sales increases since they began operating. About a quarter of them (23%) reported an operating loss in 2002.

In the operating year preceding the survey (2002), about 35% of all Aboriginal tourism businesses earned a profit, another 23% broke even, and approximately 32% operated at loss. The remainder (10%) did not indicate their operating performance. The following characteristics defined those businesses which had earned a profit or broke even:

- More Attractions were operating at a profit or break-even level than any other type of business.
- Businesses owned by individuals were more likely to be operating at a profit or break-even than those involving Band ownership.
- Business and marketing plans existed in more than 70% of successful businesses. As well, successful businesses used outside advisors such as accountants more frequently than did less profitable operations.
- Businesses operating year round were more likely to be profitable than those that only operated on a seasonal basis.
- Successful businesses were more likely to have incorporated a cultural component or experience into their operations.
- Nearly all successful businesses (93%) had an answering machine versus only about one-fifth (21%) of businesses operating at a loss. Further, more than 60% of successful businesses also had their own Internet web domain name.
- Successful businesses returned messages within three hours of receipt of the calls (65%), while businesses operating at a loss were slower to respond.

- Continuous growth or break-even since business start-up was a common pattern in 95% of successful businesses.
- About 15% of successful businesses felt that an “unfavourable Aboriginal image” was a challenge to operating their operations effectively.

2.4 Consumer Research – Market Potential

To fully understand consumer interest and engagement in Aboriginal tourism in British Columbia, a three-phased travel market assessment was conducted.

- **Phase 1:** Initially a review of existing secondary pleasure travel market data sets and reports was conducted to establish general consumer travel trends related to Aboriginal tourism in British Columbia and Canada in particular. In addition, differences in existing Aboriginal tourism market information related to this province were identified.
- **Phase 2:** Gaps in British Columbia’s Aboriginal travel market information base not addressed by secondary data sources were examined in a more detailed consumer travel market study conducted in 2003. First, an intercept survey of 2,329 randomly selected travellers visiting Aboriginal tourism sites and / or public Visitor Information Centres was conducted between June 15 and September 15, 2003. This survey focussed on determining the pre-trip planning motivations, information search patterns and anticipated trip behaviours of these travellers.
- **Phase 3:** Subsequent to the intercept survey, 620 of the travellers who volunteered to participate in a post-trip mail or Internet survey were interviewed. This post-trip survey examined their actual trip behaviours, product satisfaction levels, and anticipated future Aboriginal tourism travel propensities. It was conducted between July 15 and November 15, 2003.

In combination, these three travel market assessments provided valuable insights into current market demand, as well as those drivers that will foster further consumer market growth for Aboriginal cultural tourism in British Columbia. Some of the key findings emanating from this consumer market research that drive this strategy follow.²

Previous national and international travel market studies confirm a strong latent demand for Aboriginal cultural tourism in Canada. Learning about and / or experiencing Aboriginal and other cultures is an important destination selection factor for a significant proportion of Canada’s domestic and international travellers. However, the extent to which this interest translates into actual participation is limited. This situation is apparent in British Columbia where opportunities to develop and market Aboriginal cultural tourism experiences that match travel market preferences are abundant yet market penetration remains limited.

Based on this consumer market research, several overriding traits characterize the province’s Aboriginal cultural tourism consumer markets. These traits help shape the focus of market and product development activities identified in this strategy.

² Complete results are available on the Aboriginal Tourism BC website www.atbc.bc.ca in the report entitled, Aboriginal Tourism BC Blueprint Strategy: Consumer Intercept Surveys Final Report.

From a market development perspective, British Columbia's primary Aboriginal cultural tourism markets tend to be well educated, upper middle income wage earners, female, baby boomers that are:

- visiting primarily from British Columbia (23%), other parts of Canada (22%), the United States (29%), and various other overseas countries;
- including Aboriginal cultural tourism in their British Columbia travels for the first time;
- planning their trips at least 3 to 8 weeks in advance;
- planning their trips on their own using informal sources of information; and
- having difficulty finding the pre-trip information needs to plan for the Aboriginal cultural tourism parts of their BC trips.

From a product development perspective, British Columbia's primary Aboriginal cultural tourism markets tend to:

- seek unique destinations where they can increase their knowledge, feel personally safe, experience pristine natural areas, and learn about different cultures (e.g., Aboriginal) as part of larger touring trips;
- express most satisfaction with those BC Aboriginal cultural tourism experiences that help them to view and / or purchase Aboriginal crafts and handiwork, and tour Aboriginal museums and art galleries;
- report most positive impressions about those BC Aboriginal cultural tourism experiences, which help them to learn about Aboriginal culture / heritage, enjoy Aboriginal friendliness and receptiveness, experience Aboriginal people, and appreciate Aboriginal arts and crafts;
- express least satisfaction with those BC Aboriginal cultural tourism opportunities, which help them to experience Aboriginal facilities, performing arts, cuisine, languages, sporting events, and traditional natural environments with Aboriginal guides;
- perceive the main competitive advantages of Aboriginal cultural tourism experiences in British Columbia compared to its primary competitors are the:
 - quality / uniqueness of Aboriginal arts, crafts, cuisine, and architecture;
 - willingness of Aboriginal peoples to share their knowledge and heritage; and
 - culture and natural environment linkages in Aboriginal cultural tourism.
- feel that opportunities to experience Aboriginal cultural tourism products and services are too limited, and not more competitive than those offered elsewhere in North America; and
- express especially strong interest in tourism experiences built around Aboriginal themes related to heritage, arts and crafts, cuisine, festival and events, nature-based, and sporting activities.

3. Aboriginal Awareness / Input Sessions

The views, ideas and recommendations of Aboriginal communities and entrepreneurs in BC were integral considerations in the development of the Aboriginal Cultural Tourism Blueprint Strategy. These perspectives and recommendations were collected through an interactive consultative process that included focus groups, community open house meetings, and a survey of stakeholders throughout British Columbia. In the following sections, an overview of the method and logistics for these information collection sessions is described and a summary of the information gathered is provided.

3.1 Overview

Seven (7) community regional open house sessions were held throughout BC. These sessions were open to Aboriginal and non-Aboriginal people in each region. Overall, they attracted 239 people, ranging from First Nations leaders and economic developers to Aboriginal tourism operators, Aboriginal organization representatives, government and tourism agencies, training personnel, and regional tourism industry representatives. The session sought participants' views on Aboriginal cultural tourism development issues as regional market opportunities, methods of creating awareness of First Nations' cultures and heritage, challenges facing existing and proposed Aboriginal tourism businesses, and other barriers or constraints to Aboriginal tourism development.

In addition to the open house sessions, three focus groups were held with Aboriginal leaders who were responsible for dealing with business, culture, leadership and economic development issues in their respective communities. To assure inclusive representation from these spheres of Aboriginal development, a regional Aboriginal host, ATBC and the Consulting Team cooperatively selected focus group participants. Each focus group had a maximum of ten people. The participants were asked to provide their views and ideas on a series of issues related to the future development of Aboriginal cultural tourism in their respective regions. The participant selection criteria and the issues explored are listed in **Appendix B: Aboriginal Focus Group Questions**.

To ensure inclusive and full participation by as many interested individuals as possible, partnerships were established with regional organizations to assist with coordination logistics, development of participant lists, recruitment of participants, and registration of session attendees. Promotion of each session was coordinated by ATBC that distributed direct mail, fax and email-outs, as well as conducted a media relations program (e.g., media releases, follow-up telephone calls, scheduled media interviews). ATBC complemented these activities by adding 'Blueprint' project information web pages to ATBC's website. Prepared by the Consulting Team, these pages provided information on the project, an executive summary of the Situation Review findings, and summary notes from each of the regional sessions. A summary of the locations and attendance at each of the open and focus group sessions is listed in **Exhibit 3.1**. A list of session participants is attached in **Appendix C: Regional Sessions Attendance List**.

Exhibit 3.1: Regional Aboriginal Tourism Sessions 2004

BC Tourism Region	Location	Date	Regional Host	Attendance	
				a.m.	p.m.
Vancouver Island	Snuneymuxw First Nation Office, Nanaimo	Feb 25	Snuneymuxw First Nation	n / a	30
Kootenay Rockies	St Eugene Mission Resort, Cranbrook	Feb 27	KABAS Kootenay Aboriginal Business Advocate Society	10	30
Northern BC	Prince George Aboriginal Friendship Centre, Prince George	Mar 3	Aboriginal Business Development Centre	8	30
Vancouver, Coast and Mountains	Xay:tem Longhouse Interpretive Centre, Mission	Mar 5	XÁ:ytem Longhouse Interpretive Centre	8	20
Thompson Okanagan	Kamloops Indian Band Chief Louie Hall, Kamloops	Mar 8	Community Futures Development Corporation of Central Interior First Nations	n / a	50
Northern BC	Howard Johnson Hotel, Prince Rupert	Mar 10	Tsimshian Tourism Inc.	n / a	40
Vancouver Island	Tin Wis Best Western Resort, Tofino	April 26	Ma-mook Development Corporation	n / a	13
TOTAL				26	213
Total Participation				239	

Key points and perspectives derived from these consultations are summarized in **Section 3.2**.

3.2 Community Consultation Session Perspectives

The community consultation participants felt that greater Aboriginal participation in tourism development could be of potential value to BC's entire tourism industry. Overall, they believed that Aboriginal imagery and culture offered an especially appealing means of differentiating BC and Canada in the international marketplace. They felt that there was considerable opportunity to integrate aspects of Aboriginal culture and lifestyle into BC's destination image and evolving brand.

3.2.1 Benefits of Tourism

In addition, the session participants suggested that future Aboriginal cultural tourism development offered many opportunities to provide a variety of other benefits to Aboriginal communities. These were related to the qualities listed below.

- **Economic Development** – provides communities and individuals with a range of economic development opportunities and benefits. These include economic diversification, employment, entrepreneurship and training and education;
- **Cultural Strengthening** – provides an important means and motivation for Aboriginal communities to care for and maintain their heritage and cultural practices;
- **Social Exchange** – provides an important vehicle for cultural exchange by offering visitors opportunities to experience and understand Aboriginal community heritage and culture directly from the originators of that culture. Simultaneously, host communities gain the opportunity to learn about the cultures of their visitors. These exchanges can be catalysts for cultural healing and intercultural understanding which can help to reduce racism and foster cultural pride;
- **Self-determination / Control** – helps Aboriginal people to become more self-reliant and assume more control of their own destinies. Tourism development would require Aboriginal hosts to gain control of their culture and determine what aspects of it they would share with visitors. Through culturally based tourism they felt they have a greater say over their own lives and being paid to do what they loved;

- **Heritage Appreciation** – helps Aboriginal youth become more familiar with and proud of their heritage by teaching them about their cultural traditions and values;
- **Political Positioning** – raises awareness of land ownership, governance, wildlife and environmental management and resource sharing issues central to treaty negotiations; and
- **Alliance Building** – creates linkages and sharing between Aboriginal communities and businesses for long term economic, social and cultural development.

3.2.2 Product Opportunities

The session participants confirmed that tourism product development options preferred by First Nation communities should focus on opportunities to showcase and share Aboriginal cultures with visitors. Product development opportunities identified by these participants included the kind listed below.

- **Accommodations** – such as tepees, longhouses and camps that incorporated cultural features and experiences;
- **Authentic arts and crafts** – displayed in Aboriginal controlled display and retail facilities / spaces where tourists could watch and interact with artists and artisans;
- **Heritage and culture based attractions** – such as interpretive centres, living villages, theatres and art galleries. Museums were also mentioned although some participants felt that these were too costly to develop and operate. They also felt that such attractions should focus less on displaying artifacts and concentrate more on offering interactive programs. Such attractions were considered to be critical core features needed to anchor the development of tourism product ‘clusters’ and related visitor staging areas;
- **Cultural products** – that showcase unique traditional and contemporary living cultures. These might range from re-enactments of traditional practices to cultural performances and community tourism experiences that included local cuisine, arts and handicrafts;
- **Eco-tourism and adventure tourism tours** - such as front, mid and back country tourism products with multi-experience components including cultural dimensions;
- **Experiential learning experiences** – such as cultural activities guided by host community members;
- **Festivals and events** – including traditional and contemporary celebrations, native music festivals, and traditional games;
- **Aboriginal tourism packages** – combined with mainstream and other non-Aboriginal tourism products;
- **Agri-tourism products** – such as visiting and learning about Aboriginal food harvesting and agricultural methods, tasting Aboriginal harvested produce and participating in agricultural cultivation activities;
- **Cuisine tourism** – products including those featuring food preparation, cooking classes and harvesting ingredients;
- **Cultural corridors / trails tours** – involving visitors experiencing natural and cultural landscapes;
- **‘Product clusters’** – entailing a variety of communities and operators in a region working together to create groups of products and activities enhancing the attractiveness of the area to visitors; and

- **Ambassador activities** – involving performing arts troupes, musicians and youth groups raising awareness of Aboriginal cultures in BC and elsewhere.

3.2.3 Community Tourism Management Issues

While significant interest in incorporating tourism into future development plans existed, many of the session participants expressed apprehension about introducing tourism into their communities and economy. This apprehension was especially apparent with First Nation political and cultural groups. Their concerns were especially important, as these groups are responsible for decisions concerning the eventual approval, endorsement and promotion of Aboriginal tourism initiatives. Their concerns related to the development of Aboriginal tourism were as follows:

- **Political** – limited political leadership to guide tourism development, little knowledge of tourism’s potential and resource requirements, management challenges with the mixing of business and politics and inter-Band conflicts, lack of clear decision making guidelines and approval processes for Aboriginal tourism development; and
- **Cultural** – loss of control of culture and identity; limited understanding of individual Band cultures as well as those of others.

3.2.4 Other Issues and Constraints

Session participants identified a range of other Aboriginal cultural tourism development issues and concerns that they felt should be addressed in the Aboriginal Cultural Tourism Blueprint Strategy for BC. These concerns echoed many of the Situation Review and Operator Survey findings described earlier in this report. They were:

- **Lack of Awareness** – limited understanding of tourism’s benefits and costs on their communities;
- **Lack of Product Standards** – limited awareness of the authenticity and quality of products and services being offered as “Aboriginal” goods. Participants expressed concern about the limited involvement or approval of First Nations in developing and distributing these products and services;
- **Negative Attitudes** – negative stereotyping and racist activities are reducing opportunities for future involvement of Aboriginal groups in the development of tourism;
- **Environmental Impacts** – potential environmental effects of tourism development must be addressed prior to developments being approved. They also fear that tourism development will result in the loss of their traditional land and resources unless pre-emptive policies are established;
- **Financial Issues** – the high costs of tourism product development and marketing make participation in the industry challenging. They feel that limited opportunities for securing the financing required for tourism operations on their lands exist;
- **Government Bureaucracy** – bureaucratic and policy constraints limit their development opportunities. They have limited information concerning how to gain appropriate permits and licenses for Aboriginal tourism ventures;
- **Human Resources** – limited ability to identify, attract and develop skilled front-line and management staff for tourism operations;
- **Linkages** – limited linkages with mainstream tourism industry make it difficult to access market information, develop products, establish partnerships, network with other Aboriginal cultural tourism businesses, and market products and services effectively;

- **Marketing** – limited access to effective marketing mechanisms and resources constrain their ability to market products and services effectively;
- **Self-determination** – disabling government policies limit opportunities to regain self-determination and self-governance over traditional lands and resources needed for personal, cultural and tourism development;
- **Training** – limited access to skill training and human capacity building related to tourism, hospitality, business planning and management, marketing, and entrepreneurship;
- **Capacity** – general lack of human capacity to capitalize on market opportunities, as well as limited Aboriginal personnel with cultural knowledge; and
- **Business / Product Development** – limited access to lands, resources and infrastructure required for product development. Unrealistic expectations of markets available for Aboriginal cultural tourism products and services create financially unsustainable operations.

3.2.5 Tourism Session Strategy Recommendations

During the sessions, several recommendations on ways to establish and protect Aboriginal cultural tourism products and services were suggested. These are summarized in this section.

Cultural Protection and Industry Standards

Despite their apprehensions about Aboriginal tourism development (especially culturally based products and services), session participants expressed more interest than concern about encouraging such activity. They suggested several ways of using tourism as a mechanism for helping to preserve aspects of their culture and heritage. These included establishing:

- **Community-driven product standards** – at the inception of any cultural tourism planning process, standards, guidelines and protocols outlining how the First Nations’ culture will be shared with visitors should be established. These standards should be developed by recognized First Nation ‘Cultural Keepers’ and approved in a manner acceptable to that culture;
- **Product brands** – creating a brand or stamp of recognition that would help visitors to identify and select Aboriginal cultural tourism products that are formally approved by the originators of that culture as being appropriate and respectful. This approach would help to ensure that visitors were aware of the benefits of selecting these products versus those that are unauthorized replicas;
- **Codes of ethics** – establishing agreed upon standards for the promotion and shared use of Aboriginal culture by Aboriginal and other tourism operators. This code would include the recognition of other peoples’ protocols for sharing cultures;
- **Visitor education** – providing visitors with pre-visit information concerning the context of, and accepted behaviours associated with, experiencing Aboriginal cultural tourism products and services;
- **Certification / Accreditation** – creating formally recognized identification programs that help tour operators and other travel trade organizations identify cultural tourism products that meet industry standards of facility quality, operation, marketing and pricing; and
- **Federal government assistance** – obtaining federal government assistance in protecting Aboriginal cultural tourism groups and communities from the theft of arts, crafts, imagery and other traditional cultural practices. This assistance would be used not only for further

development and promotion, but also to restrict imports of imitation products that harm the preservation and growth of the cultures of Canada.

Support Programs

Participants suggested a wide range of support programs to capitalize on the benefits and address the constraints faced by Aboriginal communities and entrepreneurs. Among their suggestions were programs related to ways the community could prepare were:

- **Community Tourism Development** – conducting tourism awareness programs to inform community members about the benefits and drawbacks of tourism, product development opportunities, visitor expectations, and available technical assistance for initiating tourism development. Other recommended actions included providing community readiness workshops and programs to assist with decisions on what cultural resources might be shared with visitors, informing economic and business development officers on how to most effectively provide tourism support, helping community members learn about their own culture, identifying infrastructure requirements needed for effectively welcoming tourists (e.g., visitor friendly signs etc.);
- **Marketing** – providing marketing training for communities and entrepreneurs that focused on establishing branding and standards programs that considers both community and market needs, encouraging partnership developments and related tour packages, creating cooperative marketing programs, and identifying funding sources to support marketing programs. These funds would be used for Internet marketing, publication of regional tourism calendars, maps, guidebooks, and greater integration with provincial and regional tourism association marketing programs. Particular interest was expressed in programs that promoted cost effective cooperative marketing partnerships between regional tourism groups and entrepreneurs. The need for appropriateness and ‘current-ness’ of Aboriginal images used in marketing programs was especially important to many session participants;
- **Networking** – providing forums such as symposiums, seminars and conferences that allowed communities and entrepreneurs to come together for sharing, planning and partnership development. Related options for such networking included linking BC Aboriginal tourism businesses into regional and online discussion forums;
- **Training** – delivering learning programs for owner / managers and employees that addressed skills ranging from front-line hospitality and tourism training to business management education linked to strategic planning, accounting, sales, finance, operations and partnership development. The need for business training programs for Aboriginal artists was also identified;
- **Information** – developing and distributing “how to” tool kits and other guides for assisting Aboriginal cultural tourism business development, product development and marketing. These “tool kits” should offer hands-on and practical information concerning marketing research, case studies and best practices. Access to the “tool-kit” information could be provided via regional resource centres and a central website;
- **Human Resources** – developing programs that generate interest in tourism careers. Include programs that focus on practical skill development that include internships and mentorships, which complement formal training initiatives, provide skills specific to Aboriginal tourism needs (such as Aboriginal heritage interpretation), and help to strengthen the provincial Aboriginal tourism association. Developing and distributing inventories of existing human resource support programs and how to access them was recommended; and

- **Financial** – providing programs that offer greater access to equity capital, loan funds and operating funds for new and expanding tourism businesses. In addition, a need was expressed to establish shorter funding review processes and adopting approval criteria that meet with tourism industry cycles. Funding is also required for marketing activities, especially related to advertising and tradeshow participation. Developing and distributing inventories of existing funding programs and how to access them was recommended.

Supporting Organizations and Partners

Session participants identified several organizations and groups that they felt should be involved in decisions concerning Aboriginal cultural tourism development. These included First Nations governance and business development agencies, First Nation Cultural Keepers, friendship centres, and other community development related committees. In addition, they felt that other non-Aboriginal developmental and tourism agencies should be linked with Aboriginal tourism planners and businesses. These included regional tourism associations, festivals and event organizations, educational institutions and other training groups, provincial and federal government agencies (including Canadian Consulates), municipal and regional governments, as well as other non-governmental and private sector environmental, movie and resort industry organizations.

4. Tour Operator Consultations

During the period of March to April 2004, a series of telephone interviews were undertaken with domestic and international tour operators selling travel to British Columbia. The interviews were conducted to provide an industry perspective concerning issues and opportunities important to the development of the Aboriginal cultural tourism in British Columbia. This section presents key findings of these interviews.

4.1 Overview

In total, 34 tour operators were interviewed (see **Appendix E: Tour Operator Interview Participants** for a list of tour operators surveyed). Their combined business volumes provide over 50,000 travellers from Canada, the US, Great Britain, Germany, Switzerland, Australia, New Zealand, Japan and Mexico to British Columbia.

The tour operators were selected based on the type of business they operated and the client base they serviced. The tour operators interviewed represented: receptive tour businesses servicing multiple markets with group and independent travel experiences, or selling direct to the public via the Internet and / or with brochures; tour operations that sell to travel agents and other tour operators; and niche tour businesses specialized in offering nature viewing, learning vacations, cultural travel and adventure products.

Each interview took approximately one hour to complete and was pre-booked in advance. During the interview process, the tour operators were asked about: the characteristics of their market and clients; how they developed and marketed new products; what challenges and opportunities they experienced related to offering Aboriginal cultural tourism experiences; their interest in developing new Aboriginal cultural tourism experiences; and key market trends and issues affecting their ability to develop new Aboriginal cultural tourism experiences. (Interview questions are listed in **Appendix F: Tour Operator Survey**).

4.2 Key Findings

Based on the comments received from the tour operators, several overriding and common perspectives concerning Aboriginal cultural tourism development and the industry emerged. These views were related more specifically to: market perceptions; competitiveness; emerging trends; product opportunities and weaknesses; resources required to improve marketing and development; and issues and challenges that will dictate further Aboriginal cultural tourism development opportunities. These perspectives are summarized in the following sections.

4.2.1 Market Perceptions

Depending on the markets, there were different levels of understanding and interest in pursuing Aboriginal cultural tourism experiences.

The German and Swiss tour operators were the most knowledgeable and interested in learning about Aboriginal cultural tourism experiences. They were also the most willing to promote longer duration experiences as well as travel to more remote locations for such experiences. They also commented that there might be a language barrier for some of their clients.

The UK tour market was more focused on mainstream travel experiences. The tour operators interviewed felt that the market did not seek such products because they were generally less aware of

what comprised a Canadian Aboriginal experience. They felt that UK visitors generally associated Aboriginal culture in North America with Native American experiences in the western US and other Indigenous groups in Australia and New Zealand.

The Australia and New Zealand tour operators expressed a moderate level of interest in such opportunities in BC. They commented that their market had an appreciation for Aboriginal culture since it was so apparent in their own countries.

Tour operators that worked with the Japanese market were interested in Aboriginal experiences as long as they were of short duration and close to key city centres that their tours visited. Translation services would be required for all interpretation provided by Aboriginal guides. Aboriginal experiences would be of interest to the young adult market. In particular, special interest travellers would be interested in Aboriginal cultural experiences – such as tasting Aboriginal seafood (e.g., salmon or Oolican grease or roe on kelp), and viewing food harvesting and preparation processes, as well as participating in wildlife / nature viewing, and art appreciation experiences. They felt that the Japanese market would be more likely to participate in a program specifically focused on one theme and would travel to destinations such as the Queen Charlotte Islands and the North Coast for these experiences.

US and Canadian tour market operators varied in their responses. Those operators handling mainstream clients were the least interested in Aboriginal experiences and felt that their clients would have little or no interest in such experiences. They felt that their US clients either had no awareness that BC had a ‘native’ culture or that the ‘native’ experience in Canada was similar to what was already available to them at home. The operators indicated that they would consider including a visit to an Aboriginal museum, cultural centre or a food experience or a dance performance in their packages. However, this would only be as an add-on to their mainstream itineraries. Conversely, tour operators that focused on wilderness, adventure or cultural-related learning programs were more interested in Aboriginal cultural tourism experiences and were willing to travel to remote locations for such opportunities. They were also looking for more hands-on, interactive and authentic interpretative experiences.

A comment made by many tour operators was that Canada and BC were not destinations that they would not immediately associate with Aboriginal cultural tourism experiences. In fact, they frequently commented that they were more apt to associate the word ‘Aboriginal’ with Australia and New Zealand travel opportunities. They used the term ‘Native Americans’ in the US and were unclear of what an Aboriginal community or tourism experience was in Canada. One of the tour operators commented that a clear ‘translation’ or definition of what comprised Aboriginal cultural tourism experiences as well as examples of such travel opportunities was needed for market positioning purposes. They also felt that such experiences should be profiled to a greater extent in the media, so that potential consumers would become more aware of the benefits of pursuing such products.

Tour operators also frequently mentioned that there were virtually unaware of any exceptional examples of Aboriginal cultural tourism product development in Canada. Only three Aboriginal sites in Canada were mentioned with any regularity: Turtle Island in Ottawa, ON, and the K’san Village and Quw’ustun’ Cultural Centre in BC. As for other existing products, they were unaware of how to find them or whether they existed. When ATBC was mentioned as a resource for finding such experiences, several tour operators asked for information about the Association’s website and other access addresses.

4.2.2 Competitive Destinations

While the tour operators did not necessarily sell other competitive Aboriginal destinations, Australia and New Zealand were often mentioned as places where excellent examples of Aboriginal cultural tourism opportunities existed. They did associate Australia and New Zealand with quality Aboriginal tourism experiences and if they were to promote these destinations they would consider including Aboriginal tourism experiences in the itineraries. One tour operator commented that “Aboriginal tourism has been over-developed in Australia and travellers are ‘more savvy’ and sophisticated about the experiences they want and what they classed as ‘tacky’.”

Alaska was also mentioned as a destination that has a variety of Aboriginal tourism experiences. Those that promoted cruise travel said that there were some experiences in Alaska, such as the Native Cultural Centre in Anchorage and a few shore excursions that incorporated Aboriginal cultural experiences. It was suggested that these products might be good models for BC to review, as they were considered suited to the US market. Other US destinations such as Montana, South Dakota, Arizona and Utah were mentioned as competitive locations they would think of when looking for Aboriginal tourism experience to include in their packages. Most US tour operators mentioned that if a client asked for a native tourism experience, they would automatically think of the US west rather than Canada.

4.2.3 Emerging Trends

All of the tour operators interviewed agreed that new travel trends were reshaping their products. These trends included:

- vacations becoming shorter, with weekend getaways growing in popularity;
- cultural experiences growing in demand (e.g., art, food, entertainment activities in which visitors interact with residents and experience various aspects of their local cultures);
- authentic interpretation of local attractions and products increasing in importance;
- interactive and hands-on ‘live it, instead of watch it’ experiences becoming more popular;
- high quality guided interpretation of local cultures and communities being sought; and
- experiences designed for independent travellers increasing in popularity.

These changes in travel preferences have created increased market interest in Aboriginal cultural experiences related to:

- guided and interpreted nature-based activities (e.g., wildlife viewing tours);
- cultural heritage (e.g., learning about traditions, legends / mythology);
- cultural appreciation (e.g., purchasing arts / handicrafts); and
- cultural lifestyles (e.g., attending community festivals, food harvesting and production events).

A majority of the tour operators interested in Aboriginal tourism commented that though there is a growing demand for experiencing Aboriginal cultures, the Aboriginal element should be an enhancement to the experience rather than its primary focus in order to cater to a larger audience. They felt that such experiences should be incorporated into mainstream tours as unique complements to existing tourists. For instance, instead of creating new wildlife viewing, nature or guided

adventures, existing programs could be enhanced with Aboriginal interpretation and cultural insights into such activities.

4.2.4 Product

Of the tour operators interviewed, 73% said that they currently promoted Aboriginal tourism experiences in Canada within their programs. In some cases, the examples that they provided were not Aboriginal-owned businesses (e.g., Capilano Suspension Bridge and the Museum of Anthropology). Additionally, when asked about the use of Aboriginal-owned hotels, most responded that they did not work with any. However, once prompted with examples of Aboriginal-owned hotels such as the Best Western Tin Wis in Tofino, and the Quaaout Lodge in Chase, they responded that they used or at least knew of these operations and would consider using them in the future.

Exhibit 4.1 provides insight into the Aboriginal tourism experiences currently offered by the tour operators interviewed. The extent to which they incorporate these products and services into their packages (e.g., duration and price points) is also provided.

Exhibit 4.1: Package Inclusions, Duration and Pricing 2004 (percent)

Package Inclusions	Percentage of Respondents
Museums / Attractions	65%
Interpretive Programs	54%
Adventures and Nature Viewing	46%
First Nations Owned and Operated Hotels	42%
Meals	42%
Other	12%
Duration	Percentage of Respondents
Less than two hours	50%
Half Day	15%
Full Day	10%
Two Days	5%
Three or more Days	20%
Pricing	Percentage of Respondents
\$0-\$50	35%
\$51-\$100	18%
Over \$100	24%

New Product Development Opportunities. Though 73% of the tour operators currently offered Aboriginal experiences in Canada, 90% of them indicated that they would consider offering / expanding their Aboriginal tourism portfolios in Canada. Additionally, almost all of them (94%) said they would be prepared to offer more than one Aboriginal tourism experience within their packages. These responses suggest a positive attitude towards incorporating future Aboriginal tourism product offerings.

When asked about new product development opportunities, most tour operators commented that such experiences should be located either on or near traditional touring routes in the province or in key urban centres. Some of the more adventurous tour operators were willing to go further to supply such experiences, but commented that access to these product offerings would have to be relatively easy and not too expensive.

Destinations of Interest. When tour operators were asked about where in BC they would be interested in incorporating Aboriginal tourism products into their packages, the following destinations were mentioned.

- Queen Charlotte Islands
- North Coast
- Northern BC
- Prince Rupert
- Kamloops
- Chase
- Skeena Region
- Cariboo Region
- Vancouver Island (Tofino, Duncan, Alert Bay, Victoria, Clayoquot Sound, Pacific Rim, Quadra Island)
- Day excursions from Vancouver

In some cases, these destinations were mentioned because the tour operators were aware that Aboriginal tourism products existed in these locations. As well, most of these destinations are along many of the commonly promoted touring routes thereby making access to such products and services relatively straightforward.

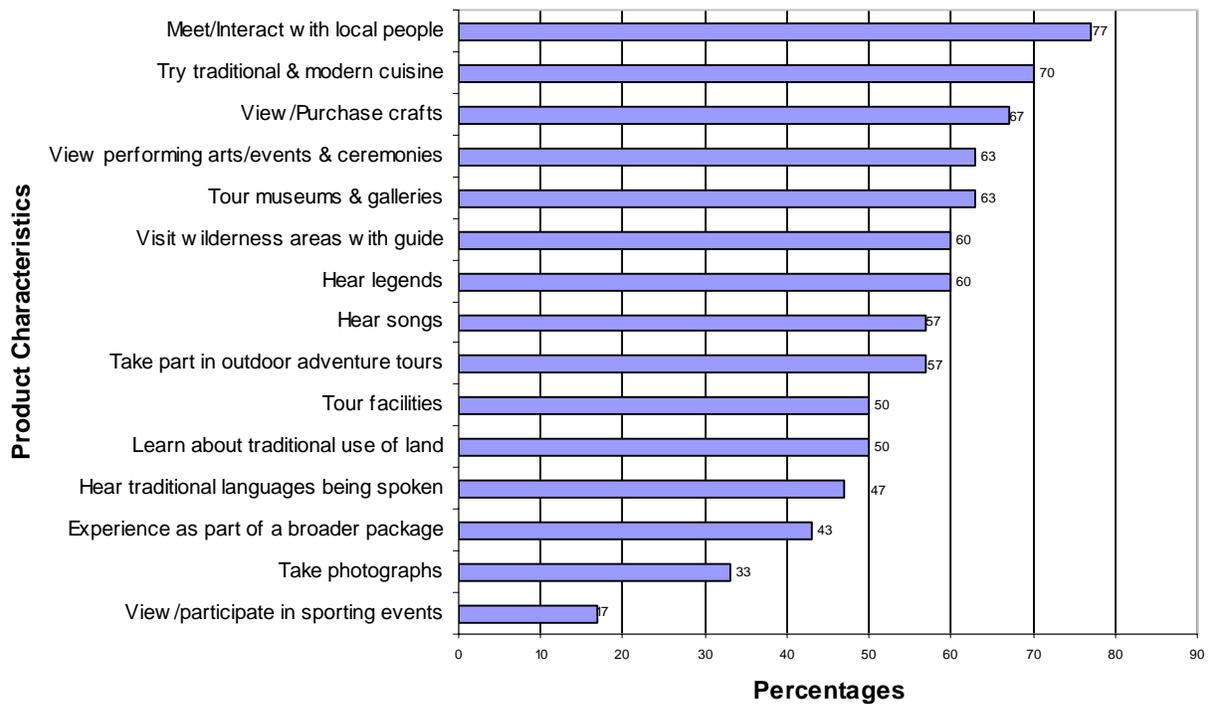
Products of Interest. Tour operators suggested examples of several product types that would be particularly suited to their operations. They were as follows:

- **Australia** – Outback Experience at Tjapukai Aboriginal Park near Cairns;
- **New Zealand** – Tamaki Maori Village;
- **US** – Monument Valley Trading Post & Lodge, Tatanka Interpretive Centre in the Black Hills of South Dakota; and
- **Canada** – Turtle Island near Ottawa; U’Mista Cultural Centre in Alert Bay; K’san Village near Hazelton, Head-Smashed-In Buffalo Jump in Alberta; Dog sledding with First Nations interpretation in Churchill; excursions at Tofino; village tours to Ma-Mook; Quw’utsun’ Cultural Centre in Duncan; and visits to the Siksika Nation Reserve, Alberta.

The tour operators selling mainstream tours felt that though their clients were not necessarily looking to ‘learn’ about Aboriginal culture, opportunities for ‘hands-on’ or interactive experiences would elevate the overall enjoyment of such tours. This perspective applied to clients participating in group tours as well as pre-packaged independent itineraries.

Exhibit 4.2 provides a summary of the product characteristics identified as being important or very important to the tour operators’ clients:

Exhibit 4.2: Product Characteristics and Client Preferences 2004 (percent)



A variety of experiences, including specifically named Aboriginal tourism experiences, were mentioned as being of interest to many of the tour operators in the future:

- Aboriginal site visit and tour
- Bear viewing with Aboriginal interpretation
- Berry tea ceremonial dance
- Galleries / Art Centres / Interpretive Centres with hands-on programs
- Native cuisine
- Canoe tour with lunch
- Cariboo art program
- Dreamcatcher making and basket weaving with Elders
- Small group and adventure travel
- Aboriginal songs, storytelling and dance in authentic setting Meeting with the locals in their villages
- U’Mista Cultural Centre
- Short presentations on traditions and customs
- Home-hosted dinners with the locals
- Kayaking, canoeing and village visit with meal in Clayoquot Sound with Tla-oook Cultural Adventures
- Family-orientated programs
- Experiences in remote settings that have easy access
- Quaaout Lodge
- Tsa-Kwa-Luten Lodge
- Overnights in traditional accommodation (longhouse / teepees)
- Nature walks with interpretation
- Meeting and conversations

Pricing. The following price ranges were mentioned as being acceptable to the tour operators:

Exhibit 4.3: Pricing for Future Product 2004 (percent)

Experience Duration	\$0-\$25	\$26-\$50	\$51-\$75	\$76-\$100	\$101+
Less than 2 hours	33%	67%	0%	0%	0%
Half day	14%	29%	43%	14%	0%
Full day	17%	0%	17%	50%	17%

Based on tour operator input and utilizing their most frequently preferred price points as a starting point, some guidelines for the pricing of Aboriginal tourism experiences were developed. They are as follows:

- 2 Hours or less: \$26 to \$50 per person
- Half Day: \$51 to \$75 per person
- Full Day: \$76 to \$100 per person

Experience Duration

- **Day Experiences:** 47% of the tour operators were interested in programs that were 4 hours or less in duration. Another 28% of them were interested in full day programs.
- **Packages with Accommodation:** 25% of the tour operators expressed an interest in Aboriginal themed packages featuring hotels, lodges, cabins, inns, and traditional facilities (longhouse, tepee, pit house).
 - 31% of these tour operators said that they would only include a one-night accommodation component, and would be most interested if the accommodation was the experience rather than just a place to sleep (i.e. themed or traditional facility, possibly with dinner / performance).
 - 69% of these tour operators felt that a stay of two nights would be acceptable. Such stays would need to be combined with a full day activity program on the second day to justify the stay.
 - No tour operators were interested in stays extending longer than 2 nights.

Tour Planning

Significant lead time is required in order for tour operators to incorporate new products and services into their travel programs. The typical planning lead times required by tour operators surveyed are presented in **Exhibit 4.4**. Overall, receptive and European tour operators require the longest lead time, while those working with North American and Asia Pacific markets tended to plan less than 12 months in advance. Planning for summer products generally requires a longer lead time than that needed for winter product planning activities.

Exhibit 4.4: Average Lead Time for Planning Summer and Winter Programs 2004

Summer Lead Time	Percentage of Respondents
Less than 9 months	29%
9-12 months	21%
More than 12 Months	50%
Winter Lead Time	Percentage of Respondents
Less than 9 months	33%
9-12 months	29%
More than 12 Months	38%

4.2.5 Marketing and Development Resources

4.2.5.1 Information and Assistance Required to Develop Aboriginal Tourism

As important as it is to understand the planning cycle of tour operators, it is equally important to appreciate the resources used by tour operators to plan their programs. **Exhibit 4.5** provides a review of resources used by tour operators in developing their annual product plans.

Exhibit 4.5: Resources Used to Develop New Products 2004

Resource Options	Percentage of Respondents Using Resources
Market Place Tradeshows	81%
Supplier Websites	70%
TBC In-Market and BC Based Staff	63%
CTC In-market Staff	59%
CTC / TBC / DMO Websites	59%
Receptive Tour Operators	56%
TBC Marketing Materials	48%
Other	33%

Tourism British Columbia and many of the province’s Regional Tourism Associations and Destination Marketing Organizations (DMO) attend travel trade marketplaces and have websites with links to many other market ready suppliers in their regions (See Appendix J for market ready standards). Additionally, TBC has staff in international locations and in British Columbia, and it offers product information on its website and in other marketing directories and catalogues. Tourism British Columbia also spends considerable time developing relationships with receptive tour operators and other Canadian Tourism Commission staff situated in key international market locations and in Ottawa and now Vancouver.

While many market ready Aboriginal tourism operators do have websites, their offerings are not well known by tour operators. There is a disconnect in the information flow between tour operators and available Aboriginal cultural tourism suppliers. Tour operators expressed limited ability to find information about British Columbia Aboriginal cultural tourism products.

The tour operators also offered several suggestions regarding initiatives that would encourage them to incorporate Aboriginal cultural tourism products into their portfolios. These initiatives were as follows:

4.2.5.2 Certification / Approval

Develop an association or certification organization that can:

- assure tour operators of high quality product operation standards;
- ensure products are market ready; and
- provide references from other tour operators concerning the quality and reliability of existing Aboriginal cultural tourism products and services.

4.2.5.3 Marketing and Business Development

Implement marketing and business development initiatives that:

- ensure that in-market and BC based sales staff of TBC have first hand knowledge of available Aboriginal cultural tourism experiences, and can respond to inquiries as well as develop opportunities to jointly market these products and services in partnership with in-market tour operators;
- ensure that the Canadian Tourism Commission (CTC) staff in international offices are educated concerning Aboriginal cultural tourism products in BC;
- acquire assistance from tourism destination marketing organizations concerning leads on consumers and groups interested in Aboriginal cultural tourism experiences;
- develop a themed reference guide / manual with products promoted by DMO's and / or the Aboriginal cultural tourism industry and which contain clearly laid out information suited to supporting group and independent travel planning;
- develop co-op partnerships with TBC and / or the Aboriginal cultural tourism industry for marketing programs that include tour operators as financial partners;
- establish in-market product training and familiarization trips for tour operators;
- partner with the cruise industry to create awareness of BC's Aboriginal cultural tourism products and culture;
- gain DMO assistance in providing information on Aboriginal cultural tourism suppliers to tour operators;
- provide a strong image gallery of Aboriginal tourism images (brochure quality) to help promote and position Aboriginal cultural tourism products and services by tour operators;
- create an Aboriginal Cultural Tourism Passport which provides discounts on admissions to Aboriginal cultural tourism experiences – this is most suited to the independent travellers who have greater flexibility to visit multiple facilities;
- ensure that established inbound / receptive operators carry BC Aboriginal cultural tourism products in their portfolios, and also include such products in group and independent traveller itineraries;
- provide funding to tour operators for the development of Aboriginal products and marketing partnerships (it is costly to develop brochures and niche products take a long time to provide a return on investment);
- conduct media relations activities promoting Aboriginal cultural tourism experiences;

- create a website where all approved Aboriginal cultural tourism suppliers can be found. It should provide information pertinent to tour operators, travel agents and consumers, downloadable images for brochures, maps, copy, etc.;
- partner with Alberta tour operators to create multi-destination themed Aboriginal itineraries that can be promoted to consumers;
- create Japan focused consumer awareness programs concerning Aboriginal cultural tourism experiences available in BC (food, culture, art) through media, tour operators and possibly at Expo 2005; and
- host a conference focussing on increasing tour operators' awareness of Aboriginal cultural tourism experiences.

4.2.6 Issues and Challenges

A consistent challenge mentioned by tour operators was how to find and book market ready Aboriginal cultural tourism experiences that they could trust and have a professional working relationship with. A common suggestion was that the Province needed to develop or partner with an organization that could act as a central place where tour operators could find and book market ready Aboriginal cultural tourism experiences. These experiences would be ones that had been approved by the Province or had been visited and approved by an entity that they could trust (e.g., Regional Tourism Association), and which could provide good references from other tour operators. The tour operators said that simply listing Aboriginal products and services on such websites was not enough; they needed the endorsements and recommendations of others in order for them to feel comfortable with the product.

The tour operators indicated that the need for a trusted source of approval was due to the poor track records of some Aboriginal tourism product suppliers in providing consistent quality and service. Other comments of tour operators concerning challenges experienced in working with Aboriginal tourism suppliers included:

- finding it more difficult to partner with First Nations in Canada compared to working with other Indigenous cultures;
- discovering that many Aboriginal suppliers do not have the sophistication of dealing with tour operators;
- learning that small Aboriginal tourism suppliers were not always good at communicating within an acceptable time period;
- discovering that new Aboriginal suppliers frequently went out of business quickly because they did not understand the business;
- determining that many Aboriginal entrepreneurs had unrealistic performance goals with respect to the operation of their businesses;
- discovering that many attractions or programs operate on a short season and therefore are not able to accommodate shoulder season groups;
- finding that there are often language barriers between the visitor and the Aboriginal suppliers when dealing with the international market. As well, there is often a lack of knowledge on the supplier's part about the cultural traits and sensitivities of the international visitor;
- finding it difficult to contact Aboriginal tourism suppliers, especially during the off-season when tour operators are making their bookings;

- learning that many Aboriginal suppliers do not respond quickly enough to inquiries and bookings. This means that tour operators cannot effectively sell Aboriginal tourism products, because most clients will not wait longer than a day for a response from a supplier;
- discovering that many Aboriginal suppliers do not offer their programs frequently enough to be featured products in tours;
- finding that most Aboriginal tourism products and services are not market ready and lack consistency in delivery;
- learning that many Aboriginal suppliers do not necessarily want to be involved in tourism;
- determining that many Aboriginal suppliers do business differently from their non-Aboriginal counterparts, thereby making it difficult for tour operators to develop alliances;
- establishing that partnerships between Aboriginal and non-Aboriginal businesses in the community would help ensure greater stability in the operation of tour programs; and
- deciding that small Aboriginal suppliers / operators should partner with established suppliers who have a distribution system in place so that the booking process is easier for all parties.

Tour operators mentioned several requirements that suppliers must meet if they are to work with tour operators on a long term basis. These requirements, which apply to Aboriginal as well as non-Aboriginal supplier partners, are to:

- be able to provide at least \$1-2 million in liability insurance;
- be able to provide positive business references from DMOs or other tour operators and / or be a member of a recognized tourism organization that can provide an appropriate supportive reference;
- be prepared to pay a commission of 20% on multi-day tours and at least 10% on day activities, or offer net rates;
- be prepared to have group rates and understand how to work with groups (capacity / service); and
- be able to provide good quality visual images of products for brochure and website use by the tour operators.

Some tour operators mentioned that payment of commissions was not always necessary. For example, if the experience was unique and there was no commission paid, the tour operator would be willing to accept a net rate price. Tour operators specializing in wildlife viewing, adventure and cultural interpretation programs provided this perspective.

4.3 Conclusions

It is encouraging to see the growing interest of tour operators in Aboriginal cultural tourism and an increasing desire to incorporate Aboriginal experiences in their tours. However, a common concern expressed by tour operators is whether Aboriginal tourism suppliers have the ability to consistently deliver quality experiences. Additionally, the tour operators interviewed have limited awareness of what an Aboriginal experience is, which suppliers are market ready, and how to book Aboriginal experiences. These are all issues that have to be addressed as a part of the Aboriginal Cultural Tourism Blueprint Strategy for BC.

Invaluable guidelines for future tour product development have emerged from the tour operator interviews. The operators have provided guidance concerning the product types, durations, prices and locations desired by the visitor. They have also helped to identify the best Aboriginal product development opportunities for British Columbia. In addition, they have suggested incorporating Aboriginal elements into existing tour products. This strategy represents a subtle method of gradually adding value to the tour operators' normal product lines while at the same time creating business opportunities for Aboriginal tourism operators.

The following are experiences that were suggested as Aboriginal tourism experiences of interest in the future for the tour operators:

- traditional meals, dance, song and storytelling;
- overnight experiences in traditional Aboriginal accommodation;
- cultural centres, museums and galleries with interpretive and hands-on activities;
- visits to Aboriginal villages to meet with Elders and listen to stories;
- small group, adventure travel and family travel led by Aboriginal guides;
- arts and crafts experiences – viewing and participating in carving, basket making, making dream catchers, etc; and
- nature and wildlife viewing experiences in remote natural surroundings led by Aboriginal guides.

The following activities were identified as methods for stimulating increased tour operator sales:

- develop a unique brand and image for BC's Aboriginal cultural tourism experience;
- be consistent with the terminology used to describe Aboriginal cultural tourism so that the market is presented with a consistent message;
- implement media relations activities that stimulate awareness of Aboriginal cultural tourism experiences available in BC;
- develop an image library of quality Aboriginal images for use by tour operators;
- in partnership with TBC, develop a marketing cooperative which represents certified / approved Aboriginal cultural tourism suppliers and has a website with links to the suppliers websites;
- participate in marketplaces with TBC;
- create product training and familiarization tours for tour operators and in-market TBC and CTC staff, as well as regional tourism associations;
- develop in-market sales activities handled by TBC and CTC staff;
- incorporate Aboriginal cultural tourism experiences into TBC's international advertising and marketing brochures;
- develop a certification / approval process and a brand for approved Aboriginal cultural tourism products and services that can be used by tour operators and their suppliers in marketing activities; and
- establish a booking service and an inbound tour operation which specializes in Aboriginal tourism experiences.

Tour operators are important partners for the development and distribution of BC's Aboriginal cultural tourism product. They are one of the primary means for promoting and selling Aboriginal cultural tourism experiences in domestic and international markets. The Blueprint Strategy must therefore take a multi-faceted approach to developing and nurturing relationships with tour operators so that the overall Aboriginal cultural tourism industry can grow.

5. Aboriginal Cultural Tourism Product-Market Match Opportunities

This section provides the findings of the Aboriginal tourism product–market assessment. It describes the fit between what BC’s travel markets are seeking in terms of Aboriginal cultural tourism experiences and what Aboriginal tourism suppliers currently provide. From a demand perspective, it is based on market data derived from secondary analyses of existing travel market studies, the British Columbia Aboriginal Cultural Tourism Consumer Market Surveys (2003), as well as survey information collected from tour operators catering to the BC travel market. The assessment of the compatibility of the existing and future supply options with market preferences and Aboriginal community values is based on information collected via the Aboriginal Tourism Product Survey (2003), as well as perspectives provided by Aboriginal community members via focus groups, open house sessions, and surveys conducted in regional centres across the province in 2004.

5.1 Market Opportunity Profiles

Travellers interested in pursuing Aboriginal tourism activities on future British Columbia trips are especially interested in incorporating cultural elements into their travel experiences. For the most part, they see these Aboriginal cultural experiences as being integral components of much broader touring trips.

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.

Six distinct but complementary Aboriginal cultural product markets are particularly apparent.

- Aboriginal Heritage Market
- Aboriginal Events and Festivals Market
- Aboriginal Cuisine Market
- Aboriginal Nature-Based Market
- Aboriginal Arts and Handicraft Culture Market
- Aboriginal Sport Culture Market

5.1.1 Aboriginal Heritage Market

The Aboriginal heritage market is comprised of travellers who stated that it was somewhat or very important to them to have opportunities to visit Aboriginal museums and art galleries, or authentic Aboriginal facilities on future trips to British Columbia. This product-market group represents about 87% of BC’s potential Aboriginal travel market. Consumer satisfaction with opportunities to experience BC Aboriginal heritage products was comparable to the importance they attached to having such products available to them (**Exhibit 5.1**).

A total of 34 (or 31%) of all Aboriginal tourism products identified in this study's product survey were heritage attractions. In combination, these heritage ventures represented the largest group of Aboriginal tourism products in British Columbia. Ownership of these ventures is often that of the representing body of the Aboriginal community expressing the heritage displayed and operated as a non-profit society. A cultural advisor or committee is also a common component of these attractions. Their location is within the traditional territory of the culture, which is most commonly in rural and remote BC locations (e.g., K'san in Hazelton, X:aytem at Mission, U'mista at Alert Bay and Q'wutzun at Duncan) making access to the visitor and travel trade a geographic barrier.

First Nations' development of these centres is often driven by economic, as well as cultural and social reasons. The centres offer additional benefits to First Nations that supersede those of tourism. In particular, they serve to increase awareness of and interest in cultural preservation by providing a vehicle by which each Nation can: promote the preservation of their languages and culture; provide a place for youth to gain pride; offer places where area residents can learn about Indigenous cultures and heritages; and improve the relationships between Aboriginal and non-Aboriginal people. However, the cost of developing these centres, as well as the on-going investment in support programs needed to operate these attractions has been a barrier to the development of many of these facilities. This situation exists despite the high priority many First Nations have placed on having these centres.

Demand by the travel trade for Aboriginal heritage tourism experiences that offer opportunities to visit museums, art galleries and interpretive centres was ranked relatively high by tour operators participating in this study. About 63% stated that tours of museums, interpretive centres and art galleries were important elements in their programs. Tour operators consistently indicated that their clients would more positively receive the cultural and heritage facilities when authentic, hands-on experiences, themed and educational programs were offered. It was felt that travellers interested in Aboriginal heritage experiences were more demanding and would want more of a learning component in their visits to Aboriginal areas. Activities most often mentioned as important to positive heritage experiences included: meeting Elders and / or local residents; experiencing authentic song and dance; and participating in ceremonial shows and traditional dinners. Australia, Arizona, New Mexico, Montana, South Dakota, the Queen Charlotte Islands, Africa and Northern Canada were mentioned as destinations with high quality heritage experiences. In Canada, Turtle Island near Ottawa, Ontario and K'san Village near Hazelton, British Columbia were mentioned several times as being good examples of Aboriginal heritage tourism products.

Overall, a strong product-market match exists between the Aboriginal heritage product market and existing opportunities in British Columbia. Future product development options that would help to further strengthen the product-market match include providing: community based galleries, museums and cultural interpretation centres with interactive programming; archaeological site displays and demonstration programs; community tours; themed bed and breakfast accommodation; and healing retreat centres.

5.1.2 Aboriginal Events and Festivals Market

The Aboriginal events / festival market is comprised of travellers who stated that it was somewhat or very important to them to view Aboriginal performing arts, events and ceremonies on future trips to BC. This product-market group represents about 80% of BC's potential Aboriginal travel market. Consumer satisfaction with opportunities to experience Aboriginal events / festival products was much lower than the importance they attached to having such products available to them (**Exhibit 5.1**).

Aboriginal events and festivals comprised 22 (or 20%) of all Aboriginal tourism operations examined in this study. These events are held in many rural and remote communities across the province,

especially around National Aboriginal Day (June 21). Marketing and general public awareness programs promoting these events are low. In many cases, potentially interested visitors are unaware that these festivals are available for public attendance. As a result, the majority of attendees are Aboriginal visitors.

Events and festivals offer Aboriginal community's opportunities to gather, share and promote their cultures. For artisans and craftspeople, they also provide important sales venues. On a grander scale, they can help Aboriginal communities enter the tourism industry with little risk or investment in infrastructure or human resources. Through such events, Aboriginal communities are able to maintain high levels of control over the organization and operation of such activities, while exploring the benefits and costs of tourism. Many communities have discovered that their participation in mainstream events also enables them to promote their culture and other business initiatives.

Aboriginal events and festivals were considered to be an important tour element for about 63% of the tour operators interviewed. Their interest in such events extended to Aboriginal programs that included opportunities to experience traditional dance, music and food... often offered in Aboriginal communities. For mainstream tour operators, it was essential for the location of the event / festival to be in close proximity to major touring routes. They indicated that they would not divert their tours more than an hour from existing routes to participate in such events.

Overall, a strong product-market match exists between the Aboriginal event / festival product market and existing opportunities in British Columbia. Future product development options that would help strengthen the product market match include pow-wows, themed community festivals, craft sales, music festivals, expanded National Aboriginal Day celebrations and sporting events.

5.1.3 Aboriginal Cuisine Market

The Aboriginal cuisine market is comprised of travellers who stated that it was somewhat or very important for them to have opportunities to try traditional or modern Aboriginal cuisines during future trips to BC. This product-market group represents about 74% of BC's potential Aboriginal travel market. Consumer satisfaction with their opportunities to experience BC Aboriginal cuisine products was much lower than the importance they attached to having such products available to them (**Exhibit 5.1**).

Few opportunities exist in BC for visitors to experience Aboriginal cuisine. Only 16 (or 15%) of all Aboriginal tourism ventures surveyed reported offering Aboriginal food or beverage products. In addition, existing food establishments offering Aboriginal cuisine had limited menu selection. In rural and remote communities, traditional foods are commonly offered at feasts and complemented with modern foods. However, these foods are not available to tourists on a consistent basis.

Numerous challenges are associated with the provision of Aboriginal cuisine for travellers. Many non-domestic meats are not commercially available, while supplies of traditional herbs and vegetables are often only seasonally accessible; knowledge of traditional food preparation techniques is limited; and few Aboriginal personnel have the skills needed to prepare traditional foods or even 'fuse' traditional foods with modern recipes and ingredients. Currently initiatives are underway to promote greater Aboriginal involvement in non-timber forest harvesting and natural plant management, as well as agri-tourism. The production of traditional jams, jellies, teas, coffees, wines, packaged salmon and salad dressings, plus cookbooks are some of the products being produced.

In addition, there are long standing institutional challenges to using Aboriginal foods in a commercial tourism context. The challenges constraining the supply of Aboriginal cuisine experiences include: food marketing organizations limiting opportunities for Aboriginal suppliers of egg, milk, chicken and fruit to provide new produce for markets; existing fish and game industry groups inhibiting

Aboriginal fisheries groups from fully participating in the supply of some traditional food supplies; and existing land use allocations that limit access of Aboriginal people to the land and resources needed to grow and harvest traditional food crops.

Despite these challenges, providing Aboriginal cuisine to tourists was a preferred product opportunity for many tour operators. About 70% of them were interested in having their clients experience traditional cuisine prepared by Aboriginal people in traditional settings. Salmon was the most commonly suggested menu selection. In addition to meals, there was an interest in Aboriginal suppliers providing traditional snacks such as bannock, seaweed, and soapberries. In addition these operators felt opportunities to incorporate traditional foods into other products and service experiences would be popular additives to their tours (e.g., watching a berry tea ceremonial dance, enjoying a traditional lunch as part of a canoe tour, etc.). Importantly, the food was perceived to be an ingredient in a broader overall Aboriginal cultural experience. For mainstream tour operators, it was essential that the location of such cuisine experience be along major touring corridors.

Overall, a poor product-market match exists between the Aboriginal cuisine product market and existing opportunities in British Columbia. Future product development options that would help to improve the product market match include restaurants (various types), traditional feast events, Aboriginal catering, food gathering tours, herbology tours, packaged foods / gifts, agri-tourism ranch visits, cuisine retail products (cookbooks), and the integration of Aboriginal cuisine into mainstream menu selections.

5.1.4 Aboriginal Nature-Based Market

The Aboriginal nature-based market is comprised of travellers who stated that it was somewhat or very important to them to have opportunities to take part in outdoor adventure or visit pristine wilderness areas with Aboriginal guides during future trips to BC. This product-market group represents about 71% of BC's potential Aboriginal travel market. Consumers' satisfaction with their opportunities to experience Aboriginal nature-based products was much lower than the importance they attached to having such products available to them (**Exhibit 5.1**).

Of the Aboriginal tourism ventures that participated in this study, 31 (or 28%) were providing nature-based products. These operations were more commonly found in rural communities and had a high level of individual Aboriginal ownership.

The provision of nature-based activities is an appealing product line for Aboriginal people. Such products reflect Aboriginal values and practices associated with the land and resource use. They also promote youth interest in land and resource management careers. However, cultural, institutional and risk concerns act as deterrents to such developments. Aboriginal communities have expressed cultural concerns over approving projects such as nature-based products, which involve access to traditional backcountry cultural areas. From an institutional perspective, on-going treaty negotiations make both short and long term access to required backcountry spaces, licenses and tenures difficult to obtain. From a risk management perspective, nature-based products that involve higher risk activities (especially water based) must obtain appropriate levels of liability insurance. In many cases these costs are prohibitive for potential Aboriginal tourism suppliers to establish a nature-based business.

The tour operators interviewed showed substantial interest in incorporating Aboriginal nature-based products into their portfolios. Overall, 70% of the tour operators were interested in featuring the following types of soft adventure experiences: nature walks in wilderness areas with Aboriginal guides; opportunities to learn about existing flora, fauna from Aboriginal experts; and hear nature-based legends and myths from Elders in First Nations communities. Mainstream tour operators were

interested in such products and experiences as long as they occurred in close proximity to existing tour routes. About 57% of the tour operators indicated that they would feature nature-based tours led by Aboriginal guides. They felt that such authentic interpretations would add significant value to their tours if access to such products were easily accessible.

Overall, a poor product-market match exists between the Aboriginal Nature-Based Product Market and existing opportunities in British Columbia. Future development options to strengthen the cultural component of the nature-based product market include providing: sport fishing and hunting tours; backcountry accommodation development (e.g., lodges, eco-lodges, campgrounds (RV, wilderness, National, Provincial, Forest Service); nature tours (e.g., flora and fauna viewing, hut to hut,); water based tours (kayaking, canoeing, white water); and wilderness trails (hiking, x-country, biking).

5.1.5 Aboriginal Arts and Handicraft Culture Market

The Aboriginal craft culture market is comprised of travellers who stated that it was somewhat or very important to them to have opportunities to view / purchase authentic Aboriginal crafts and handiwork during future trips to BC. This product-market group represents about 69% of BC's potential. Consumers' satisfaction with their opportunities to experience Aboriginal Craft products was comparable to the importance they attached to having such products available to them (**Exhibit 5.1**).

BC has the largest number of Bands and First Nations in all of Canada, enabling it to promote a diversity of unique and rich of cultures and languages. These Bands have a large number of Aboriginal artisans and craft producers; however, the systematic distribution of their products is limited. Aboriginal retailers of hand made or manufactured Aboriginal goods are few and often located outside of key visitor and tour route areas. As well, some of these retail outlets are contained within Aboriginal-owned accommodation and attractions. The majority of current retailers are non-Aboriginal owned. Moreover, they also sell products that are mass-produced by non-Aboriginal peoples and / or the products are not produced in ways that reflect the cultural integrity of the cultures they represent. Some retailers report that they do this because of the inconsistent availability of authentic supply. Conversely, Aboriginal artisans and craftspeople protest about inequitable pricing methods demanded by the retailers. For example, they feel that retailers do not pay the producer enough for items, when product mark-ups are double or triple what the producer receives. Producers also express that consumer knowledge of authentic products is low and that not enough effort is made to ensure that the value of credible authentic products is promoted to consumers. They believe that this situation contributes substantially to the growth of 'fake' Aboriginal cultural products.

While this study did not specifically inventory Aboriginal artisan and craft operations, their numbers are understood to be high. Producers often operate from their home. They typically participate in Aboriginal coordinated craft sales, tradeshow and other events, many of which may not be promoted to tourists.

Aboriginal community coordination (e.g., inventory of suppliers, community artist walks, bulk purchasing, artist co-ops, craft and carving demonstrations) and support of this sector (e.g., training, pricing and manufacturing) could contribute to a stronger and better-recognized industry. These strategies would help the artists and craftspeople enjoy greater rewards from their labour, and help them to enhance their business skills. They would also help to clearly identify those authentic cultural products that contribute to sustaining that culture from those that are non-Aboriginal produced. Coordination amongst artisan ventures could also produce economic benefits to those communities where economic opportunities are few. Additional infrastructure requirements are minimal for such home-based producers.

Of the tour operators interviewed, 68% felt it was important for their clients to be able to view and / or purchase authentic Aboriginal crafts and handiwork such as carvings, paintings, clothing, baskets and jewellery. Many were interested in introducing hands-on craft making experiences to their tours through such activities as making dream catchers, weaving baskets and learning to carve. Others wished to incorporate crafts demonstrations into the tours they offered.

Overall, a limited product-market match exists between the Aboriginal Craft Culture Product Market and existing opportunities in British Columbia. Future product development options include crafting workshop centres with resident Aboriginal crafters, art gallery / craft shops, and home based arts / craft tour routes and packages.

5.1.6 Aboriginal Sport Culture Market

The Aboriginal sport culture market is comprised of travellers who stated that it was somewhat or very important to them to have opportunities to view or take part in Aboriginal sporting events during future trips to BC. This product-market group represents about 39% of BC's potential Aboriginal travel market. Consumers' satisfaction with their opportunities to experience Aboriginal sport culture products in BC was low compared to the importance they attached to having such options available to them (**Exhibit 5.1**).

Similar to the events / festivals product segment, many Aboriginal sport culture events are known only to the Aboriginal community. Aboriginal people represent the majority of spectators at canoe competitions, the North American Indigenous Games and other 'modern sports' tournaments (e.g., hockey, basketball, soccer, baseball, rodeos). For instance, the 2002 North American Indigenous Games held in Winnipeg, Manitoba, was the largest gathering of its kind in Canada attracting close to 20,000 Aboriginal people and staging over 3,000 Indigenous performances. An estimated 40,000+ people viewed some part of the Games.³ There will be opportunity however to profile Aboriginal sport culture, through the upcoming 2008 North American Indigenous Games awarded to the Cowichan territory.

Currently, the number of traditional sports cultural events (e.g., bone and toggle games, kayak races, cup and ball events etc.) is low. Pursuit of the creation of events or tournaments featuring these games is often hampered by a lack of knowledge and practice within Aboriginal communities, as well as fear of cultural loss and theft. Increased traditional sport cultural activities could be encouraged by communities working in conjunction with specialized tourism businesses.

Tour operators expressed limited interest in featuring Aboriginal sporting events in their tours. Only about 17% of them felt that this was an important activity to feature and most could not even relate sports to Aboriginal tourism. Most could not envision what an Aboriginal sporting event would be. When prompted they could only recall ever seeing or hearing about Aboriginal sporting events, such as spear throwing, in Australia and New Zealand.

Overall, a very limited product-market match exists between the existing Aboriginal sport culture product market and existing opportunities in British Columbia. Future product development options that would help to fill the current gap include: regional sporting competitions (e.g., provincial and regional tournaments, North American Indigenous Games); traditional cultural games festivals / competitions (e.g., demonstrations, competitions, coaching clinics for sports such as lacrosse, stick ball); rodeos; sport fishing and hunting events; and Hallmark sporting events (e.g., training facilities for world class athletes – World Cups, Olympics, National Championships). A regional partnership

³ North American Indigenous Games, www.virtualmuseum.ca / Exhibitions / Traditions / English / history_games_07.html

for the development and marketing of these events represents a low-risk route to the development of such attractions. However, marketing to a local or regional non-Aboriginal independent traveller could be beneficial.

Exhibit 5.1: Summary Product-Market Match Matrix 2004

Product-Market Characteristics	Aboriginal Tourism Product-Market Segments					
	Heritage Attractions	Events / Festivals	Cuisine	Arts / Handicraft	Nature-Based	Sports Events
Market Characteristics of Independent Traveller*						
Product Market Preference	87%	79%	74%	69%	71%	39%
Very likely to take a BC Aboriginal tourism trip within 3 years	40%	41%	44%	44%	40%	46%
Most Interested Geographic Market	Overseas 34%	Overseas 35%	Overseas 35%	Overseas 34%	Overseas 39%	Overseas 39%
Primary Trip Type	Touring 58%	Touring 58%	Touring 58%	Touring 59%	Touring 58%	Touring 60%
Average Daily Trip Party Expenditure	\$553	\$596	\$525	\$551	\$559	\$677
Recent trip use of generic Aboriginal tourism sites	73%	72%	72%	76%	72%	77%
Average # of Aboriginal trip sites visited	2.3	2.2	2.2	2.3	2.8	2.2
Frequency of "high" perceived satisfaction rating for overall Aboriginal tourism experience	39%	39%	39%	41%	37%	40%
Average importance rating for specific product to future trips	4.4	4.5	4.5(a)	4.4	4.1	4.4
Average satisfaction with specific product experience	4.2	3.5	2.9(b)	4.4	3.1	2.8
Perceived limited availability of Aboriginal experiences	55%	56%	58%	55%	55%	55%
Export ready Product Characteristics						
Product abundance (L, M, H)**	M	L-M	L	H (regional) ⁴	M	L ⁵
Product geographic access (L, M, H)	L	L	L	H	M	L
Reinforcement in other market reports / data bases (L, M, H)	H	H	H	H	H	M
Travel Trade Compatibility						
Presence in current travel trade packages (L, M, H)***	H	L	L	M	M	L
Access to supply for future travel trade package development (L, M, H)	H	M	L	M	M	L
Importance for future travel trade package development (L, M, H)	H	H	H	H	M	L
Comparative advantage of current product compared to competing jurisdictions	M	M	L	H	M	L
Aboriginal Community Compatibility						
Potential compatibility with community values (L, M, H)****	M ⁶	H	H	H	H	H
Potential compatibility with community economic development goals (L, M, H)	M	M	H	H ⁷	H	M
Compatibility with community personnel capacity (L, M, H)	H	H	H	H	M	M
Product Market Match Summary						
Overall importance to BC's potential Aboriginal tourism competitiveness (L, M, H)*****	H	M	M	H	M	L

* Based on data derived from 2003 BC Aboriginal Travel Market Surveys

**Low (L), Medium (M) and High (H) ratings based on BC Product Survey data, key informant interviews and document reviews.

*** Low (L), Medium (M) and High (H) ratings based on travel trade interviews, key informant interviews and document reviews.

⁴ The arts and crafts available do not necessarily reflect the Indigenous cultures of the area – coastal First Nations cultural arts and crafts are the most commonly available item in BC and are often carried in gift stores. Not all First Nations cultures have a strong history of arts and crafts, consequently there is not an abundance of artisans and craft retailers in some communities.

⁵ Many Aboriginal sporting events have not been offered to the general public; few of these sports events are traditional / cultural sports.

⁶ Community value compatibility is influenced by the communities' willingness to share culture, as well as comfort and confidence in their own cultural knowledge.

⁷ Artisans and crafts people are more likely to operate as home-based business; community support can be provided through the provision of retail outlets and branding.

**** Low (L), Medium (M) and High (H) ratings based on community focus groups, workshops, survey data, and document reviews.

***** Low (L), Medium (M) and High (H) ratings based on team assessment of overall compatibility with Aboriginal Strategy goals.

(a) Average importance ratings based on a scale ranging from 1= not important at all, to 5 = very important

(b) Average satisfaction ratings based on a scale ranging from 1= very unsatisfied, to 5 = very satisfied

5.2 Product-Market Match Recommendations

The importance of the Product-Market match analysis is that it provides the foundation to ensure that the Blueprint Strategy takes a market-driven approach to product development. A market-driven approach ensures that strategies for marketing and product development are grounded by consumers and travel influencer's preferences. This approach increases the probability of future success for Aboriginal tourism businesses in British Columbia.

5.2.1 Product Development

Based on the input received during the consumer, tour operator and community consultations, select product-market segments emerged as excellent development opportunities for British Columbia. Not only do they reflect market preferences, but also they match well with the priorities of Aboriginal communities. The top six Aboriginal products that have emerged are based on themes related to:

- heritage attractions;
- events and festivals;
- cuisine;
- arts and handicrafts;
- nature-based activities; and
- sport event tourism, to a lesser extent.

Additionally, during the tour operator interviews, certain destinations / regions were identified as being locations where new product development would be of particular interest. Key to these locations being selected was their proximity to existing visitor travel corridors. The regions in the province where tour operators recommended product development take place are:

- North Coast of British Columbia (e.g., Inside Passage route and Prince Rupert to Prince George);
- Vancouver Island (e.g., Victoria, Duncan, Tofino, Clayoquot Sound, Alert Bay, Quadra Island);
- Kamloops (e.g., Shuswap Lakes region); and
- Vancouver region.

These product development recommendations provide an important focus for Aboriginal product development in British Columbia. They also suggest priority areas for funding by government agencies and entrepreneurs.

Priorities for the development of the six products should occur in three stages. First, efforts should be made to capitalize on opportunities associated with existing market ready product supply. Then emphasis should focus on realizing opportunities associated with products that require refinements prior to being marketed on an extensive basis. Finally, investments should be made to develop new product and market opportunities. The level of overall importance and priority for each of these product development tiers is noted in **Exhibit 5.1**. Other strategic tasks associated with these products are detailed in this section.

- **High Priority** – Since there currently is a strong availability and awareness of Aboriginal Heritage Attractions as well as Arts / Handicraft products, efforts should commence immediately to develop marketing initiatives related to these two product groupings. Such initiatives should focus on creating advertising programs targeting key overseas and North American markets. Developing linkages with the travel trade can be generated by participating in tradeshows such as Canada’s West Marketplace, and organizing targeted fam tours for select tour operators. Programs to identify and brand authentic Aboriginal arts and handicrafts, as well as locations that sell First Nation recognized arts / handicraft producers (i.e. artists, craftspeople, manufacturers) should be established and promoted. This should be started immediately and continue as the primary focus for development for at least the next two (2) years. Activities that help Aboriginal artists and craftspersons enhance needed business skills (e.g., marketing and pricing products) should also be done.
- **Medium Priority** – The next focus for development should centre on nature-based, cuisine, and events / festivals tourism opportunities. These three tourism product lines are considered to be potentially important ingredients for new tour programs, but limited information exists concerning their availability and capacity. For instance, while the supply of potential events / festivals products for inclusion in tour packages is good, there is limited knowledge available concerning access to them by non-Aboriginal visitors. Tasks that should be initiated to improve access to these products include:
 1. promoting opportunities in Aboriginal communities to develop and market these products and experiences as tourism focussed events;
 2. creating an inventory of these products and assessing their relative levels of market readiness;
 3. developing and delivering workshops and mentoring / counselling / advisory services for the managers of those products that are near but not quite market ready; and,
 4. establishing product specific industry networks and government partnerships to encourage and support product development and marketing activities. Examples of potential industry linkages include:
 - i. *Events / Festivals* – Olympic Cultural Olympiad, City of Vancouver Culture Department, Aboriginal Sport Recreation Association of BC, BC Festivals and Events Association, etc.
 - ii. *Cuisine* – Agri-foods Canada, BC Ministry of Agriculture, Fisheries and Foods, First Nations Agriculture Association, National Aboriginal Forestry Association, Native Fishing Association, BC Agri-tourism Alliance, and Cuisine Association of BC.
 - iii. *Nature-Based Activities* – provincial and national sector associations – i.e., BC Wilderness Tourism Association, Guide Outfitters Association of BC, Sport Fishing Institute, National, Provincial, Municipal and Regional parks, Park Reserves, Marine National Conservation Areas, Other Marine Protected areas, etc.
- **Low Priority** – Sports tourism products are of interest to a limited number of tour operators and tourism organizations. However, interest in this area of development will increase as the 2008 Indigenous Games and the 2010 Olympic and Paralympic Winter Games development initiatives unfold. However, it will be very important to carefully select what Aboriginal sporting events to develop to ensure that market interests are fulfilled and First Nations concerns are addressed. Developing a greater knowledge of what Aboriginal sporting events might be of greatest value for the group or independent traveller by tour operators and other

travel trade members is clearly needed. However, those culturally based sporting events that create interest with mass media organizations may generate the best opportunities for highlighting Aboriginal communities.

Exhibit 5.2: Product-Market Match Implementation of Sectors

Task	Sector	Task Target Market	Dev. Tier ¹	Need	Years			
					1	2	3-5	6+
Create and execute a marketing campaign for consumers and the travel trade.	Heritage, Arts and Crafts	Consumers, Travel Trade	3	Marketing	■	■	■	■
Collect information on events and register them in event calendars and market to consumers / travel trade.	Events / Festivals	Consumers, Travel Trade	3	Marketing	■	→	→	→
Create and execute a marketing campaign – ideally this would be melded into the marketing campaigns for Attractions / Arts and Crafts.	Nature-Based, Cuisine, Events / Festivals	Consumers, Travel Trade	3	Marketing	■			→
Include sports events in events / festivals marketing initiatives.	Sports Events, Events / Festivals	Consumers, Travel Trade	3	Marketing		■	→	→
Promote sports events to travel trade and cultural events marketing groups.	Sports Events, Events / Festivals	Travel Trade	3	Marketing	■	→	→	→
Host information sessions and schedule meetings with travel trade to provide information on Aboriginal tourism products.	Heritage, Arts and Crafts, Outdoor, Cuisine, Events / Festivals	Travel Trade	2	Development	■	■	→	→
Host information sessions and schedule meetings with travel trade to provide information on Aboriginal tourism products.	Sports Events	Travel Trade	2	Development	■	■	→	→
Develop information tools on how to coordinate events.	Sports Events	First Nations	1	Awareness & Development		■		
Promote opportunities in sports events to First Nations and encourage their development.	Sports Events	First Nations	1	Awareness			■	→
Encourage development of new Aboriginal Cultural Tourism Experiences	Heritage, Cuisine, Nature-Based, Events / Festivals	First Nations	1	Development			■	→

■=period of action →=ongoing activity

1. Product Development Tier: 1= Undeveloped; 2= Existing but not market ready; 3=Market ready. See section 7.1 for a full description of these product development tiers.

Note: For the emerging sectors listed in the table above, there are existing Aboriginal tourism products in British Columbia that may be market ready, or require some support. The table above, is intended to reflect the sector as a whole, and does not include the existing product experiences that can / should be included in Aboriginal tourism marketing initiatives.

5.2.2 Target Markets

While all of the preceding Aboriginal product-based travel segments share several common characteristics, they also have unique traits that should be incorporated into the future marketing and promotion programs listed in **Exhibit 5.2**.

Appendix H: Aboriginal Product Market Segment Profiles provides a more detailed summary of the pre-trip motivations, trip behaviours, post-trip product satisfaction levels, and future trip attitudes of key potential Aboriginal Tourism segments.

Key geographic travel markets for such travellers are:

Fully Independent Travellers (FIT):

- Primary Markets: 1. BC, 2. Regional North America 3. Long Haul North America.
- Secondary Markets: 1. Germany/Switzerland 2. Australia & New Zealand 3. UK.

Packaged Travel/Tour Operators:

- Primary Markets: 1. Germany/Switzerland 2. Japan 3. Other Asia (Taiwan, China, Hong Kong, South Korea).
- Secondary Markets: 1. Netherlands 2. UK 3. USA and Canada 4. Australia & New Zealand.

6. Vancouver 2010 Olympic and Paralympic Winter Games Opportunities

The 2010 Olympic and Paralympic Winter Games (2010 Winter Games) are comprised of two international sporting and cultural events – the Olympic Winter Games (February 12 to 28, 2010), and the Paralympic Winter Games (March 5 to 14, 2010). In combination, these hallmark events are expected to attract 5,000 athletes and officials, 10,000 media members, 14,000 volunteers, about 2.3 million event spectators, and several million off-site viewers through media activities (television, newspaper, other print and electronic/Internet).

For many British Columbians, the 2010 Winter Games are more than sporting and cultural events. They represent a catalyst for the creation of a decade of related economic and cultural development opportunities. The 2010 Winter Games are viewed as a valued stimulus for the development of BC's capacity to compete on the world stage because they encompass activities ranging from the development of venues for sporting and cultural events, to the delivery of event programs, to the marketing of commercial products and services, to the establishment of on-going winter sport and cultural legacies outlined in the *2010 LegaciesNow*⁸ program. The 2010 Winter Games also provide an opportunity to showcase British Columbia to a worldwide audience.

In addition, strategic activities associated with human resource capacity building, infrastructure and product development, marketing and promotion, as well as partnership creation are expected to generate business, employment, trade and wealth for Aboriginal people and other British Columbians. The Games are also seen as a means to supporting and a catalyst to accelerating the development of many other initiatives and industries related to technology, trade and investment, manufacturing and arts. These opportunities are expected to produce benefits for Aboriginal peoples in the form of jobs, careers, general business, tourism, and especially cultural recognition and preservation.

This section outlines the 2010 Olympic and Paralympic Winter Games related opportunities available to BC Aboriginal communities and entrepreneurs.

6.1 Aboriginal Positioning

The majority of the 2010 Winter Games events will take place in the traditional territory of the Squamish and Lil'Wat First Nations, as well as on the shared lands of the Tsleil-Waututh and the Musqueam First Nations. Unresolved land claims issues in BC⁹ and the legally recognized Aboriginal Rights and Title to lands and resources have helped to gain the commitment that the Vancouver Organizing Committee¹⁰ (VANOC) and all levels of government will actively involve First Nations and Aboriginal people in all aspects of these Games. Further, First Nations protocol dictates that the host Indigenous First Nations (e.g., Squamish and Lil'Wat, as well as Tsleil-Waututh and Musqueam) be the primary contacts and participants in negotiating and securing Aboriginal benefits.

⁸ The *2010 LegaciesNow Society* is a commitment to province-wide sport development that is designed to help put athletes on the podium and leave a lasting legacy for all of BC. The program has three areas of focus: sport development, community capacity building and province-wide community outreach.

⁹ The BC Modern Day Treaty Making Process is a land claims negotiations process involving the British Columbian and Canadian governments and the First Nations governments.

¹⁰ Vancouver Organizing Committee is responsible for Games Operations.

The contributions of the Squamish and Lil'Wat First Nations to the development of the Vancouver Bid Society's submission to host the 2010 Olympic and Paralympic Winter Games were formally recognized by the International Olympic Committee (IOC) Evaluation Commission. Indeed, the participation of these First Nations in the initial Olympic Games Bid Society's activities and their continued participation in the VANOC have formally guaranteed Aboriginal people the opportunity to participate fully in all aspects of planning, promoting, executing and benefiting from these hallmark events. These First Nations were also intensively involved in the Vancouver Olympic Bid Society Human Resources Committee that commissioned a study by Roslyn Kunin & Associates on the 2010 Winter Games impacts on BC's human resources.

These governing First Nations have indicated that they are also committed to ensuring other Aboriginal involvement and enjoyment of benefits. For example, the Aboriginal Sport Recreation Association of BC (ASRABC) enjoys a role in the *2010 LegaciesNow* sports programs endorsed by Squamish and Lil'Wat First Nations.

Immediately following Vancouver's selection as the host city, representatives from the Squamish and Lil'Wat First Nations hosted the first event designed to explore activities and challenges for Aboriginal involvement in opportunities related to the 2010 Winter Games. At that event, participants identified ways for Aboriginal communities and individuals to be involved and provided recommendations on how to make this happen. Since then, the Squamish, Lil'wat, Musqueam and Tsleil-Waututh First Nations have established the 2010 Aboriginal Training Adjustment Committee (ATAC). The committee's mandate is to identify employment opportunities associated with all aspects of the Olympics, including hospitality and tourism, and to develop and implement strategies for all Aboriginal employment. In 2004, the initial focus is on construction opportunities – at present two major private construction companies are part of the ATAC.

This level of engagement and activity by Aboriginal groups are unique and virtually unprecedented to the Olympic movement. In past Olympic Games, the benefits enjoyed by Aboriginal people (Indigenous people) have been few. For example, the participation of Aboriginal people at the Salt Lake City Winter Olympics was limited to cultural performances in the opening ceremonies, and the establishment of an Aboriginal retail and cultural centre at the fringe of Olympic Village activities. Other international and North American sporting events (e.g., Commonwealth Games) have had greater Aboriginal involvement in planning and were studied by the Vancouver Olympic Bid Society and the First Nations in the development of the bid document.

Key to the realization of the anticipated benefits is the quality of the Aboriginal products and services to be available to tourists in Vancouver's Lower Mainland region, Victoria and the Sea-to-Sky corridor¹¹. Aboriginal tourism businesses and attractions in these regions are expected to play a significant role in shaping future market interest in Aboriginal cultural tourism throughout the province. It is essential that the Aboriginal cultural tourism products in this corridor fulfil, and in many ways exceed, visitor expectations and industry market ready standards.

Because of the close watch by the tourism industry and the public, how Aboriginal tourism in the traditional territories of the Squamish and Lil'Wat First Nations is developed, marketed and delivered will be instrumental in shaping pre and post tourism and 2010 Winter Games opportunities in other regions. Failure by any of the Aboriginal tourism ventures to satisfy visitor and industry expectations could substantially reduce the credibility of other existing and future Aboriginal tourism operations and result in loss of business meaning Aboriginal tourism will have to operate in a recovery

¹¹ Sea-to-Sky Corridor is a term for the geographic area between Vancouver and Whistler, BC.

mode for many years. Also, how these First Nations partner in the “ramp-up” and legacy development portions of the 2010 Winter Games will shape the way in which benefits to Aboriginal groups are distributed.

This reality is strategically important to First Nations communities and Aboriginal operators across the province that have indicated an interest in participating in and benefiting from the 2010 Olympic and Paralympic Winter Games spirit and legacies. While Aboriginal expectations for tourism benefits and opportunities are high, the reality of the Games is that they are more a:

- media rather than tourism event;
- sports-driven rather than a tourism event; and
- commercial product sales opportunity rather than a tourism event.

The BC government, the host cities of Vancouver and Whistler, the federal government, and many other agencies involved with making the 2010 Olympic and Paralympic Winter Games a reality have already prepared strategies, drafted programs and made commitments. In many cases, these actions are aimed at maximizing the benefits before and after the completion of the Games. They include commitments to:

- construction of new facilities and infrastructure;
- employment and training;
- name recognition;
- educational programs;
- sports development programs;
- community capacity building;
- health and fitness;
- cultural programs associated with a Cultural Olympiad;
- marketing and promotions activities; and
- artist recognition programs.

These commitments are outlined in Games related strategies for human resources, trade and investment, and tourism, as well as in procurement policies.¹² Many of them have direct implications for Aboriginal cultural tourism development.

6.2 Games Benefits to Aboriginal Tourism

While anticipation is high for the benefits associated with the 2010 Winter Games, First Nation communities do express concern over the potential negative impact the Games may have on the hosting region’s lands and resources, environmental health, and Aboriginal cultural identity (e.g., cultural degradation). Moreover, research specifically on Aboriginal tourism and discussions with First Nations and Aboriginal tourism operators, indicates the Aboriginal tourism industry is not fully capable of managing these impacts and delivering market ready tourism products of the high quality normally associated with Olympic Games or other worldwide sporting events. Further, there are reservations among First Nations with regard to expanding too rapidly into tourism. Substantial

¹² The strategies were released at the May 2004 Winter Olympics Business Opportunities conference.

efforts must be taken to ensure that products and services offered by the Aboriginal cultural tourism industry in conjunction with the 2010 Winter Games are of sufficient quality that they will enhance rather than retard future growth of Aboriginal cultural tourism and First Nation cultures.

Though the concerns are understood, it is also recognized that Aboriginal tourism can benefit greatly from the 2010 Olympic and Paralympic Winter Games. These gains can address some of the shortfalls of the existing industry, which are outlined in the table below.

Exhibit 6.1: Aboriginal Benefits from 2010 Olympic and Paralympic Winter Games

Lack of...	Can benefit from...
<ul style="list-style-type: none">• Consumer and tourism industry knowledge of First Nations cultures and heritage	<ul style="list-style-type: none">• Increased awareness and understanding through cultural events, media relations and hosting activities
<ul style="list-style-type: none">• Understanding of BC Aboriginal cultural tourism as distinguished from other destinations offering Indigenous tourism experiences	<ul style="list-style-type: none">• Differentiating BC from other regions through provision of more information and Aboriginal cultural tourism offerings
<ul style="list-style-type: none">• Awareness of Aboriginal cultural tourism businesses in BC	<ul style="list-style-type: none">• Raising awareness of "authentic products" and certification through marketing and promotional programs that promote authentic Aboriginal cultural tourism

7. Aboriginal Cultural Tourism Development Strategy - Framework

Aboriginal hospitality spans many centuries. The potential to establish a vibrant and sustainable Aboriginal cultural tourism sector in BC is significant even though Aboriginal cultural tourism is an industry in its infancy. A number of the Aboriginal cultural attractions that exist in BC were established several decades ago, their creation often driven by First Nations' desires to ensure the preservation and maintenance of their language and culture. Many of the First Nation representatives who contributed to the development of the Blueprint Strategy expressed the continued need for language and cultural preservation. They have grown to recognize tourism as a means for fulfilling cultural goals, as well as creating many economic and environmental benefits.

Those benefits not only accrue to tourism operators, but also to their communities, to the destination generally, and to Canada in terms of building a more diversified and stronger market presence. The motivation for tourism investment in First Nation communities is often business oriented and focuses on the creation of jobs, employment and entrepreneurial opportunities for Aboriginal peoples. In addition, some Aboriginal people are motivated to become involved in the tourism industry because they see tourism as a tool for language and culture preservation, a vehicle for social development, and a means to getting youth involved in their culture.

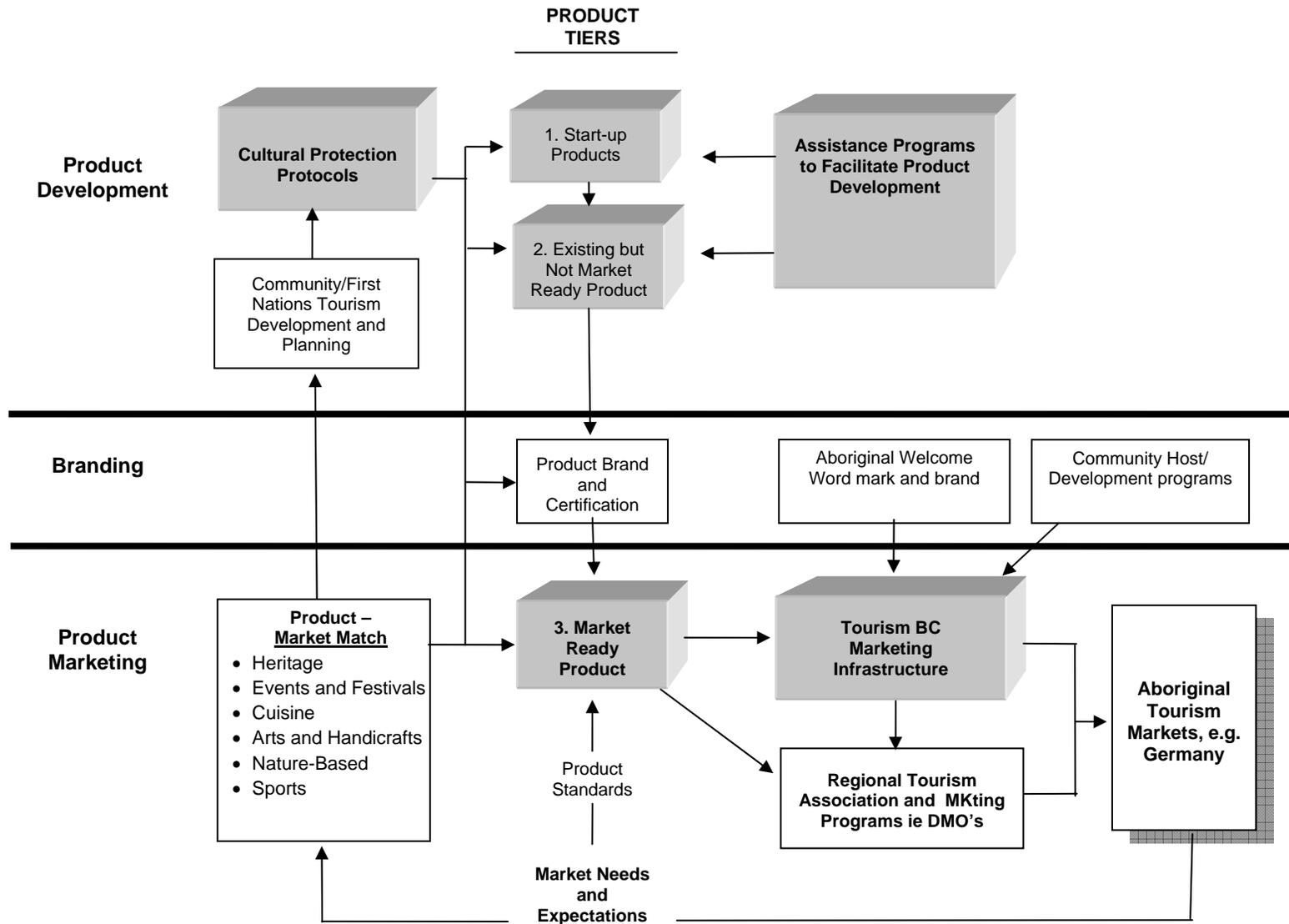
The Aboriginal Cultural Tourism Blueprint Strategy for BC is designed to realize these benefits; the remainder of this section outlines the strategic approach.

7.1 Strategic Framework

As demonstrated in the preceding sections on product assessment and market potential, a diverse array of Aboriginal cultural tourism products exist at varying levels of market readiness. This requires the Aboriginal Cultural Tourism Blueprint Strategy to be responsive to the needs of Aboriginal entrepreneurs already operating a tourism business, those entrepreneurs seeking to establish operations, as well as communities looking to expand their economic development options. The common thread and most pressing concern is that all these tourism businesses will need to have market ready products and services in order to be sustainable operations (see Appendix J for ATBC Market Ready Standards). Therefore, the Aboriginal cultural tourism strategy has to address the needs of business ventures at various stages of development and identify programs that will help them either become market ready or enhance their readiness. **Exhibit 7.1** illustrates the three components of this strategy, which are:

1. **Product development** – involving both cultural protection protocols, community tourism awareness and development programs, and assistance programs to facilitate the development of sustainable and viable Aboriginal cultural tourism operations;
2. **Branding** – at the product level and at the destination level – to ensure market-driven Aboriginal cultural tourism product experiences and enhance awareness of Aboriginal cultural tourism product at the destination level; and
3. **Product marketing** – strengthening marketing for market ready Aboriginal cultural tourism product through enhanced integration with the TBC marketing infrastructure and regional tourism association marketing programs.

Exhibit 7.1: Overview – Aboriginal Cultural Tourism Blueprint Strategy for BC



In this strategy, branding is an overarching solution. It addresses issues related to varying levels of Aboriginal tourism product diversity and quality, limited market awareness, and sceptical travel trade attitudes. The Blueprint Strategy must incorporate the branding of Aboriginal cultural tourism products at the product and destination levels in order to provide a greater degree of product certainty, credibility and awareness for potential consumers and travel trade intermediaries.

The Blueprint Strategy also incorporates a destination word mark program that could be integrated with existing destination regional branding programs. It is not specific to Aboriginal cultural tourism but enables the mainstream tourism industry to reflect and help promote aspects of First Nations' cultures with respect to hospitality. At the product level, a product branding program is recommended that distinguishes Aboriginal cultural tourism products as being certified, authentic, appropriate and respectful of Aboriginal cultures, and market ready – thereby making a 'promise' to the marketplace and its intermediaries concerning Aboriginal cultural tourism products that fulfil the requirements of this brand and giving comfort to First Nations that their culture's integrity will be respected.

Product Development and Marketing. The structure for the tourism strategy involves a combination of branding activities; along with a series of support programs that foster product development throughout interested Aboriginal communities. Illustrated in **Exhibit 7.1**, the product development process for Aboriginal cultural tourism is structured to reflect three general tiers of product development:

- **Tier 1 – Start-Up Businesses / Products** – where tourism businesses and product (including communities) are basically undeveloped but an interest in exploring tourism as an economic development activity exists, or where businesses / products are start-up operations mode;
- **Tier 2 – Operating, But Not Market Ready Businesses / Products** – operating Aboriginal cultural tourism businesses with clear gaps in terms of shortfalls regarding market ready and industry standards, hospitality / service levels, etc.; and
- **Tier 3 – Market Ready Businesses / Products** – tourism products that are market ready and should be fully integrated with destination marketing programs. See Appendix J for ATBC market ready standards.

Within this structure, a variety of support programs and marketing initiatives can be applied to assist tourism operators to increase their business opportunities. In addition, the strategy recommends support programs designed to help communities, businesses and individuals to support their tourism ventures.

7.2 Strategy Vision, Goals and Objectives

The vision for the Aboriginal Cultural Tourism Blueprint Strategy for BC reflects the aspirations of the many stakeholders in the First Nation communities and Aboriginal cultural tourism businesses. The recommended vision is:

“A vibrant and sustainable Aboriginal cultural tourism industry that contributes to Aboriginal community health and well-being, respects First Nations languages and culture, and ensures that the originators of the culture enjoy the benefits from Aboriginal tourism.”

To achieve this vision requires that Aboriginal cultural tourism operations exceed visitor expectations and meet the requirements of the travel trade in a manner that also contributes to the respectful promotion of First Nation languages and culture and the sustainable use of the lands and resources. It also requires that the originators of that Aboriginal culture enjoy the benefits derived from the tourism activities generated.

7.2.1 Goals

Pursuant to this vision, the goals for the Blueprint Strategy are to:

1. provide a sustainable mechanism for Aboriginal communities, individuals and businesses to successfully establish tourism businesses;
2. enhance awareness of the potential for Aboriginal cultural tourism opportunities within all First Nations communities in BC;
3. establish mechanisms for practical program support of existing Aboriginal tourism businesses that are responsive to their needs and that facilitates 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 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 Aboriginal cultural tourism and is useable by all segments of society;
7. increase the number of Aboriginal people in management and tourism careers; and
8. increase the numbers of market ready Aboriginal cultural tourism products.

7.2.2 Objectives for Aboriginal Cultural Tourism

It is recommended that performance objectives be established to help measure progress towards achieving the Blueprint Strategy's overall goals. These targets should be quantifiable benchmarks that provide a sense of the strategy's performance and the Aboriginal cultural tourism industry's contribution to the province's overall tourism economy. Performance targets related to the expenditures of tourists at Aboriginal tourism businesses should be central to the monitoring program.

Data on Aboriginal cultural tourism activity is not currently captured at the level necessary for the purposes of the Blueprint Strategy. Estimates suggested below represent an 'educated guess' to some extent; therefore they should be regarded as preliminary estimates, pending additional research.

A projection of overall direct expenditures by tourists on Aboriginal cultural tourism related activities provides an estimate of the current economic performance of Aboriginal tourism in BC. Future provincial Aboriginal cultural tourism development should build on this base. Overall, visitors who included Aboriginal cultural tourism experiences in their BC travels generated an estimated 1% to 3% (according to Travel Activities and Motivations Survey data) or between about 220,000 and 650,000 of all the province's overnight trips in 2003. These travellers spent an average of about \$144 per person daily and visited Aboriginal cultural tourism sites on three separate days during their trip. Overall, using the lower estimate of overnight trips (220,000) these travellers generated an estimated \$95 million in direct expenditures during the days they visited aboriginal sites. However, not all of these expenditures were related to travel to Aboriginal tourism. On average, visitors indicated that about 34% of their motivation for taking these trips was related to experiencing Aboriginal cultural tourism attractions. Consequently, the overall direct trip spending attributable to Aboriginal cultural tourism in BC appears to be about 34% of the total trip expenditures or \$32 million in 2003. This is probably a conservative estimate.

This estimate provides a sense of the magnitude of direct spending currently generated by Aboriginal cultural tourism in BC. However, it is important to note that not all of these expenditures occurred at Aboriginal sites or in Aboriginal communities. Indeed, the majority of this spending was probably related

to general trip expenditures as opposed to specific Aboriginal cultural tourism activities. Clearly, the implementation of an Aboriginal cultural tourism development strategy would enhance the overall economic benefit of this emerging sector for Aboriginal and non-Aboriginal communities. Aboriginal cultural tourism generates spin-off benefits that profit the tourism industry and BC's overall economy.

This estimate is order of magnitude only. It is recommended that additional research be conducted to establish a financial and economic performance profile of the Aboriginal cultural tourism industry with any precision. This will be a necessary step in order to refine the Blueprint Strategy objectives and the performance measurement system proposed in **Section 7.2.3** below.

The intent of the Blueprint Strategy is to build the Aboriginal cultural tourism industry, enhance its viability, reduce investor risk and provide an economic diversification opportunity for interested First Nation communities and Aboriginal entrepreneurs. Based on current expenditures, expressed latent demand for Aboriginal experiences along with the aggressive marketing and development initiatives proposed in this strategy, it is reasonable to expect significant increases in visitation and direct spending by Aboriginal tourists over the next five years (to 2010). Using the current conservative estimate of visitor expenditures as a base, a performance target of increasing Aboriginal cultural tourism spending to \$52 million over a five year period is recommended. This would represent about a 10% annual compounded growth rate – well above the average for BC's overall tourism industry.

To reflect the goals outlined, objectives to satisfy them are outlined below.

- An increase in the visitor expenditure performance of the Aboriginal cultural tourism sector of 10% per year to about \$50 million in year 5 of strategy implementation.
- The number of Aboriginal market ready Aboriginal businesses will increase by 10% each year by providing training, information and networking activities for existing businesses.
- The number of Aboriginal people participating in certified / accredited training management programs will increase by 20% within three years.

These objectives should be refined at the end of Year 1 of the Blueprint Strategy implementation to reflect the results of the recommended financial and economic impact profile and to establish performance benchmarks for the Aboriginal cultural tourism sector.

7.2.3 Monitoring and Evaluation

The success of the Blueprint Strategy can be measured by monitoring changes in a number of key areas at various time intervals (e.g., annually, biannually) during the next decade. To gauge Aboriginal tourism's progress, consistent reviews of the performance areas should be done. A list of performance indicators specific to measuring the success of this strategy is provided in **Exhibit 7.2** below. In addition to these indicators, there is a range of performance measures that will assist those involved in program implementation to refine, adjust and enhance the effectiveness of program delivery over time. These are provided in **Appendix G: Other Aboriginal Tourism Performance Indicators**.

Exhibit 7.2: Blueprint Strategy Performance Indicators

Performance Area	Tier 1 - New, start-up businesses/ products	Tier 2 - Existing, but not market ready businesses/ products	Tier 3 - Market ready businesses/ products	Data Capture Instruments
A sustainable mechanism to successfully establish Aboriginal tourism businesses.	<ul style="list-style-type: none"> Number of new start-ups 	<ul style="list-style-type: none"> Number of businesses moving into full operation (from start-up situations) Number of businesses moving into market ready status Number of closures Number of existing businesses that are profitable or operating at a loss 	<ul style="list-style-type: none"> Number of newly market ready businesses Number of closures Number of profitable market ready businesses or operating at a loss Estimates of change in profitability of market ready businesses 	<ul style="list-style-type: none"> Measures include maintenance of Aboriginal tourism business inventories Interviews with program delivery agencies Surveys of Aboriginal business operators
Mechanisms for practical program support of existing Aboriginal tourism businesses to facilitate achieving market ready status.	<ul style="list-style-type: none"> Partnership agreements developed to adapt and/or develop programs for community tourism involvement, new tourism product development Completion of program development 	<ul style="list-style-type: none"> Partnership agreements developed to adapt and/or develop programs business planning, operations and management, technology support, marketing, and financing Completion of program development 	<ul style="list-style-type: none"> Marketing infrastructure agreements developed to integrate market ready Aboriginal product into mainstream marketing programs – TBC and regional programs Implementation of integration agreements Increased business generated through new marketing infrastructure 	<ul style="list-style-type: none"> Telephone surveys of First Nations communities, operators Interviews with program delivery agencies Surveys of Aboriginal business operators
Enhanced awareness of Aboriginal tourism potential in First Nations communities.	<ul style="list-style-type: none"> Implementation of tourism awareness programs in First Nations communities Number of communities involved in Aboriginal tourism Number of start-up businesses in tourism 	<ul style="list-style-type: none"> Changes in First Nations community attitudes towards tourism business Degree to which support from First Nations communities for existing Aboriginal tourism products has increased 	<ul style="list-style-type: none"> Changes in First Nations community attitudes towards tourism business Degree to which support from First Nations communities for existing Aboriginal tourism products has increased 	<ul style="list-style-type: none"> Surveys of communities Surveys of Aboriginal tourism operators
Cultural protection and protocol process developed and established.	<ul style="list-style-type: none"> Cultural protection and protocol process developed in association with First Nations communities Application of cultural protocol process by new, start-up businesses and products 	<ul style="list-style-type: none"> Number of Tier 2 adopting cultural protocols Effectiveness of cultural protocols in clarifying in use of cultural content in tourism product 	<ul style="list-style-type: none"> Number of Tier 3 adopting cultural protocols 	<ul style="list-style-type: none"> Interviews and surveys of communities and First Nations leaders Surveys of Tier 2 and 3 product operators
Aboriginal tourism product brand and certification program.			<ul style="list-style-type: none"> Development of the Aboriginal tourism product brand (incorporating both market-driven standards and cultural protection components) Implementation of the product brand to market ready product Integration of the product brand into BC's marketing infrastructure 	<ul style="list-style-type: none"> Analysis of Aboriginal cultural tourism marketing materials Interviews with BC tourism industry stakeholders.

Performance Area	Tier 1 - New, start-up businesses/ products	Tier 2 - Existing, but not market ready businesses/ products	Tier 3 - Market ready businesses/ products	Data Capture Instruments
Destination word mark for Aboriginal tourism in BC created and implemented.			<ul style="list-style-type: none"> Destination word mark researched, developed and permitted Integration of word mark program into BC's destination positioning Implementation of word mark process in BC's tourism industry 	<ul style="list-style-type: none"> Analysis of marketing materials Interviews with BC tourism industry stakeholders
Increase number of Aboriginal people in management / tourism careers.	<ul style="list-style-type: none"> Number of Aboriginal employees working in new, start-up businesses – seasonal or year-round, full-time or part-time positions Number of Aboriginal people in entry level, front-line, cultural interpretation and management 	<ul style="list-style-type: none"> Number of Aboriginal employees working in Aboriginal tourism businesses – seasonal or year-round, full-time or part-time positions Number of Aboriginal people in entry-level, front-line, cultural interpretation and management 	<ul style="list-style-type: none"> Number of Aboriginal employees working in Aboriginal tourism businesses – seasonal or year-round, full-time or part-time positions Number of Aboriginal people in entry-level, front-line, cultural interpretation and management 	<ul style="list-style-type: none"> Surveys of Aboriginal tourism businesses Surveys of Aboriginal communities
Increased market ready Aboriginal tourism products.			<ul style="list-style-type: none"> Number of new market ready businesses and products Revenue generated by new market ready businesses and products Incremental revenue for existing market ready products 	<ul style="list-style-type: none"> Tracking of new market ready product introductions Quarterly surveys of market ready businesses and products

In addition to the Blueprint Strategy performance measurement system, a financial and economic performance profile is critical to support assessment of the Blueprint Strategy impact on an ongoing basis. The recommended indicators for this are shown below.

Exhibit 7.3: Financial and Economic Performance Indicators

Performance Area	Tier 1 - New, start-up businesses/ products	Tier 2 - Existing, but not market ready businesses/ products	Tier 3 - Market ready businesses/ products	Data Capture Instruments
Financial and Economic Performance Benchmarks	<ul style="list-style-type: none"> Number of communities participating in Aboriginal tourism Number of new, startup tourism products 	<ul style="list-style-type: none"> Number of existing, but not market ready product including financial profile Number of closures Number of existing businesses that are profitable Volume by type of business Customer perception of products 	<ul style="list-style-type: none"> Number of market ready tourism businesses and products including financial profile Number of closures Number of profitable market ready businesses Volume by type of business Customer perception of products Individual daily trip expenditure (in province, on-site) Frequency of Aboriginal as motivator for trip in BC 	<ul style="list-style-type: none"> Maintenance of Aboriginal tourism business inventories Financial profiles of Tier 2 and 3 products Surveys of Aboriginal tourism businesses Visitor surveys Interviews with program delivery agencies

<p>Travel Trade / Tour Operator Involvement</p>			<ul style="list-style-type: none"> • Number of tour operators selling market ready Aboriginal tourism products • Growth in tour operator involvement • Number of customers generated by tour operators • Number of Travel Trade Fam Trips 	<ul style="list-style-type: none"> • Surveys of tour operators • Surveys of Aboriginal cultural tourism businesses
<p>Travel Media</p>	<ul style="list-style-type: none"> • Number and type of articles on Aboriginal cultural tourism, new and start-up products 	<ul style="list-style-type: none"> • Number of travel media articles on existing but not market ready products • Number of Media Fam Trips 	<ul style="list-style-type: none"> • Number of travel media articles on market ready products • Number of Media Fam Trips 	<ul style="list-style-type: none"> • Travel media reviews

7.3 Blueprint 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 for communities, First Nations entrepreneurs and tourism operators. Program development is discussed in section 8.0.

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 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. The 2010 Olympic and Paralympic Winter Games is discussed in section 9.0.

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 (see **Exhibit 7.1**), setting a strong course for future business success and ensuring successful role models to inspire entry of new businesses. The marketing strategy is discussed in section 10.0.

A checklist of how the Aboriginal Cultural Tourism Blueprint Strategy addresses the issues and constraints identified by tourism industry stakeholders is provided in **Appendix K**.

8. Program Development

8.1 Introduction

Several areas within program development must be addressed to implement the strategy and realize the potential of Aboriginal cultural tourism. For the purposes of discussion, they are described under the following headings.

1. Product development framework
2. Branding program
3. Industry Development

Another issue that challenges the marketing of Aboriginal cultural tourism products is its general character. Aboriginal cultural tourism is not currently recognized as a mainstream tourism product and as such requires highly targeted marketing and partnership opportunities to succeed. As well, linkages to travellers seeking cultural dimensions in their experiences are needed. To widen the audience for Aboriginal cultural experiences, Aboriginal businesses must develop products that can be introduced into more mainstream markets via traditional touring itineraries or sightseeing excursions. For integration into markets of nature and adventure enthusiasts, the cultural component might come in the form of an Aboriginal interpretative program. Another opportunity for such integration might occur in the form of physical infrastructures that display cultural features / designs associated with Aboriginal culture (e.g., accommodation, restaurants, museums and attractions) that are located in areas frequented by tourists and the travel trade.

8.1.1 Product Development Framework

The product development framework in this Blueprint Strategy builds on the interests of visitor groups specifically interested in experiencing Aboriginal cultural tourism. It is also organized around three tiers of product (business) development stages incorporated into the strategy, as discussed and illustrated in **Section 7.1**. Recommended strategies for each of the three tiers are outlined in the following paragraphs.

- **Tier 1 - Start-up Products** – Aboriginal cultural tourism suppliers interested in and involved with start-up products and services are primarily concerned with increasing community awareness and support for their initiatives. They are also seeking positive “coaching / mentoring” prior to commencing such ventures. Clients in this group include entrepreneurs, Bands, tribal councils, and Aboriginal development corporations seeking tourism-related business opportunities. Creating awareness of the Blueprint Strategy with these groups and other Aboriginal organizations interested in Aboriginal cultural tourism will increase the probability of new start-ups occurring across the province.
- **Tier 2 - Existing But Not Market Ready Product** – This client group is comprised of business operators and organizations that have existing tourism products that are not currently market ready. They include the owners and managers of new businesses that may have just been started, as well as existing businesses that are interested in expanding or upgrading their products to achieve market ready status. This group may also include community organizations that hope to establish their communities as tourism destinations. Promoting elements of the Blueprint Strategy that encourage market ready products will increase the probability of this client group succeeding in its ventures.

- **Tier 3 - Market Ready Products** – This client group is comprised of tourism businesses that are well established and meet the branding / standards conditions of the proposed Aboriginal cultural tourism product brand. The strategy’s Short Term Marketing Strategy provides a means for market ready Aboriginal cultural tourism products to be integrated into mainstream tourism marketing initiatives. See Appendix J for market ready standards. Note that the strategy does not include non-cultural Aboriginal tourism products, which are or can be promoted through existing marketing programs with TBC, the Canadian Tourism Commission, regional tourism associations and other BC destination marketing organizations.

For Tier 3 products, the Blueprint Strategy recommends the implementation of a product certification process that is guided by both cultural protection protocols (essential for Aboriginal cultural tourism products) and conventional tourism industry market ready standards. ATBC’s Aboriginal cultural tourism definition (**Section 2.1**) outlines the key elements of culturally appropriate Aboriginal tourism experiences and suggests how such experiences can be authenticated. Together, community and market-driven standards provide the guiding principles for establishing branded and market ready Aboriginal cultural tourism experiences. They must meet the following two conditions:

1. the product must be structured to ensure that the appropriate cultural protection mechanisms are in place; and
2. the product must be market ready as defined by industry standards and reflected in the requirements for marketing and promotion of the product by destination management organizations such as TBC.

This two-fold standard for branded Aboriginal cultural tourism products sets the benchmarks for Aboriginal cultural tourism development. The balance between industry and community standards for tourism development is central to the Blueprint Strategy. Key cultural protection guidelines must be recognized by the industry, respected by First Nations, and adhered to by the Aboriginal cultural tourism industry. The underlying requirements for this recognition are illustrated in **Exhibit 8**, and discussed in the following Cultural Protection Protocols section.

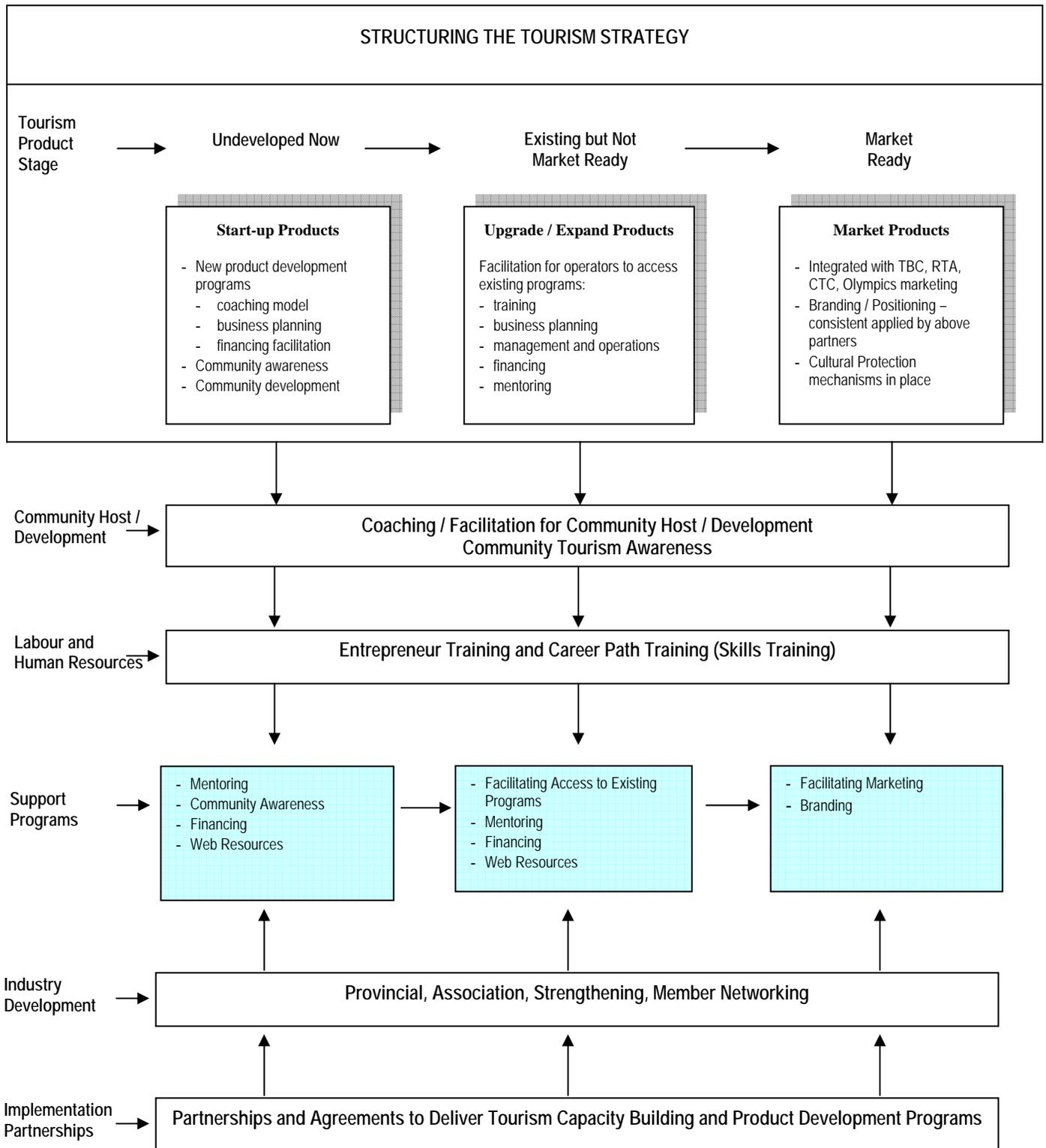
8.1.1.1 Cultural Protection Protocols

Crucial to realizing the vision of a strong and quality Aboriginal cultural tourism industry is the incorporation of mainstream tourism industry guidelines and standards into the Aboriginal cultural tourism product and, most importantly, the recognition and incorporation of Aboriginal cultural protocols. While mainstream guidelines and standards ensure that quality products exist that satisfy industry standards and consumer expectations for the comfort of the mainstream tourism, Aboriginal protocols too would offer comfort to First Nations that their involvement in the tourism industry will produce benefits for the long term good of their communities, and that concerns of cultural theft and ‘commodification’ will be eliminated.

Protocols provide direction on how communication and interaction is to occur. It dictates the ‘language’ of the parties involved outlining how and when they are to communicate with each other, as well as etiquette and acceptable behaviour in that communication. It is especially important on matters of First Nations culture and ceremony, and where Aboriginal Rights and Title exist (e.g., use of traditional lands and resources). The courts legally recognize Aboriginal Rights and Title to lands and resources and dictate how industry must interact and address First Nations rights and concerns. In the past when First Nations protocol has not been practiced, land and resource based initiatives, including tourism, have experienced difficulty in gaining project approval, implementation, operation and expansion.

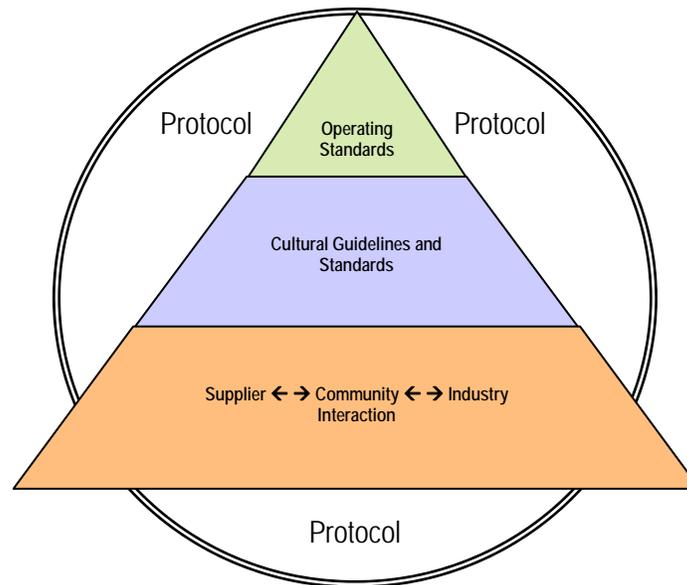
Currently, standards and protocols exist for the mainstream industry; however, they do not exist in the Aboriginal tourism industry for the Aboriginal cultural tourism product.

Exhibit 8.1: Aboriginal Tourism Blueprint Strategy – Three Tiers of Business/Product Development



An all-encompassing approach to standards and protocol development is needed. This approach must address the needs of business operations, culture and community interactions, First Nations requirements for cultural use and recognition, and guidelines for how the non-Aboriginal tourism industry partners interact with First Nations and their communities. The standards dictate the requirements of a “tourism industry accepted Aboriginal cultural tourism recognized product”, while protocol is the way in which these standards will be communicated and recognized. **Exhibit 8.** shows that protocol encompasses all forms and levels of communication in standards, and applies to the Aboriginal and non-Aboriginal tourism industry.

Exhibit 8.2: First Nation and Aboriginal Cultural Tourism Standards and Protocols



Aboriginal community product standards have cultural, operational and environmental sustainability components. The community itself is and can be the only group to define the standards pertaining to cultural use and promotion dictating who can share the culture and ways cultural sharing will evolve. It is necessary that the development of the business operating standards include those requirements set by the mainstream tourism industry. Incorporating mainstream standards gives the standards program credibility in the industry creating confidence in product quality and most importantly, it contributes to assuring the Aboriginal cultural tourism businesses of a foundation of success.

The creation of these cultural standards and of related protocols involves those persons who are recognized by the community to have the cultural knowledge and authority to direct the development of these practices. They are otherwise referred to as “Cultural Keepers”.

These standards outline how cultural practices are administered and how mainstream industry-operating standards will be integrated into those practices.

The following actions to develop protocols and standards are recommended:

1. Communities with standards form a committee that produces tools to promote ways to develop standards and cultural practices for communities without standards;

2. Create information tools that list the steps to developing standards and make them available to communities;
3. Communities should communicate industry operating standards to tourism businesses;
4. Communities should identify ‘Cultural Keepers’ and develop cultural guidelines;
5. Communities and First Nations should develop protocols for Aboriginal-to-Aboriginal communication. It is essential that these protocols be recognized by Aboriginal government and leaders to be accepted; and
6. Groups of communities and First Nations should develop relationships with the tourism industry to outline First Nation-to-Industry agreements that recognize the Aboriginal cultural protocols. These agreements should be formalized in Memorandums of Understanding.

Specific initiatives required for the cultural protection component of these Memorandums of Understanding are recommended:

1. Establish manuals on cultural sharing approaches / protocols;
2. Develop information on cultural product development guidelines;
3. Develop a “Cultural Certification” program template, including guidelines and approval processes which all BC Aboriginal communities can use as the framework for preparing their own ‘cultural certification’ programs for tourism products and services;
4. Develop a provincial brand for culturally certified experiences, which should be used by the Province, Regional Tourism Associations and Aboriginal cultural tourism businesses in all marketing campaigns; and
5. Develop a Cultural Certification process for Aboriginal Guides. This program will provide a marketing edge for Aboriginal businesses that use culturally certified guides and also encourage tour operators to hire certified guides, thereby increasing employment opportunities.

8.1.1.2 Industry Standards

As the tourism sector becomes increasingly competitive worldwide, there is a corresponding increase in the importance of industry standards that ensure that the products offered by destinations meet market needs and expectations. Trends such as the introduction of consumer legislation to protect customers from packages that fall short of expectations and the significant increase in franchising and marketing cooperatives in the last three decades are examples of the movement towards a highly professional tourism industry.

Many destinations are well aware of the social and economic benefits that tourism can generate for their jurisdictions. They are also aware that tourism is one of the world’s largest industries and certainly one of the fastest growing. Therefore, it is important for destinations to maintain and increase their market share. They cannot do so without offering products that are market ready. First Nations entering the tourism industry also require support.

For industry, emphasis should be placed on using market-driven standards. These standards form the basis for decisions by destination management organizations such as TBC when selecting products to market. They include:

- Tourism British Columbia’s own export ready criteria for product standards;
- the Approved Accommodation Guide standards and rating system for accommodation facilities;
- the new agri-tourism standards being developed by the BC Agri-tourism Alliance;
- hospitality standards based on training programs such as TBC’s series of SuperHost® programs (for individuals, businesses, and communities) and the Native Education Centre’s FirstHost;
- facility standards that conform to development control and building permit systems in place in the locations in which the products are offered;
- industry standards for experiences ranging from guided hiking to marine tours – all encompassing safety, equipment, facility (where appropriate) and customer care centres; and
- interpretative guide / program standards for all relevant products (this includes protocol conditions related to cultural protection – for many First Nations these standards will be self-developed).

Implementation of the Blueprint Strategy requires the preparation of a “branding / standards” guideline describing market ready product. This is important for the industry itself in implementing product development programs. It will also be a useful tool to provide the tourism industry and its intermediaries with information on market ready Aboriginal product. In the course of preparing these guidelines, it is important to identify areas where adaptation is required to fulfill existing market-driven standards to reflect the specifics of the Aboriginal cultural tourism situation. The guidelines should also incorporate standards related to cultural protection such as cultural protection protocols.

Strategic initiatives related to developing Aboriginal cultural tourism market ready standards are recommended below.

1. Update the product inventory developed as part of the Blueprint Strategy development process to ensure that all Aboriginal cultural tourism businesses are included in the inventory, whether they are market ready or not.
2. Assess the Aboriginal cultural tourism businesses to determine market readiness, and list the number of businesses in each product development tier (start-up, operating but not market ready, or market ready) of each of the businesses in the inventory. The report should also include recommendations on establishing industry standards for Aboriginal cultural tourism.
3. Establish industry standards for British Columbia Aboriginal cultural tourism businesses, based on the most recent TBC market ready standards and other appropriate standards models; however, these would be adapted to include Aboriginal cultural tourism requirements. The standards program would be influenced by the baseline definition of Aboriginal cultural tourism developed by ATBC (see **Section 2.1**) and the “branding / standards” guideline should include the following:
 - a. criteria that are required to meet the standards;
 - b. guidelines and resources to assist Aboriginal cultural tourism operators to plan and develop their Aboriginal cultural tourism products and services;

- c. guidelines and resources to assist operators to implement the principles of Aboriginal cultural tourism development and to assist them to continually improve performance to satisfy the standards;
 - d. a recognized logo that can be used in marketing materials by those operators that meet the standard; and
 - e. a transparent process for qualifying operators that have met the standard as well as for assessing operators' progress towards meeting the criteria required to achieve the standard.
4. Institute a pilot program to test the industry standards program and guidelines. Based on the pilot testing, modify program as required and prepare a BC wide implementation strategy. The implementation strategy should include:
 - a. Quality assurance monitoring processes for Aboriginal cultural tourism businesses to assist them to continuously improve on their product and customer service. This process would incorporate input from trade, media and consumer audiences;
 - b. A 'Best Practices' program, which encourages Aboriginal cultural tourism businesses to provide the best possible experience to the visitor. This would be a subscription-based program with businesses being reviewed on an annual basis by an outside entity;
 - c. A branding program in which approved 'Best Practices' Aboriginal cultural tourism businesses can promote the performance of their operations in marketing materials; and
 - d. Initiatives to recognize Aboriginal cultural tourism businesses that meet the market standards and those businesses consistently exceed customer expectations (e.g., 'Best Practices' annual awards).

8.1.2 Branding Program

There are two types of branding programs recommended for the Blueprint Strategy – product branding associated with specific products, and destination branding associated with the province of British Columbia. Both have important roles to play in the strategy.

8.1.2.1 Product Branding

Product branding is oriented to tourism businesses where specific products and services are certified as meeting an accepted standard. Product brands are typically associated with market-driven standards and are owned by a designated organization that is charged with “protecting” the brand. The organization establishes a benchmark for market ready status and provides a “brand promise” to the marketplace concerning the standards to which the product adheres. In this case, an Aboriginal cultural tourism organization would be responsible for developing and protecting the brand. The product brand recommended for the Blueprint Strategy is comprised of two components:

1. Cultural protection protocols and mechanisms developed through the cultural protection protocols initiative in the strategy and ensuring cultural integrity and the protection of cultural values as defined by communities and First Nations
2. Market-driven industry standards, building on the TBC standards including export ready criteria, and adapted for Aboriginal cultural tourism product specific to the priority product segments recommended for the Blueprint Strategy.

8.1.2.2 Destination Branding

Destination branding is oriented primarily to enhancing the appeal and market awareness of a destination in targeted marketplaces. It is oriented towards creating a preferred image of the overall destination and applies to all businesses in the region. Destination branding may be available to everyone and, while the destination itself protects brand integrity, it does not have a “membership” component. A business simply becomes associated with the destination itself. An example of destination branding is BC’s “**Super, Natural British Columbia®**” designation managed and owned by TBC. An example of product branding in British Columbia is the “Approved” Accommodation Guide, which identifies approved accommodation available to the marketplace.

The recommended approach to destination branding from an Aboriginal perspective relates to the question of “welcoming” markets to the destination. There are several examples worldwide. For example, Cape Breton uses “CIAD MILE FAILTE”, meaning “One hundred thousand welcomes”. They use this as an awareness brand in marketing, as do Cape Breton operators in their specific sales programs. Another example is the “ALOHA” program of Hawaii, meaning “Hello”. This program has been incorporated as a brand in Hawaii for many years and serves to distinguish the destination and to set a “tone and mood” for visitors.

Tourism British Columbia has a well-established brand that it has developed and strengthened over the last decade. The suggestion here is not to alter that in any way but rather to research, design and implement a program for a welcome “word mark” for Aboriginal cultural tourism that complements it. A welcome word from the Chinook jargon trading language is an example of a potential word mark. The Chinook jargon language is considered to be ‘generic’, meaning it does not belong to any one First Nation. As a result it does not have a specific approval process associated with its use, however, it would be appropriate to gain general acceptance from First Nation, Aboriginal and Métis organizations in BC.

As a generic phrase it does not compromise the cultural integrity of any specific First Nation. This word mark provides a visitor welcome based on historic business activities between First Nations, traders and settlers. Traditionally, it linked the trader with the First Nation and set the stage for their relationship. The Chinook jargon trading language also linked the settler / visitor with the culture of the First Nation, inspiring the visitor to then learn the First Nations language and culture. The Chinook jargon language can again inspire and set the stage for modern day learning about Aboriginal languages and culture and relationship building.

“Kla-how-ya”

This word mark would act as a ‘brand’ and can be used by all tourism industry stakeholders – both Aboriginal and non-Aboriginal. It is suggested that implementation of the Blueprint Strategy include examining integrating an Aboriginal word mark such as “Kla-how-ya” with destination marketing using British Columbia’s “**Super, Natural British Columbia®**” brand promise. The two may be complementary in that “*Kla-how-ya*” is oriented to a welcome to the destination and “**Super, Natural British Columbia®**” is oriented to the character of the destination.

8.1.3 Industry Development

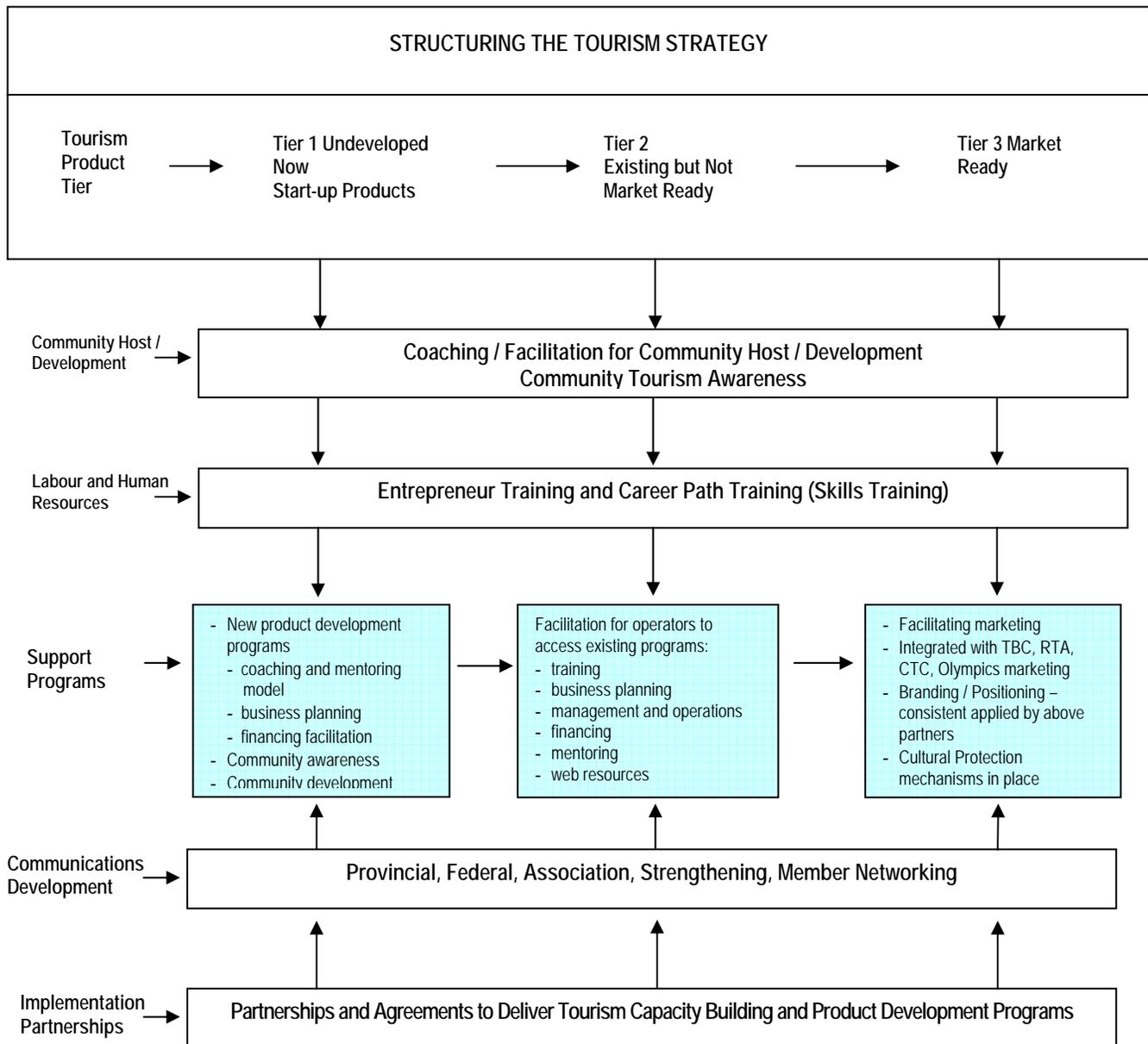
Program delivery incorporates the following key components:

1. Community host / development program – operating particularly at the start-up product tier, but also relevant to all tiers of tourism products (for example, market ready Aboriginal cultural tourism product involving product experiences within communities will require community readiness to host tourism activities);

2. Labour and human resources strategy development and implementation;
3. Support programs for training, Aboriginal cultural tourism product development, and marketing;
4. Communications development; and
5. Partnerships for program delivery.

How these connect with each other is illustrated in **Exhibit 8.3**. The marketing program is detailed in **Section 10.5**

Exhibit 8.3: Program Delivery Framework



8.1.3.1 Community Tourism Host / Development

Visitors, First Nations and tourism officials viewed community readiness and development as a barrier to further Aboriginal tourism development. Factors that visitors considered as deterrents to greater uptake of an Aboriginal cultural tourism experience included: visitors not knowing if they could enter an Aboriginal community and feelings that the community wasn't ready to welcome visitors which, at times, was reflected by poor community development and design aesthetics. Limited community readiness was reflected in features such as: inadequate road and transportation access, degraded facilities, safety and cleanliness issues, limited resident hospitality, and highly visible "No Trespassing" signs at many sites.

For Aboriginal tourism entrepreneurs, the lack of community planning, cumbersome approval processes, limited awareness or understanding of community cultural tourism approval processes, and perceived limited support for entrepreneurship all currently discourage greater participation in Aboriginal cultural tourism business development. To remedy these concerns, a **Community Tourism Host / Development Program** should be created. Its purpose should be to establish tourism friendly First Nation communities that demonstrate cultural and community pride, safety and hospitality and can provide information on how First Nations communities can host visitors and benefit from the opportunities available through tourism and the 2010 Olympic and Paralympic Winter Games. Key aspects of this program are described in **Exhibit 8**.

Implementation of this program would begin with a review of existing "Community Host" type programs (e.g., TBC's Community Host program), and would require the support of the First Nation political leaders, Elders and Elders groups, Youth Groups as well as the involvement of Aboriginal tourism, community planners, economic development officers, and housing officers. The program would be tested first by setting up three communities to pilot it. From their experience, adjustments to the program would be made and then a full rollout of the program province-wide would be done.

Exhibit 8.4: Community Tourism Host / Development Program

Program Area	Description
Awareness	Community tourism awareness – community information sessions and public events on the tourism sector and benefits of tourism.
	Marketing campaign development that includes collateral materials, media and public relations activities.
	Provide information at the community centres on Aboriginal tourism. This information would include research on the market opportunities and segment profiles, funding support, certified training programs, community development plans, and cultural guidelines.
Planning	An assessment of the community's physical environment is conducted to identify areas that require improvements, where basic infrastructure is required (e.g., public washrooms, drinking water, health services, phones).
	Community members identify areas in their community and territory that are open to visitors and that distinguish those areas that are for public, private and no-use. This includes cultural / arts facilities and homes.
	A welcome map is created that identifies areas for tourists to visit, including cultural and artist / craftspeople homes and other facilities. The map lists community and cultural orientation, the First Nation history, and walking trails as well as 'community only' zones.
Training	Cultural training is developed by the community and its 'Cultural Keepers', the program offers a wide array of cultural training including language, arts, land and herbology knowledge, etc.
	A welcome program is created that inspires community offices (especially government), businesses, and citizens to use the First Nation welcome phrase as a greeting for in-person, telephone and writing communications.
	The training program also has everyone in the community build their skills on hospitality, which includes TBC's SuperHost® and Community Host programs, and the Native Education Centre's FirstHost.

Program Area	Description
Physical Infrastructure	Community clean-up program – beautification program that includes landscaping, rubbish removal, garbage cans, fencing.
	Erect welcome and other signs in traditional language at community entrances.
	Welcome banner program (especially for Olympics).
	Construct other facilities and amenities needed for visitors.

8.1.3.2 Labour and Human Resources Development

The community consultations revealed labour shortages to be a significant challenge to development of the tourism industry and the World Tourism Organization reports this to be an international concern. In the Aboriginal community, two labour force characteristics have to be recognized. First, that youth are the largest segment of the population, and second, that the unemployment rates in many Aboriginal communities range from 20% to 90%. Economic and employment opportunities are limited in communities that are rural and especially in those that are in remote areas. Tourism provides a way of creating employment that enables Aboriginal people to apply their geographic, historic and cultural knowledge and skills. While tourism offers a wide array of employment and business opportunities, Aboriginal people are just beginning to embrace them. In BC, the number of Aboriginal tourism businesses is only around 240, with only an estimated 20% being deemed to be market ready, and the participation of Aboriginal people in the tourism labour force is low and insubstantial in management positions.

The purpose of a labour and human resources strategy is two-fold. First it is to improve Aboriginal participation in tourism by encouraging and inspiring individuals to enter the tourism industry, especially Aboriginal tourism, as employees or entrepreneurs. Second, it is to develop the skills of individuals already in the industry for improvement in the positions they already have, and to further develop their skills and knowledge for career advancement. Improving the skills of Aboriginal people will enhance the quality and consistency of the tourism experience and further the reputation of the Aboriginal cultural tourism product.

Two advisory committees should be established – employment / careers, and entrepreneurship. The roles of these committees should be to identify the needs and develop strategies addressing these needs. Human resource development suppliers will play a lead role in promoting careers in tourism, and developing tools that build skills and offer experience in a variety of tourism fields. Representatives from the tourism industry, especially Aboriginal, should participate as advisors. For persons seeking to establish tourism businesses, promotion of tourism business opportunities would be done in strong partnership with tourism and business development agencies (e.g., Aboriginal Business Services Network, Aboriginal Business Canada, etc.).

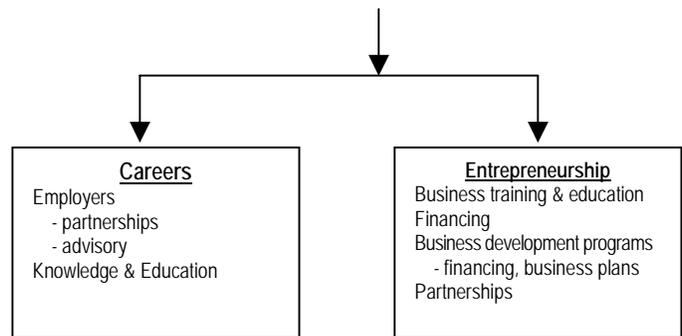
A strategy to encourage Aboriginal involvement in tourism begins with awareness programs. Awareness initiatives involve a combination of public presentations, articles, participation at trade and career shows, and collateral / print materials. Skills and knowledge development tools are workshops, conferences, seminars and courses (non-credit and accredited programs). **Exhibit 8.5** outlines awareness and decision-making stages and their needs at various levels.

The initiatives recommended to carry out the elements listed in **Exhibit 8.5** are listed below.

1. Identify specific labour and skill shortages pertaining to the Aboriginal cultural tourism industry. Investigate how the existing Aboriginal Tourism education programs can implement changes to existing programs or develop new programs to help fill the labour and skill shortages.
2. Establish an Aboriginal Cultural Tourism Advisory Committee (ABTAC) consisting of representatives from First Nations, Aboriginal employment agencies, Aboriginal tourism businesses, educators (e.g., trainers and educational facilities), mainstream tourism training, and government agencies. The advisory committee will build on the 2004 'Building Trust' project that was sponsored by the Ministry of Advanced Education and coordinated by the Native Education Centre, Selkirk College and the Chief Dan George Centre (SFU). The 'Building Trust' project recommended four key priorities including:
 - a. The need to coordinate and strengthen the existing BC Aboriginal Tourism certificate and diploma programs.
 - b. The need to develop more practical, entry-level employment related training in a variety of skill development areas,
 - c. The need to focus more on youth: tourism career awareness and introductory Aboriginal tourism/skills development programs, and
 - d. The need to develop Aboriginal tourism community awareness and leadership training/workshops.
3. Develop employment initiatives with non-Aboriginal partners to provide Aboriginal persons with hospitality and tourism employment and training opportunities. Use the Aboriginal Youth Ambassador Program (in North Vancouver, Squamish and Whistler) as a model to develop other similar programs across British Columbia.
4. Develop awareness workshops that would be offered province wide, and tools that would be available on-line with some being distributed province wide.
5. In partnership with TBC and other relevant agencies, develop regional 'how to' workshops for entrepreneurs that promote new business opportunities and offer skill development. A list of workshops and information needs is included in **Exhibit 8.7**.
6. Work with TBC to adapt their current market ready training programs to suit Aboriginal people and Aboriginal cultural tourism businesses.
7. Use the ABTAC to facilitate the development of new workshops and tools as required.

Exhibit 8.5: Labour and Human Resources Strategy Framework

Stage	EXPLORING	DECISION	MATURE / GROWTH
Industry Status	Not in industry	Entering the industry	Has industry experience / good experience
Needs	<ul style="list-style-type: none"> Awareness 	<ul style="list-style-type: none"> Education Knowledge Skill development Training 	Opportunities awareness for: <ul style="list-style-type: none"> Career advancement Support Mentoring
Marketing Activities	<ul style="list-style-type: none"> Public presentations Articles, editorials Print materials – posters, brochures, flyers Careers shows 	<ul style="list-style-type: none"> Public presentations Articles, editorials Print materials – posters, brochures, flyers Careers shows Employer-student fairs 	<ul style="list-style-type: none"> Career information Funding support Public presentations Articles, editorials
Information Required	<ul style="list-style-type: none"> Benefits Industry information 	<ul style="list-style-type: none"> Educational Training Facilities / Tools Workshops 	<ul style="list-style-type: none"> Emerging opportunities Industry trends Business opportunities
Partnering Agencies	<ul style="list-style-type: none"> First Nations Aboriginal tourism Fed. and Prov. gov't agencies Tourism agencies Canadian Tourism Human Resource Council Council of Tourism Associations Educational facilities Trainers 	<ul style="list-style-type: none"> Bands Human Resources Skills Development Canada Fed. and Prov. gov't agencies Employers TBC 	<ul style="list-style-type: none"> Aboriginal Capital Corporations Banks Aboriginal Business Canada Human Resources Skills Development Canada Aboriginal Business Services Network Fed. and Prov. gov't agencies TBC RTO's / DMO's



8.1.3.3 Support Programs

Structuring the tourism strategy to reflect various tiers of product development enables a more coherent packaging of support programs that are targeted to each product tier. In many cases, programs delivered for one of the product tiers will have application for others. The nature of the support programs recommended for the Blueprint Strategy is illustrated in **Exhibit 8.6**; these will need to be expanded as the first step in the implementation program. In the start-up product tier, the emphasis is on coaching / mentoring and community awareness as well as the provision of information resources for those interested in “getting into” the tourism business. For the existing, non-market ready product tier, coaching / mentoring also plays a role and the emphasis is on facilitating access by these existing businesses to programs that will help them to achieve market ready status. For the market ready product tier, the emphasis is on participating in the Aboriginal

cultural tourism product brand, marketing and promotion programs that will have a direct impact on new business for their operations, as well as market expansion.

Exhibit 8.6: Support Program Initiatives

Support Program	Description
Community Tourism Support	Community tourism awareness (see community tourism host / development program).
	Community tourism development training.
	Coaching program for interested communities.
Business Development	Develop an on-line resource directory of all tourism or business related support organizations, such as training organizations, financial institutions, insurance companies, consulting firms, marketing organizations, tourism specialists, government and municipal organizations which have proven experience in successfully supporting all aspects of business development for British Columbia Aboriginal communities.
	Develop an on-line resource directory of all financial and business development assistance programs available for First Nations, including contact information and procedures for applying.
	Facilitate preferred financing arrangements with institutional lenders, potentially with government guarantees, to assist Aboriginal tourism businesses to start-up or expand.
	Establish a First Nations Tourism Coaching Program, matching established or retired tourism business-owners with new Aboriginal tourism businesses, to guide them through the business start-up process.
	Establish a Mentor Program for tourism enterprises seeking to achieve market ready status.
Training	Adapt current Tourism British Columbia training programs on product development, marketing, business-start-ups and media relations to suit the Aboriginal market.
	Work with educational institutions to enhance existing Aboriginal Guide Training programs with a focus on the 'delivery of the story', incorporating public speaking, how to interact with the visitor, appropriate behaviour and exceeding client expectations.
	Develop a calendar of Aboriginal Guide Training courses to be conducted in Aboriginal communities throughout the province.
Marketing	Co-op marketing initiatives with TBC
	Co-op marketing initiatives with travel trade.
	Co-op marketing initiatives with regional tourism associations and DMOs.
	Participation in CTC initiatives.
	Participation in travel trade, media and consumer initiatives and events.
	Marketing program for product certification branding.

As part of the support programs, information and training needs, several workshops and information and training needs were identified through discussions with the Aboriginal community members and non-Aboriginal tourism industry representatives. **Exhibit 8.7** lists subject areas for workshops / training sessions, print materials and on-line information that respond to the interests and needs identified through those discussions. **Exhibit 8.7** also illustrates what tiers of business and product development match best with these resource materials.

8.1.3.4 Communications Development

Communications development is essential to enhance the capacity of provincial agencies, Aboriginal tourism agencies, and tourism operators to network, exchange views, and mutually support product development and marketing efforts. Communications development will benefit client groups at all tiers of the tourism product development process. Recommended features of the communications development program are listed below.

Creating an Aboriginal tourism resource web portal and resource centre that provides industry news, describes success stories, announces new programs, and provides access to tourism resources and links to programs of partner and other agencies.

1. Sponsoring annual Aboriginal tourism workshops. These events should include “workshop” days for operators / members to access expertise in particular areas (e.g., food and beverage, guiding, accommodation, etc.) in small group sessions to ask questions, exchange views, and network.

2. Improving ATBC profile amongst Aboriginal communities and existing businesses and generate increased membership and buy-in for co-operative marketing programs.
3. Creating an Aboriginal tourism newsletter for both email and hard copy distribution.
4. Establishing a “booking centre” for Aboriginal tourism business in BC that will handle the reservations and financial transactions for consumer, travel agents and tour operators to provincial Aboriginal tourism experiences. This organization could be aligned with “Hello BC” on the consumer side and would be marketed by ATBC and TBC.

Exhibit 8.7: Workshops and Resource Materials Required

Subject Areas	Product Tier			Workshops / Training	Resource Materials	On-Line
	1	2	3			
Aboriginal cultural tourism market ready – standards	✓	✓	✓		✓	✓
Accommodation management and marketing		✓	✓	✓		✓
Attending tradeshows		✓	✓	✓	✓	
Benefits of tourism	✓			✓	✓	✓
Best practices in Aboriginal cultural tourism	✓	✓	✓		✓	✓
Business plan development	✓	✓	✓			✓
Careers in tourism	✓				✓	✓
Community development	✓			✓	✓	
Consumer research	✓	✓	✓		✓	✓
Developing tourism packages		✓		✓		✓
E-marketing for tourism		✓	✓	✓		✓
Environmental management for tourism	✓	✓	✓			✓
Financial management (cash flow)		✓	✓	✓		✓
Hospitality training / customer service excellence	✓	✓		✓		✓
How to develop a circle tour	✓	✓	✓		✓	
How to develop a partnership	✓	✓	✓	✓	✓	
How to develop cultural tourism plans	✓			✓		✓
How to expand – principles of expansion		✓	✓	✓	✓	✓
How to price products	✓	✓		✓		✓
Human resource management		✓	✓	✓		✓
Job standards – Aboriginal heritage interpreter	✓	✓		✓		✓
Job standards – Aboriginal outdoor guide	✓	✓		✓		✓
Legal aspects of tourism (Aboriginal perspective)	✓	✓		✓	✓	
Marketing plan development	✓	✓	✓			✓
Marketing to – consumers		✓	✓	✓	✓	
Marketing to – travel trade		✓	✓	✓	✓	
Mentoring services – the tourism doctor	✓	✓				✓
Operating standards (job positions)	✓	✓	✓	✓	✓	
Planning for a fam tour		✓	✓	✓		✓
The Aboriginal Cultural Tourism Blueprint Strategy for BC	✓			✓	✓	✓
Tourism feasibility assessment	✓	✓	✓		✓	✓
Tourism marketing programs and resources		✓	✓		✓	✓
Training and education programs	✓	✓	✓		✓	✓
Understanding your visitor’s expectations		✓			✓	✓

Tier 1 = Undeveloped Tier 2 = Existing but Not Market Ready Tier 3 = Market Ready

8.1.3.5 Partnerships for Program Delivery

Implementation of the operator support programs and industry development initiatives require partnerships for delivery. The recommended approach to partnerships is through a Memorandum Of Understanding or Contribution Agreement process with appropriate agencies. While there are a variety of potential partners, candidate organizations include those illustrated in **Exhibit 8.8**. Other organizations that Aboriginal tourism initiatives could connect with for partnering in program development, strategic planning and promotion are listed in **Appendix I: Aboriginal Organizations for Tourism**. Ideas for marketing partnerships are provided in **Section 10.5**.

Exhibit 8.8: Illustrative Partnering Organizations and Mandates / Interests for Program Support

Agency	Mandate / Area of Interest
Aboriginal Business Canada	Business development, tourism financing, marketing
British Columbia Ministry of Small Business and Economic Development	Business development programs
Canadian Heritage	Cultural protection and preservation
Council of Tourism Associations	BC's tourism industry development in all tourism sectors; industry development
Human Resources Development Skills Canada	Human resources development and training, workplace placements, education and training
Indian Affairs and Northern Affairs Canada	On-reserve development and registered Indians, marketing
Tourism British Columbia (TBC)	Marketing, Media Relations, Promotions, Product Development guidance
Vancouver Organizing Committee (VANOC)	<i>"Support and promote the development of sport in Canada by planning, organizing, financing and staging the XXI Olympic Winter Games and X Paralympic Games in 2010"</i>
Western Economic Diversification (WD)	Regional development and advocacy initiatives
Western Economic Partnerships Agreements (WEPA)	Funding for project development, marketing, education and training
Parks Canada Agency	Cultural Interpretation and Representation/Ecological Integrity

9. Aboriginal Cultural Tourism 2010 Olympics and Paralympic Winter Games Strategy

9.1 Aboriginal Tourism 2010 Olympic and Paralympic Winter Games Strategy

Section 6 of this document, introduced the 2010 Olympic and Paralympic Winter Games for the Vancouver-Whistler area and identified benefits, challenges and concerns to First Nations and Aboriginal cultural tourism participation. This section provides a recommended approach to ensure that Aboriginal cultural tourism benefit fully from the opportunities anticipated from the Winter Games. Several mobilization activities are required for this approach to be effective; they are listed on the following pages.

First, Aboriginal participation in the 2010 Olympic and Paralympic Winter Games should be guided by an overriding strategic vision – one developed by the host First Nations. A recommendation for the vision of an Aboriginal Tourism 2010 Olympic and Paralympic Winter Games Strategy is to “*create a sustained legacy of Aboriginal benefits – economic, social, cultural and environmental – through tourism involvement in the Winter Games.*” Specific goals related to achieving this vision are:

- maximize awareness and respect for First Nations’ cultures and rights;
- position Aboriginal tourism in the marketplace as an integral part of Canada’s tourism portfolio;
- capitalize on all Games related tourism economic opportunities (development, marketing, management, delivery); and
- accelerate growth and use of Aboriginal cultural tourism products, services and human capacity.

To achieve these goals, diverse Aboriginal involvement led by the host First Nations (i.e., Squamish, Lil’Wat, Tsleil-Waututh and Musqueam) is important. This involvement should be related to establishing and implementing procurement policies, as well as creating Aboriginal partnerships in Games development, marketing and program delivery. We suggest that the underlying factors that should influence the Aboriginal 2010 Olympic and Paralympic Winter Games Strategy should be to:

- improve the quantity and quality of market ready Aboriginal cultural tourism products for pre, event and post 2010 Olympic and Paralympic Winter Games visitor markets;
- enhance the physical capacity of Aboriginal communities to host pre, event and post 2010 Olympic and Paralympic Winter Games visitor markets;
- provide training for human capacity of Aboriginal communities to host pre, event and post 2010 Olympic and Paralympic Winter Games visitor markets;
- ensure the marketing initiatives position First Nations’ culture and heritage, as well as Aboriginal cultural tourism as an integral part of Canada’s tourism experience of pre, event and post 2010 Olympic and Paralympic Winter Games; and
- create and supply 2010 Olympic and Paralympic Winter Games related Aboriginal cultural experiences and products (e.g., tours, festivals, sport competitions, heritage attractions, handicraft / art galleries).

A relationship with the Vancouver Organizing Committee (VANOC) responsible for planning the implementation and operations of the Games is required. The VANOC is responsible for developing plans, garnering resources and support, and ensuring the integrity and fulfilment of the commitments made by the former Vancouver Olympic Games Bid Society.

A four-pronged management approach to guiding this strategy is recommended. **Exhibit 9.1** describes the tasks and identifies the agencies required to plan and execute them.

Exhibit 9.1: Aboriginal Cultural Tourism 2010 Winter Games Strategy

Management Theme	Develop Games related:	Establish Partnerships with:
1. Product Development (e.g., tours, crafts / handiwork, cuisine, accommodation)	<ul style="list-style-type: none"> Jobs related to tours, heritage, cuisine, arts and handicrafts, Procurement policies committed to First Nation cultural integrity for products (goods and services) that are promoted as an Aboriginal product 	<ul style="list-style-type: none"> 2010 Aboriginal Training and Apprenticeships Committee (ATAC) VANOC and Cultural Olympiad Olympic inbound tour operators First Nation communities City of Vancouver and Municipality of Whistler Federal departments – Indian and Northern Affairs Canada (INAC), Western Economic Diversification (WD), Canadian Heritage Provincial departments – Small Business and Economic Development, Olympic Secretariat, Aboriginal Secretariat Circles of Opportunity agreement partners
2. Community Physical Infrastructure Development	<p>Promotion of Aboriginal tourism accommodations, restaurants and other service providers to construction and management companies of Olympic infrastructure in traditional territories</p> <ul style="list-style-type: none"> Olympic venues Transportation corridors, housing Interpretive and information centres as gateways program Attractions (cultural interpretive centres) 	<ul style="list-style-type: none"> First Nations – Aboriginal Training Adjustment Committee Department of Indian Affairs and Northern Development Private sector development companies Government development agencies (e.g., Aboriginal Secretariat) Olympic sponsors Going for Gold Economic Strategy groups
3. Community Capacity Building and Human Resources	<ul style="list-style-type: none"> Tourism awareness programs for communities First Nation community development and hospitality program Customer service training programs Tourism management education programs Sport training and venue management education programs Aboriginal volunteers program Training programs for business management and partnership Tourism career promotion Work with ATAC on developing a hospitality and tourism strategy which would include training and job placement, and promotional activities 	<ul style="list-style-type: none"> Squamish, Lil'Wat and Musqueam First Nations (and other local First Nations whose territories the Games will take place in) Aboriginal Human Resources Development Agreements (AHRDA), 2010 ATAC, Aboriginal Workplace Partnership Initiative (AWPI), Aboriginal Employment Partnership Initiative (AEPI), Aboriginal Business Services Network (ABSN), Aboriginal Careers Training NOW (ACT Now), Métis Human Resource Development Programs: Native Education Centre FirstHost program, Destinations, Go2 TBC (community tourism development workshops, SuperHost®) BC Universities and Colleges Human Resources Services Development Canada (HRSDC) Skills and Legacy project partners Parks Canada for training opportunities and support of Aboriginal Tourism initiatives

Management Theme	Develop Games related:	Establish Partnerships with:
4. Marketing	<ul style="list-style-type: none"> • Branding opportunities • Community signs and names recognition program • Aboriginal Winter Games information website for media and visitors – connected to VANOC and TBC’s Olympic sites • Media packages program • Destination advertising program • Destination “fam” tours • Travel trade catalogues • Destination public relations program 	<ul style="list-style-type: none"> • TBC, Tourism Vancouver, Tourism Whistler • VANOC • Olympic Games sponsors • Cultural Olympiad organizers (City of Vancouver) • Naming and Recognition Project partners • Regional tourism associations • Individual Aboriginal communities

Recommended tasks for fulfilling the goals in this approach are listed in the following points. The implementation schedule for these tasks are listed in **Exhibit 11.2**.

1. **ACTWOW Set Up** – Establish an Aboriginal Cultural Tourism Winter Olympics Working Group (ACTWOW). This Committee should be supported and endorsed by the host First Nations (i.e., Squamish, Lil’Wat, Tsleil-Waututh, Musqueam). The purpose of the ACTWOW is to coordinate initiatives that promote Aboriginal tourism participation in the 2010 Winter Games. Its activities may include developing Aboriginal cultural experiences that could be offered / included in the Cultural Olympiad, establishing corporate sponsorship initiatives, and identifying ways to integrate Aboriginal tourism products in Olympic marketing initiatives. The VANOC would also be involved at this level.

2. **First Nations ACTWOW Approval** – Creation of the ACTWOW requires acceptance by the First Nations. To achieve this, a purpose statement indicating the intent of ACTWOW and its relationships with other Aboriginal tourism groups should be drafted for discussion purposes. The lead First Nations should be approached to determine: if an ACTWOW committee is permissible, how a representative ACTWOW committee might be formed, and what strategic directions and actions it would take.

3. **Committee Development** – A list of potential committee members for ACTWOW should be developed, reviewed and invited. Proposed committee members could be representatives from: the Squamish, Lil’Wat, Tsleil-Waututh, Musqueam First Nations, VANOC, tourism related industry organizations, other Aboriginal development organizations (e.g., First Nations Agriculture Association, Native Fishing Association, First Nations Education Steering Committee), and First Nations Governments / Political organizations (e.g., First Nations Summit, Union of BC Indian Chiefs, Assembly of First Nations and Métis Provincial Council).

4. **Terms of Reference Development** – Once membership approval is gained, more refined terms of reference for the committee and a work plan can be established. Developed under the guidance of ACTWOW, the plan focus is on the following activities:
 - a. Developing and promoting a list of Aboriginal cultural tourism businesses suited to conduct Winter Games related work. The list would identify operators suited to supply to projects related to Winter Games developments, as well as others that can become product and service suppliers for other related activities (i.e., gifts, meeting

- facilities) and sport teams. The list should include cuisine and food suppliers, and Aboriginal cultural performers.
- b. Recognizing the proposed Squamish / Lil'Wat cultural centre as the 'hub' for promoting BC and other Canadian First Nations cultural experiences and tourism information associated with the Games. Planning for this facility is already underway by the Squamish and Lil'Wat First Nations. Based on discussions with these First Nations, ACTWOW could include and promote the Cultural Centre in its marketing initiatives as the lower mainland 'hub' for Aboriginal cultural experiences.
 - c. Connecting Aboriginal cultural cuisine suppliers and caterers with other participating catering companies prior to bid requests from the VANOC. Providing opportunities for the Winter Games visitors to sample Aboriginal cultural cuisine is expected to increase the demand for the product as well as help Aboriginal food suppliers identify markets that need these ingredients/suppliers to prepare this specialty cuisine. Sub-tasks associated with this activity include:
 - i. establishing a partnership with the First Nations agriculture and fisheries industries;
 - ii. meeting with the VANOC to determine timing and process by which food suppliers will be contacted and selected, and to acquire lists of possible suppliers;
 - iii. developing a list of market ready Aboriginal cultural cuisine suppliers and caterers; and
 - iv. determining the most effective method to provide this information to suppliers. Potential methods include direct mailings to major food and catering contractors, or hosting a forum with major contractors and Aboriginal suppliers.
 - d. Ensuring that media relations activities feature and promote the diversity of the First Nations in British Columbia. Such promotion is considered low at this time, and should begin with the Squamish and Lil'Wat First Nations, then Tsleil-Waututh and Musqueam First Nations, followed by the Coast Salish and then other First Nations in BC. It will begin to address the low awareness and understanding raised by operators and the travel trade industry. The stories should feature Aboriginal cultures, values and beliefs and highlight the cultural and tourism experiences offered by First Nations in those regions. In this regard, ACTWOW should:
 - i. work with the VANOC and TBC to develop media stories and facilitate media fam tours; and
 - ii. promote the development of media releases and editorials profiling each First Nation and their Aboriginal cultural tourism products and services should be developed.
 - e. Distributing information on how to acquire permission to use the Olympic and 2010 Olympic and Paralympic Winter Games brand for Aboriginal cultural tourism marketing purposes. ACTWOW should also provide the VANOC with an Aboriginal tourism-branding option that would complement and encourage partnerships with the

2010 Olympic Winter Games brand. This brand could be used for identifying products and services approved by First Nations and recognized by the VANOC. This approach will aid in the advancement of an Aboriginal cultural tourism brand that helps to distinguish authentic and respectful cultural products from imitations, and support the integrity of First Nation cultures.

- f. Obtaining a commitment from the VANOC to establish a procurement policy that ensures that all goods and services having an Aboriginal cultural ‘theme’ will be acquired from suppliers approved by First Nations. VANOC will also ensure appropriate protocols have been developed before purchasing Aboriginal cultural goods and services. This policy should apply to all of VANOC’s procurement activities and helps to address First Nations concerns about tourism promoting misuse and ‘theft’ of cultural images.
- g. Identifying opportunities for Aboriginal people to participate in the **2010 LegaciesNow** program. Currently a relationship linked to sports development programs has been established with the Aboriginal Sport Recreation Association of BC (ASRABC); however, other initiatives are limited at this point. Cultural sporting events is an area where Aboriginal cultural tourism has room to grow. Every effort should be taken to:
 - i. encourage the **2010 LegaciesNow** sport development program to host sports events in Aboriginal communities. Such activities will help encourage visitors to go to regions beyond the Lower Mainland and Sea-to-Sky Corridor Gateways;
 - ii. examine the potential for partnerships between the Aboriginal Sport Recreation Association of BC and Aboriginal tourism, as well as share plans related to Games program development; and
 - iii. develop an Aboriginal component for the **2010 LegaciesNow** education website. This site is targeted to youth and, consequently, offers a way to build knowledge of Aboriginal peoples and their cultures. Establishing a relationship between the First Nations Education Steering Committee (that develops programs for Aboriginal youth) and the website’s content should be established initiatives. This activity helps to address the concern of lack of awareness and understanding of the various First Nation cultures in British Columbia.

10. Aboriginal Cultural Tourism Marketing Strategy

Consumer research found a considerable demand for Aboriginal cultural tourism experiences. However, Aboriginal tourism operators indicated that marketing is one of their greatest challenges. Further, the tourism industry has identified shortfalls in its awareness of the Aboriginal cultural tourism product. The Blueprint Strategy addresses these concerns through a marketing strategy that recognizes the need for different approaches over the short and medium / long terms. A staged approach is key to kick starting and maintaining the momentum of the Blueprint Strategy.

Integral to establishing a sustainable and viable Aboriginal cultural tourism industry in British Columbia, the awareness of the experiences this sector offers must be greatly expanded. The more awareness that is created, the more opportunity is available for new and developing Aboriginal cultural tourism businesses to flourish. The marketing program helps to build the profile and awareness of Aboriginal cultural tourism and the diversity of the First Nations cultures, languages and history in British Columbia, providing additional support and motivation for further product development, investment, and individual entrance in the tourism careers.

Marketing efforts need to target British Columbian residents, as well as visitors from outside of British Columbia. For this to happen, marketing activities that create an awareness of and demand for British Columbia's Aboriginal cultural tourism experiences need to occur before visitors travel to British Columbia, and continue while they are in the province. This awareness needs to be created through strengthening the image of Aboriginal cultural tourism in all elements of TBC's business development, media relations and marketing initiatives, as well as positioning Aboriginal cultural tourism products in other product clusters such as Outdoor and Adventure, Culture and Touring.

ATBC should ensure that the brand and positioning image developed for Aboriginal cultural tourism experiences in British Columbia can be incorporated into marketing initiatives so that First Nations culture and heritage, as well as Aboriginal cultural tourism is viewed as an important part of British Columbia's tourism experience. Customized messages for strategic positioning can then be added to marketing activities for different target groups to ensure that the right message is being presented to the right audience.

British Columbia's regional destination marketing organizations (RDMOs) (or regional tourism associations) should be encouraged to utilize the Aboriginal cultural tourism branding and positioning to ensure that a strong and consistent image of Aboriginal tourism culture in British Columbia is sent out to key markets, and is positioned as a point of differentiation- of British Columbia as a tourism destination. International awareness created through media relations, advertising, tourism publications, websites, e-marketing, promotions and the sales activities of travel trade partners will collectively strengthen the image of Aboriginal cultural tourism experiences in British Columbia, as well as the image of British Columbia within Canada and North America.

In addition to growing the awareness and demand for Aboriginal tourism, it is equally important to make it easier to convert the increased demand into bookings. Thus, information and access to market ready Aboriginal cultural tourism experiences must be made easier for the visitor to acquire (see Appendix J for market ready standards). Expanding distribution channels as well as increasing the availability of market ready experiences is needed. These imperatives can be forwarded by:

- offering business development activities directed at tour operators and special interest / learning travel organizations;
- utilizing the Internet (ATBC and Hello BC websites) and call centre;

- involving Visitor Information Centres;
- providing brochure racking services; and
- working collaboratively with other tourism organizations.

When integrated into broader local, regional and provincial destination marketing programs, this marketing strategy will guide Aboriginal cultural tourism into a positive and productive position. To ensure this integration occurs, it is imperative that Aboriginal cultural tourism is recognized as an important aspect of British Columbia's tourism product in TBC's marketing program and other regional and tourism industry marketing strategies.

The 2010 Olympic and Paralympic Winter Games present the Aboriginal tourism sector in British Columbia with a unique opportunity to accelerate the implementation of the Aboriginal Cultural Tourism Blueprint Strategy for British Columbia. Key to maximizing this opportunity is using the media relation activities associated with, and the Cultural Olympiad of, the Games as a means to promote Aboriginal cultural products and brand images, and to improve the understanding of First Nations by the visitors. Ensuring that Aboriginal culture is incorporated into the image of British Columbia being presented to the world by the Canadian Tourism Commission, Tourism British Columbia, Tourism Vancouver, Tourism Whistler, VANOC, other tourism regions, and national and international media outlets, will raise the awareness for Aboriginal culture in British Columbia and give Aboriginal tourism a tremendous boost on the world stage.

10.1 Visitors' Interests for Aboriginal Cultural Tourism

Both visitors to British Columbia and residents of the province are potential clients for Aboriginal cultural tourism. Additionally, within each market group, there are different interests and different approaches to experiencing Aboriginal cultural tourism. There are visitors that:

- seek to integrate the Aboriginal cultural tourism experience into an overall British Columbia experience, meaning they are looking for a 'taste of Aboriginal culture';
- want an adventure, sightseeing or wildlife viewing experience that is enhanced by the additional element of Aboriginal interpretation;
- have a specific interest in Aboriginal culture and a preference for a more extensive and interpretive experience;
- are completely unaware that Aboriginal culture exists in British Columbia and, in some instances, do not even understand what the words Aboriginal or First Nations mean. These are visitors that may unexpectedly discover an Aboriginal cultural tourism experience.

Visitors who have a specific interest in Aboriginal culture, while high yield, probably represent only a small share of the potential market. Research suggests that the greatest opportunity for revenue growth is among visitors looking for a taste of Aboriginal culture or Aboriginal culture as an enhancement of their experiences in British Columbia.

10.2 Product and Market Challenges

An effective marketing strategy for Aboriginal cultural tourism needs to take into account and address the current challenges in both product development and marketing, as outlined below.

10.2.1 Product Challenges

According to ATBC, as of fall 2004, 39 of their Aboriginal members would be considered market ready. Not all of these members sell or seek to sell cultural packages. A clear understanding of the 'market ready' criteria in place and how many cultural tourism businesses meet the criteria is needed. An approach to accomplish this is outlined in **Section 8.1.1.2**.

Many other Aboriginal suppliers are still in the early stages of business operations (start-up) or development, thus they are not market ready, and / or do not offer cultural experiences. Further, according to the evaluation of Aboriginal tourism businesses completed as part of this Blueprint Strategy, many Aboriginal businesses – such as hotels and campgrounds – operate in the service sector and therefore do not necessarily package or promote a cultural experience.

Another issue that challenges the marketing of Aboriginal cultural tourism products is the emerging character of this type of experience. **Aboriginal cultural tourism is not currently recognized as a mainstream tourism product** and as such requires highly targeted marketing and partnership opportunities to succeed. Consequently, linkages to tourists seeking cultural dimensions as part of their travel experiences are needed. To widen the audience for Aboriginal cultural tourism experiences, Aboriginal businesses must design their products so they can be introduced into more mainstream markets via traditional touring itineraries or sightseeing excursions. Key to this approach is having the appropriate type of product, product features and product durations (e.g., offering a half day guided tour instead of a four day fully integrated cultural experience). For integration into markets of nature and adventure enthusiasts, the cultural component might come in the form of an Aboriginal interpretative program delivered by an Aboriginal interpreter, story teller and /or entertainer. Another opportunity for such integration might occur in the form of physical infrastructure of accommodation, restaurants, museums and attractions that displays cultural features / designs associated with Aboriginal culture (e.g., totem poles, teepees, long house, geometric designs, colors, materials). These products need to be offered on routes and at locations frequented by tourists and the travel trade.

Additionally, as identified in **Section 2.3** of this document, an issue with most Aboriginal cultural tourism businesses, including market ready businesses, is that they are unable to sustain a presence in the market. This inability can be due to many factors, such as: lack of financial or human resources; or lack of knowledge of how to implement a marketing program geared towards the non-local market; or how to effectively work with the market.

The community consultations and surveys of travel trade conducted as part of the Blueprint Strategy also identified that there are only limited links between Aboriginal operators and mainstream tourism operators and marketing organizations.

These challenges make it difficult for the Aboriginal cultural tourism industry to grow and sustain itself.

10.2.2 Market Challenges

Through the community consultations, consumer surveys and travel trade interviews conducted for the Blueprint Strategy, some key challenges that make it difficult to offer Aboriginal cultural tourism products to visitors were identified. These are:

- issues related to the use of stereotypical imagery by tourism marketing organizations, including their appropriateness;
- lack of integration of Aboriginal cultural tourism marketing and consistent positioning within provincial and regional tourism marketing initiatives;
- lack of sophistication and knowledge of Aboriginal suppliers to work with tour operators in the manner and within the timelines required to capitalize on market opportunities to develop successful partnerships;
- lack of understanding of what Aboriginal cultural tourism means, what products are available, how to find Aboriginal cultural tourism suppliers and how to know what is market ready; and
- difficult for tourists interested in Aboriginal cultural tourism products in British Columbia to find information when planning their tour, as well as while they were in the province.

10.3 Product and Marketing Development Approaches

In recognition of the identified product and marketing challenges, recommended product development and marketing approaches to ensure Aboriginal cultural tourism products fulfill market interests and expectations are provided below. These approaches are outlined below. They are suggested because they are the most effective actions to meet the needs of the target markets (the independent traveller and the travel trade).

10.3.1 The Product

The situation review and travel trade interviews suggest the following approaches to address the identified market related product challenges:

- Develop a market ready certification and branding program for Aboriginal cultural tourism products that provides tour operators with a ‘third party’ endorsement of the market readiness of the product.
- Provide opportunities for Aboriginal and non-Aboriginal tourism industry representatives and operators to network with each other, possibly leading to partnerships and tours that could be supported by a ‘matchmaking’ service.
- Build Aboriginal tourism skills and knowledge in the areas of product development and marketing so that cultural tourism business managers have the knowledge required to effectively create and market products in demand by the market. Additionally, provide financial resources combined with business training to assist Aboriginal tourism owners to manage and grow their businesses in the start-up years.
- Promote awareness of Aboriginal tourism business opportunities amongst non-Aboriginal tourism operators and vice versa.
- Establish an integrated approach for delivering marketing support programs to market ready Aboriginal cultural tourism businesses, incorporating media relations, advertising, publications and distribution, participation in marketplaces, consumer awareness promotions, e-marketing, familiarization tours and on-going mentoring support.

- Ensure that Visitor Information Centres are educated on the Aboriginal cultural tourism products and First Nations in their region and act as a sales arm and distribution centre for the market ready Aboriginal tourism businesses in their jurisdiction.
- Integrate with Hello BC to handle the booking of market ready Aboriginal cultural tourism experiences that require call centre support.

10.3.2 The Market

The situation review, consumer interviews and travel trade interviews suggest the following approaches to address the market challenges identified in the interviews.

- Develop a unique brand, positioning image and message for the Aboriginal cultural tourism experience in British Columbia and consistently integrate this into Federal and Provincial advertising, marketing, sales and media relations activities as well as the activities undertaken by the province's official tourism regions and ATBC.
- Provide an effective marketing mechanism for creating and nurturing awareness of and demand for Aboriginal cultural tourism in British Columbia.
- Make it easier for the independent traveller to access information on Aboriginal cultural tourism experiences in British Columbia when they're planning their visit as well as once they're in the province.
- Establish and nurture tour operator partnerships with companies that can effectively market and sell cultural tourism experiences to the right consumer audience for Aboriginal culture.
- Expand the positioning of Aboriginal cultural tourism products by integrating them into other product clusters such as Outdoor and Adventure, Nature Viewing, Touring, Arts and Culture, and Cuisine, in order to present Aboriginal cultural experiences to a broader audience.

In developing the action plan for marketing to domestic and international markets, it is important to understand how visitors research, plan and purchase their vacations. These processes are summarized by market as follows:

Overseas Visitors

- The overseas visitor tends to buy pre-packaged vacations or portions of their vacation to Canada via a tour operator or travel agent in their country, either as part of a group tour or travelling independently, potentially with a rental car or motor home. They do use the Internet to assist them with their vacation planning; however their tendency to book long haul destinations via the Internet is relatively low.
- A very high percentage of overseas tour operators purchase their ground services in Canada from a Receptive Tour Operator, while a smaller percentage of tour operators buy services directly from the supplier.
- The Receptive Tour Operator contracts the services of suppliers and either re-sells these services to tour operators as a stand alone product or packages a combination of services and experiences into packages and then sells this package to the tour operators.

North American Visitors

- A percentage of North American visitors buy pre-packaged vacations similar to the overseas market. However, there are also a large percentage of travellers who make their own travel arrangements directly with the supplier of the services. The number of North American visitors that travel on group tours is decreasing, while independent travellers and family travel is rising. Most travel in British Columbia is done by car, with some visitors travelling by boat, train aboard VIA Rail or on packaged rail tours that offer a variety of rail services.
- The North American visitor utilizes travel guides, magazines, newspapers, television, the Internet, referrals, advertising and destination marketing information to help them plan their vacation.

It is also important to keep in mind that these processes are changing as technology evolves and marketers and consumers develop more effective ways to communicate. Thus marketing strategies will require frequent review and adjustment.

10.4 Target Markets

An important aspect of expanding Aboriginal cultural tourism in British Columbia is understanding and selecting key markets to pursue such as promoting Aboriginal cultural tourism products and First Nations to visitors / tourists (independent traveller), as well as ‘influencers’ who help to build the product and / or promote and create awareness of the product to visitors. The influencers are the travel trade such as tour operators and packagers, media, and marketing intermediaries.

The three key markets for the short term marketing activities are listed below and described further herein.

- Independent traveller
- Travel trade / tour operators
- Mainstream tourism businesses

10.4.1 Independent Travellers

The independent traveller can be a resident of British Columbia, a visitor from elsewhere in Canada or an international visitor from the US, Mexico or overseas. Independent travellers may have pre-purchased travel arrangements through a travel agent or tour operator, or they may plan and book their own vacation. To reach these travellers, it is most important that actions are taken to strengthen the image of Aboriginal culture in relation to the impression of British Columbia and to ensure that this image is available at every ‘touch point’ that the traveller may encounter in their vacation planning process as well as once they are in the province. This includes:

- appropriate Aboriginal images and packages in tour operator brochures;
- media articles and images in travel magazines;
- editorials with images in travel guides and television;
- consistent images in TBC and regional tourism publications;
- Aboriginal cultural tourism content in TBC’s quarterly e-newsletter as appropriate;
- Aboriginal images and market ready products included on the TBC and ATBC websites;
- E-marketing activities intended to drive inquiries on Aboriginal tourism to market ready Aboriginal tourism products in British Columbia.

- Inclusion of market ready Aboriginal cultural tourism products in other product sectors (i.e., nature-based activities, accommodations, etc.).

10.4.2 Travel Trade/Tour Operators

The ‘in-market’ sales channel that tour operators provide to the traveller makes them an invaluable distribution vehicle for Aboriginal cultural tourism experiences, especially for long haul and international travellers. They are able to effectively market Aboriginal cultural tourism to target markets, resulting in more effective and efficient use of marketing resources. Tour operator involvement in the marketing of Aboriginal cultural tourism products will also help ensure that a strong, credible Aboriginal cultural tourism sector develops. In particular, a tour operator oriented marketing strategy for Aboriginal cultural tourism offers the qualities listed below.

- **‘Product on the Shelf’ Suited to the Market** – This ensures the vacation package duration, accommodation and activity selection options suit the needs of the intended markets, and in most cases, assists the visitors’ travel by providing transportation from the clients’ origin regions to British Columbia and the Aboriginal cultural tourism product supplier.
- **Quality Assurance** – Most international tour operators will only sell market ready products. Thus, a consumer buying an Aboriginal experience through a tour operator has the assurance of buying a ‘pre-qualified’ product. As a result, successfully marketing Aboriginal cultural tourism through respected tour operators provides a quality assurance level needed for the introduction of new market ready experiences into the marketplace.
- **Awareness Building** – By developing tourism products as integral components of tour operator packages, the Aboriginal cultural tourism image will be strongly promoted in key international markets, reaching markets that are not readily or easily accessed by the Aboriginal tourism operator. Many tour operators are strong and effective marketing allies of TBC and can help to generate awareness of Aboriginal cultural tourism opportunities in British Columbia.
- **Accessibility and Multiple Visits** – Many Aboriginal cultural tourism products and services are not on main touring routes, roads cannot be accessed by buses or rental vehicles (i.e., road construction is gravel or single vehicle), air travel costs are high, businesses are not constructed to accommodate tours or packages, and consequently are not integrated into broader touring packages. Some tour operators are able to combine several tourism products and services into seamless packages within a single travel itinerary provided the product meets their requirements, provided the product first fulfills basic packaging requirements. The packages the tour operators develop may also include transportation components that make access to more remote locations easier. Once established, such packages can be used to promote multiple visits by a range of markets to Aboriginal cultural tourism businesses that are on the tour itinerary.
- **New Customers for Aboriginal Cultural Tourism** – A few issues arise for attracting new customers to Aboriginal tourism. First, building awareness amongst visitors that may not be aware of the Aboriginal cultural tourism experiences available in British Columbia. Second, a large percentage of visitors to British Columbia purchase group or independent travel packages without even considering including other experiences such as Aboriginal tourism. Similarly, tourists travelling in groups will likely not visit an Aboriginal cultural experience unless it is part of their group’s itinerary. Tour operators can partner with Aboriginal cultural tourism businesses to ‘softly’ introduce Aboriginal experiences into their tours. They can incorporate ‘tastes of Aboriginal culture’ into rail tours, city vacations, sightseeing tours,

multi-day tours, adventures and even ski and golf vacations, essentially giving visits and opportunity to sample the product before committing to a full experience.

- **New Distribution Channels** – By establishing strong tour operator support for Aboriginal cultural tourism in key markets, market ready Aboriginal cultural tourism businesses will have an effective and affordable ‘pipeline’ to the consumer market via the tour operators. This alleviates major investment by Aboriginal cultural tourism suppliers in ‘in-market’ activities including translation of marketing materials, attending marketplaces, purchase of mass market advertising, and cost of print materials for general consumers. For the consumer, it gives them a level of quality assurance and protection.
- **Consumer Protection Laws** – In most international markets the traveller is protected when booking their vacation through an in-market tour operator. If anything goes wrong with their vacation, Consumer Travel Protection laws normally provide them with financial compensation. This is an added incentive for consumers to book their vacations through a trusted tour operator in their country, versus booking directly with the supplier.
- **New Product Development** – Tour operators typically develop packages based on consumer market trends and interests. Tour operators are an excellent sounding board for product development and expansion by helping to determine saleable products, acceptable pricing points, new product interests, and emerging market needs. They are also especially invaluable partners for introducing new products into the marketplace.
- **Experiential Packages** – Tour operator packages featuring learning, interpretation, hands-on and behind the scenes experiences can bring Aboriginal culture alive for travellers. Tour operator packages provide a valuable means of bringing together multiple experiences within a single itinerary. Tour operators can make Aboriginal cultural tourism experiences more accessible to consumers by integrating them within broader itineraries.
- **Effective Communications Through ‘Trackable’ Call to Action** – Typically tour operators close sales with the client in the client’s time zone, language and currency. Therefore it is normally easier for travellers to buy independent or group vacation experiences through a tour operator, especially if it is to a destination they have not previously visited. Tour operators are also able to track the travel behaviours of these consumers, making them a valuable source of information on Aboriginal cultural tourism product preferences for future product development and marketing activities. For the Aboriginal cultural tourism business, the relationship with the tour operator enables the Aboriginal business to better control their communications with clients and save on servicing costs since the tour operator provide language services and direct communications with the client.
- **Deliver Consistent Business** – Tour operators can deliver consistent pre-booked business. This would provide Aboriginal cultural tourism businesses with a steady revenue stream, improving their financial condition and providing a base to build on by attracting independent travelers.

10.4.3 Mainstream Tourism Businesses

Partnerships with other tourism operators provides Aboriginal cultural tourism businesses with access to markets they might not easily connect with and, by connecting with other products, their own product is strengthened - thereby increasing their profile and credibility in the marketplace. Furthermore, these partnerships can enhance the destination’s profile in the region resulting in an accelerated achievement of the goals to build awareness and sales.

Relationship building between Aboriginal tourism suppliers and non-Aboriginal tourism suppliers begins with dialogue. An opportunity for this could be a pre-conference session associated with the annual BC Tourism Industry Conference. More specifically, it is recommended that the Aboriginal tourism industry partner with organizers of the BC Tourism Industry Conference to deliver a smaller and more focused Aboriginal Tourism Industry Session before the main conference and incorporated in the main conference’s program. The details of this partnership are described in **Section 10.5.1.1: British Columbia Tourism Industry Conference Partnership.**

10.5 Marketing Mix

Marketing activities target the independent traveller, the travel trade distribution channels that sell packaged group and individual (FIT) travel experiences to British Columbia including the media that help to promote the British Columbia and Canada tourism industry, and mainstream tourism businesses. Activities to reach these markets need to respond to the market’s unique characteristics and be implemented at times that take into account tourism industry cycles and the range of Aboriginal cultural tourism businesses at various development stages (e.g., new businesses (tier 1, existing that are not market ready (tier 2), market ready (tier3)).

Implementation of the Marketing Strategy entails combining marketing activities between TBC and the Aboriginal cultural tourism industry. In particular, there is a need to develop integrated activities and resources that promote Aboriginal cultural tourism in TBC’s marketing program including the regional tourism association marketing initiatives as part of the marketing approach and mix.

The marketing strategy is presented in three phases over a three year period.

- **Short Term:** March 2006 – February 2007
- **Medium Term:** March 2007 – February 2009
- **Long Term:** March 2009 – February 2010

In this strategy, the medium and long term activities are combined.

The marketing mix includes advertising, direct sales, media and public relations, print materials, data collection, information materials, special events, packaging, and websites. These further described in **Exhibit 10.1** by main categories with the key activity in point form and then details along with market and rationale associated with the marketing activity and the suggested implementation periods are provided in **Exhibit 10.3.**

Exhibit 10.1: Marketing Mix Summary

Marketing Mix	Marketing Activity for:		
	Short Term	Short Term Continued into Medium / Long Term	New Medium / Long Term
100-Collateral / Marketing Materials			
Print Materials	<ul style="list-style-type: none"> • Aboriginal cultural tourism guide • ATBC quarterly newsletter • Marketing resource materials 	<ul style="list-style-type: none"> • Aboriginal cultural tourism guide • ATBC quarterly newsletter • Marketing resource materials 	<ul style="list-style-type: none"> • German language brochure • Other languages brochures • 2010 Winter Games brochures
Resource Collection	<ul style="list-style-type: none"> • Market ready database • Brochure collection 		

Marketing Mix	Marketing Activity for:		
	Short Term	Short Term Continued into Medium / Long Term	New Medium / Long Term
Images Databank	<ul style="list-style-type: none"> Photo shoot Branding and image selection Images CD 	<ul style="list-style-type: none"> Image bank updating 	<ul style="list-style-type: none"> Film images CD / Video / DVD
Materials Distribution	<ul style="list-style-type: none"> Aboriginal cultural tourism guide Resource materials distribution 	<ul style="list-style-type: none"> Aboriginal cultural tourism guide Resource materials distribution 	<ul style="list-style-type: none"> Promotional items distribution
200-Advertising and Promotions			
Advertising	<ul style="list-style-type: none"> Display advertisements purchase Outdoor adventure guide section Special events promotions advertising Gateway location advertising Advertising program awareness 	<ul style="list-style-type: none"> Display advertisements purchase Outdoor adventure guide section Special events promotions advertising Gateway location advertising Advertising program awareness 	<ul style="list-style-type: none"> Featured brands and images International publication display ads 2010 Winter Games images
Promotional Events	<ul style="list-style-type: none"> ATBC AGM and Awards 	<ul style="list-style-type: none"> ATBC AGM and Awards 	
E-Marketing / Website	<ul style="list-style-type: none"> E-marketing campaign Aboriginal cultural experiences website – on-line resource library, image library, media section 	<ul style="list-style-type: none"> Aboriginal cultural experiences website – updating 	
TBC Website	<ul style="list-style-type: none"> Aboriginal pages - build Website photo images TBC e-newsletter 	<ul style="list-style-type: none"> Website photo images – updating 	
2010 Winter Games Aboriginal Website			<ul style="list-style-type: none"> Winter Games Website
300-Industry / Trade / Public Relations			
Communication and Education	<ul style="list-style-type: none"> Tour operator communications program Awareness workshops Cultural protection protocols information Hello BC Call Centre staff presentations TBC Sales Staff education 	<ul style="list-style-type: none"> Cultural protection protocols information Hello BC Call Centre staff presentations TBC Sales Staff education 	<ul style="list-style-type: none"> TBC Germany office promotion Aboriginal themed fam tours
Marketplaces and Travel Shows	<ul style="list-style-type: none"> Rendezvous Canada Booth Canada's West Marketplace – exhibit and attendance Tour operator marketplace promotion International Marketplace promotion Aboriginal themed travel trade fam tours 	<ul style="list-style-type: none"> Rendezvous Canada Booth Canada's West Marketplace – exhibit and attendance Tour operator marketplace promotion Aboriginal themed travel trade fam tours 	<ul style="list-style-type: none"> Exhibit partnership International marketplace presence Consumer adventure show exhibit
BC Tourism Industry Conference Partnership	<ul style="list-style-type: none"> Conference partnership – planning, exhibit, speakers, matchmaking service, awards, pre-conference event 	<ul style="list-style-type: none"> Conference partnership – planning, exhibit, speakers, matchmaking service, awards, conference event 	

Marketing Mix	Marketing Activity for:		
	Short Term	Short Term Continued into Medium / Long Term	New Medium / Long Term
Partnership Exploration	<ul style="list-style-type: none"> Japanese partnership exploration Receptive tour cooperative marketing partnerships Market ready partnership development 	<ul style="list-style-type: none"> Receptive tour cooperative marketing partnerships Market ready partnership development 	<ul style="list-style-type: none"> Special interest tour cooperative marketing partnerships
Other communications	<ul style="list-style-type: none"> Other communications 	<ul style="list-style-type: none"> Other communications 	
400-Media Relations			
Media relations specialist	<ul style="list-style-type: none"> Media relations specialist Story ideas Press release distribution TBC editorials Event promotion Media fam tours Media marketplace attendance 	<ul style="list-style-type: none"> Media relations specialist Story ideas Press release distribution TBC editorials Event promotion Media fam tours Media marketplace attendance 	<ul style="list-style-type: none"> Media resource tools Olympic Games media promotions
500-Product Development			
Product Development	<ul style="list-style-type: none"> Aboriginal cultural tourism product development Assess tour operator aboriginal product packaging Accommodation packages Market ready standards 	<ul style="list-style-type: none"> Aboriginal cultural tourism product development Assess tour operator aboriginal product packaging Accommodation packages Market ready standards 	<ul style="list-style-type: none"> Welcome sign installation

10.5.1 Short Term Marketing

The short term component of the Marketing Strategy requires that tour operators and media become partners in promoting Aboriginal cultural tourism to domestic and international visitors. To do this tourism operators must overcome the industry held perception that Aboriginal cultural tourism businesses are not consistent or reliable in their program delivery. This perspective makes it difficult for market ready Aboriginal businesses to be seriously considered by tour operators for inclusion in their tour programs. Furthermore, the Aboriginal cultural tourism industry lacks knowledge of how the tour operators work and how to establish ties with them. This mutual lack of understanding of each other’s businesses and products creates a hurdle to successful partnerships.

To begin changing this belief, in the short term it is essential that only credible Aboriginal businesses that have worked with international markets and satisfy recognized industry market ready criteria be promoted to tour operators. This means the stringent application of ‘market ready’ criteria in the selection of market ready Aboriginal cultural tourism businesses for inclusion in short term marketing activities. The success of such Aboriginal businesses in professionally delivering experiences to tour operators and their clients will help to nurture stronger partnerships. It will also create a much higher level of mutual trust between Aboriginal cultural tourism suppliers and tour operators. Once this trust is established, more tour operator programs can be established that will help to generate greater demand for other Aboriginal cultural tourism experiences in the short and long term thus enabling more market ready Aboriginal cultural tourism businesses to participate in marketing programs.

This Short Term Marketing Strategy is focused on marketing activities that support market ready Aboriginal cultural tourism products per the ATBC market ready standards (see the approach for defining Market ready products **Section 8.1.1.2**) which use the TBC export ready criteria as the

foundation. The plan also responds to key Aboriginal cultural tourism related marketing awareness issues and gaps as identified in the consumer, community and tour operator consultations and focuses on products that are in demand by the market.

The Short Term Marketing Strategy activities for independent travellers and the travel trade markets listed below are outlined in **Exhibit 10.3: Marketing Implementation Activities**.

- **Independent Travellers** – In the short term, there are limitations in the amount of effort that can be directed at the independent traveller prior to their arrival in BC since a longer lead time is required to put many activities into place and as well, a consistent brand image still needs to be developed to ensure brand consistency. However, utilizing existing tourism information distribution outlets in British Columbia, the Internet, short lead time media, and working with ATBC's current group of market ready Aboriginal cultural tourism suppliers, some efforts can be taken to profile Aboriginal cultural tourism experiences as well as facilitating bookings of Aboriginal cultural tourism experiences during the upcoming spring/summer/fall travel period.

Since independent travellers research their vacation through various sources including the Internet and short haul travellers that reside within the Aboriginal cultural tourism product region are more likely to make short term travel plans, marketing activities can still be implemented that immediately benefit Aboriginal tourism. Short haul travellers can be prompted by short term marketing activities such as editorial and special promotional packages found in newspapers and regional magazines such as British Columbia Magazine, Western Living and Westworld, through newsletters and other promotions. And, once visitors are in the province, they need to be able to learn about Aboriginal cultural tourism experiences available through information sources such as the Visitor Information Centres, on billboards and signage in the airport as well as on the highways and brochures distributed at key tourist locations.

The short term marketing activities directed at the independent traveller are proposed for the purposes of creating consumer awareness amongst cultural enthusiasts and nurturing a demand for Aboriginal cultural tourism experiences, whether purchased directly from the supplier or via tour operators or online travel companies.

- **Tour Operators** – Due to the extended product development, contracting and marketing cycles required by most tour operators, most activities to engage tour operators with new products must occur more than a year in advance of the operator's marketing program. Therefore, it is important that the Short Term Marketing Strategy commence during the winter 2006 so that market ready Aboriginal cultural tourism businesses can be presented to tour operators when they are making their buying decisions for 2007.

As with the overall Blueprint Strategy, the Short Term Marketing Strategy is market-driven and is reliant on a close cooperation between TBC and ATBC. The product experiences and markets targeted for promotion mirror the recommendations outlined in **Section 5.2: Product-Market Match Recommendations**. The key features of the recommended Short Term Marketing Strategy are:

- Collateral / Print Materials;
- Advertising and Promotions;
- Industry / Trade and Public Relations;
- Media Relations; and

- Product Development.

The Short Term Marketing Strategy responds to key Aboriginal tourism related marketing awareness issues and gaps as identified in the consumer, community and tour operator consultations. The general structure for the short term marketing strategy plan is outlined in **Exhibit 10.3**.

10.5.1.1 British Columbia Tourism Industry Conference Partnership

It is recommended to explore recognizing the British Columbia Tourism Industry Conference as a co-host of the Aboriginal Tourism Industry Session in the Aboriginal Tourism Industry Conference's promotional materials and vice versa. A committee consisting of Aboriginal tourism and British Columbia Tourism Industry Conference representatives would guide planning for this session.

In the initial year, the partnership between the Aboriginal tourism industry and the British Columbia Tourism Industry Conference (led by the British Columbia Council of Tourism Associations (COTA)) could be established. This could also involve participation of an Aboriginal tourism representative in the planning or advisory committee to the BCTIC. The following years (2006 and beyond) could see the implementation of the pre-BCTIC Aboriginal Tourism event.

The Aboriginal Tourism Industry Session could be a half to a full day and address content specific to satisfying the information and skills development needs' of Aboriginal tourism operators. The Session would include speakers and workshops that advance skills and knowledge development, as well as a presentation on building Aboriginal tourism partnerships by a British Columbia tourism industry leader.

Ideally, the British Columbia Tourism Industry Conference would also have the following components incorporated into their event:

- a workshop dedicated to Aboriginal cultural tourism (developed by Aboriginal people), or several Aboriginal speakers in workshop panels where the sessions are not solely dedicated to Aboriginal tourism; and
- a plenary discussion panel that included a representative from the First Nations or Aboriginal tourism.

Aboriginal and non-Aboriginal industry partners would be encouraged to set-up exhibits at each other's events (i.e., Aboriginal Tourism Association or Group, and COTA would each set-up an exhibit at the other's event). Direct costs and revenue for the Aboriginal Tourism Industry Conference would be the responsibility of the Aboriginal organizers.

A matchmaking service should also be provided during the British Columbia Tourism Industry Conference. The service would formally introduce Aboriginal and non-Aboriginal tourism suppliers to each other and provide a meeting room where parties could converse.

The Aboriginal Tourism Industry Session would retain its own identity, yet be promoted through the British Columbia Tourism Industry Conference and by the Aboriginal tourism industry. It would be open to both Aboriginal and non-Aboriginal people. An agreement between the British Columbia Tourism Industry Conference and the Aboriginal Tourism session would provide delegates of each a discount to attend both sessions.

Benefits for Aboriginal and non-Aboriginal tourism businesses are the opportunities for networking and initiation of new partner relationships, growing awareness and understanding of Aboriginal cultural tourism business opportunities, protocols and building tourism skills and knowledge.

Exhibit 10.2: Short Term Marketing Strategy

Issue Area	Strategic Response
Tourism Marketing Organization Awareness	<ul style="list-style-type: none"> • A series of communications, meetings, fam tours and workshops to enhance TBC, CTC, DMO's, and RDMO awareness of BC's Aboriginal tourism products and brief the organizations on the strategy and its implementation. • Aboriginal tourism presentations to Hello BC call centre staff on market ready Aboriginal tourism products and provision of information to assist them in referring business to the operators or Aboriginal tourism and Aboriginal tourism support organizations. This would be done annually each spring and include products that are non-commissionable. • Communication with economic development officers and tourism groups such as COTA, business associations, etc. in regards to Aboriginal tourism products. • Provide tourism organizations with information on cultural protection protocols so that they can be guided on working with Aboriginal businesses and as well guide the tour operator and media communities in this area.
Aboriginal Community Awareness	<ul style="list-style-type: none"> • Develop an on-line resource centre on the ATBC website where Aboriginal tourism businesses can source information on business, product and international market development; information sourced from TBC, ATC, INAC and ABC. • Distribute newsletters to Aboriginal tourism which communicate the expectations of the international marketplace for market ready companies and refer them to the ATBC website for more detailed information or resource links. • Post updated market ready standards on ATBC website. • Aboriginal tourism to create an awareness amongst their non-cultural Aboriginal tourism members as to the advertising opportunities that exist to promote their services through existing TBC marketing activities, i.e. Approved Accommodation Guide, Vacation Planner, Outdoor Adventure Guide, BC Escapes, etc.
Tour Operator Community – Awareness, Lack of Materials on Aboriginal Tourism Products	<ul style="list-style-type: none"> • Develop communications program with receptive tour operators. • Assemble database of market ready Aboriginal cultural tourism product suppliers. • Implement a tour operator awareness and promotion campaign. • Assemble supplier resources, images, etc. for use by tourism stakeholders.
Marketing Materials	<ul style="list-style-type: none"> • Collect Aboriginal cultural tourism brochures for use by tour operators and others featuring market ready cultural tourism products; German translated version developed for ITB and Rendezvous Canada . • Develop an Aboriginal cultural tourism section in BC Outdoor Adventure Guide and Vacation Planner. • Produce high resolution image CD utilizing images from market ready Aboriginal tourism. • Establish a section on Aboriginal cultural tourism on the home page of www.hellobc.com with a link to ATBC website. • Produce promotional videos / DVDs / CDs. • Develop an Aboriginal cultural tourism section in Parks Canada's National Parks Messages and in their website
Marketing Actions	<ul style="list-style-type: none"> • Include market ready Aboriginal cultural tourism experiences / packages in the BC Escapes program in western US. • Establish an Aboriginal cultural tourism exhibit at Canada's West marketplace and imagery / profile in Canada's West Directory and other opportunities for exposure including potentially hosting a function. • Ensure Aboriginal tourism attend Canada's West Marketplace as a seller delegate and has appointments with tour operators. • Conduct marketing through in-market TBC and CTC offices in Germany including ITB and special print / on-line promotions as well as media relations. • Promote Aboriginal cultural tourism at international marketplaces and tradeshows. • Provide TBC staff with promotional materials for international marketplaces and tradeshows. • Establish partnerships with Japanese tour operators to market at Japan's Expo. • Apply for an Aboriginal cultural tourism booth at Rendezvous Canada.

Issue Area	Strategic Response
Media Awareness	<ul style="list-style-type: none"> • Coordinate familiarization tours for media and TBC media staff. • Have TBC promote Aboriginal themed story ideas to media in Canada, US, Europe and Asia-Pacific markets. • Attendance by Aboriginal cultural tourism at Media Marketplace and Go Media. • Prepare story ideas for media focused on Aboriginal cultural tourism experiences. • Develop press kit. • Distribute regular press releases with themed topics suited to various audiences. • Update media section on ATBC website to feature press releases by date and title and highlighting support services available for media (e.g., fam trips, images, story ideas).
Partnership with BC Tourism Industry Conference	<ul style="list-style-type: none"> • Establish an Aboriginal tourism conference planning committee that includes a BC Tourism Conference representative for the pre-BC Tourism Industry Conference event. • Have an Aboriginal tourism representative on the BC Tourism Industry Conference planning committee. • Identify critical planning deadlines for the BC Tourism industry conference and ensure the Aboriginal Tourism Conference implementation plan to responds to / is compatible with those deadlines. • Canvas Aboriginal tourism on desired topics and speakers. • Develop an Aboriginal Tourism Conference plan and funding proposal and solicit funding sponsors. • Set up a 'matchmaking' service for Aboriginal and Non-Aboriginal tourism operators and travel trade. • Coordinate an Aboriginal cultural tourism exhibit promotion First Nations culture and Aboriginal tourism products for the BC Tourism Industry Conference.

10.5.2 Medium and Long Term Marketing

The purpose of the medium / long term marketing strategy is increasing awareness and demand in the province’s key markets for Aboriginal cultural tourism experiences, as well as increasing the availability of Aboriginal cultural tourism experiences for purchase and making it easier to find the product. Promotional and sales activities will position Aboriginal cultural tourism in the markets and as well ensuring that market ready Aboriginal cultural tourism suppliers are provided with marketing opportunities that place their product into the hands of the right market.

This program also nurtures expanded opportunities for Aboriginal culture and tourism experiences by incorporating media relations activities surrounding the 2010 Olympic and Paralympic Winter Games as well as the Cultural Olympiad as a means to promote Aboriginal cultural products, experiences and brand images and improve the understanding of First Nations by the visitors. The North American Indigenous Games in 2008 (Cowichan Valley), will also play an important role in promoting and showcasing Aboriginal Cultural Tourism opportunities.

Aboriginal tourism products and services, which do not incorporate a strong cultural component, will be marketed through existing TBC and DMO / RDMO programs which focus on key tourism sectors such as touring, outdoor and adventure, golf, ski and accommodation, and are less dependent on cultural experiences as part of the product.

The Blueprint Strategy is designed to deliver the Aboriginal cultural tourism product to key markets through various distribution channels – tour operators, media, advertising, Internet, promotions, and events – direct to the visitor when they are planning their vacation, as well as once they are in the province. Additionally, this strategy incorporates an element to support Aboriginal community awareness and development of tourism products. The strategy will also provide an Aboriginal cultural tourism brand and associated imagery to support the marketing program.

This Aboriginal Cultural Tourism Blueprint Strategy for British Columbia focuses its marketing efforts on the travel trade, media and the independent traveller, as well as incorporating an element to support Aboriginal community awareness and development of tourism. The strategy targets these sectors through a variety of marketing, sales, development and networking activities. Elements of the medium and long term strategy are summarized in **Exhibit 10.3**.

Exhibit 10.3: Marketing Implementation Activities

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
100	Collateral / Marketing Materials							
110	PRINT MATERIALS							
111	ABORIGINAL CULTURAL TOURISM PUBLICATION – Produce publication featuring market ready Aboriginal cultural tourism products that meet the updated market ready standards. This publication would be distributed to tour operators, media, consumers, TBC and CTC international offices, ATBC, VIC's and other high traffic tourism locations. It would also be reproduced annually.	✓	✓	✓	✓	✓	*	Annually
112	GERMAN LANGUAGE BROCHURE – Produce a German-language consumer brochure focused on Aboriginal cultural tourism for distribution at the ITB marketplace and other consumer promotions showcasing the market ready Aboriginal cultural tourism products, maps and suggested itineraries for RV and fly-drive excursions, and a listing of German tour operators capable of selling these products. Brochure should also be distributed at motorhome rental locations in BC and Alberta, VIC's, hotels and attractions in regions frequented by German visitors.	✓	✓	✓				2007 – Beyond
113	OTHER LANGUAGE BROCHURES – Develop brochures promoting market ready Aboriginal cultural tourism experiences in multiple languages that suit each of the markets they are presented in (English, French, German, Japanese).	✓	✓	✓				2007– Beyond
114	2010 WINTER GAMES BROCHURES – Develop special brochures focused on 2010 Cultural Olympiad and 2010 Olympic and Paralympic Winter Games featuring First Nations images and cultural experiences, translated into multiple languages (English, French, German, Japanese).	✓	✓	✓				2009 – 2010
115	ATBC QUARTERLY NEWSLETTER – ATBC to distribute quarterly newsletters to their members, keeping them current on market issues, marketing, partnership, education opportunities and success stories of Aboriginal tourism businesses.					✓		Quarterly
116	MARKETING RESOURCE MATERIALS – Develop resources for use by tourism stakeholders including press kits, maps highlighting location of market ready suppliers, image CD, market ready product profile brochure for tour operators featuring information important to tour operators (e.g., photos, descriptive, itinerary suggestions, driving, parking, closest meal and hotel locations and website links). The brochure should also list the Receptive Tour Operators that work with each supplier. Also distribute materials to tour operators and media during appointments at marketplaces in preparation for their 2006 planning.	✓	✓		✓	✓	*	Ongoing

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
117	ABORIGINAL TOURISM SUPPLIER NEWSLETTER – Distribute quarterly newsletters to Aboriginal tourism suppliers which communicate the expectations of the international marketplace for market ready companies and refer them to the ATBC website for more detailed information or resource links.					✓	*	Ongoing quarterly
118	NORTH AMERICAN INDIGENOUS GAMES- Develop material around the games to showcase Aboriginal Cultural Tourism	✓	✓	✓	✓	✓		2008/9
120	RESOURCE COLLECTION							
121	MARKET READY DATABASE – ATBC, regional and city tourism bureaus and TBC to provide their database of market ready Aboriginal cultural tourism suppliers with product descriptions and website links.				✓	✓	*	Ongoing
122	BROCHURE COLLECTION – Contact market ready suppliers to request a quantity of their brochures, product descriptions, images for print and website links.				✓	✓	*	Ongoing annually
130	IMAGES DATABANK							
131	PHOTO SHOOT – Photo shoot of Aboriginal cultural experiences in partnership with INAC and other agencies. Images should feature scenery, culture, attractions, performances, food, arts and crafts. First Nations involvement is essential for approval and direction of image use. Instructions on the use of these photographs should be included with the CD.				✓	✓	*	
132	FILM IMAGES – Film Aboriginal cultural experiences, sites, art, etc. and provide as 'B' roll to media to make it easier for them to integrate an Aboriginal cultural image into their presentations related to 2010.		✓					2009
133	BRANDING AND IMAGE SELECTION PROCESS – Implement selection process of Branding and Image for Aboriginal cultural tourism. Process must ensure the photos and images used are approved by First Nations and culturally appropriate. Any distribution of these images should be accompanied by a guide to image use.				✓	✓	*	
134	IMAGES CD – Produce high resolution image CD utilizing images from market ready Aboriginal cultural tourism experiences and destinations, promotional videos/DVD's/CDs in partnership with INAC and other agencies.				✓	✓	*	
135	CD / VIDEO / DVD – Develop new CD/Video/DVD promoting Aboriginal cultural experiences which can be used as a selling tool by tour operators and special interest tour operators and can also be featured as a streaming video on the TBC and ATBC websites.	✓			✓	✓		2009
136	PHOTO LIBRARY UPDATED – Annually update Aboriginal cultural tourism photo library with annual photo shoot of Aboriginal cultural experiences in partnership with INAC and other agencies	✓	✓		✓	✓		2007 – Beyond
140	MATERIALS DISTRIBUTION							
141	ABORIGINAL CULTURAL TOURISM GUIDE DISTRIBUTION – Ongoing distribution of Aboriginal Cultural Tourism Guide through VIC's, TBC offices, CTC offices overseas, within Aboriginal attractions and communities.	✓	✓	✓	✓	✓	*	Ongoing
142	RESOURCE MATERIALS DISTRIBUTION – Distribute market ready Aboriginal cultural tourism supplier guide, press kits, maps and product profiles to short lead time media and VIC's, TBC and CTC overseas offices.		✓	✓	✓	✓	*	Annually, Apr – May

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
143	PROMOTIONAL ITEMS DISTRIBUTION – Distribute promotional videos / DVDs / CDs.	✓	✓		✓	✓	*	Feb 2007, ongoing
200	Advertising and Promotions							
210	DISPLAY ADVERTISEMENTS – Purchase large display advertisement in provincially distributed publications and newspapers (i.e., Vancouver Sun, The Province, Victoria Times-Colonist, Western Living, Westworld, and British Columbia Magazine) as well as in regional and local newspapers, promoting Aboriginal events and market ready experiences.			✓	✓		*	Annually, Mar – Sep
211	FEATURED BRANDS AND IMAGES – Incorporate Aboriginal cultural tourism branding and images in TBC marketing, media relations, sales and advertising activities and travel guides so that Aboriginal cultural tourism is consistently seen as a part of BC's experiences. Encourage the same to be done by RDMO's and other tourism organizations that feature First Nations product.	✓	✓	✓	✓	✓		2007 – Beyond
212	OUTDOOR ADVENTURE GUIDE –Work with TBC to develop a means to identify Aboriginal experiences that are also attributed to various activity product clusters such as wildlife viewing, canoeing, rafting, hiking, etc. in 2006 BC Outdoor Adventure Guide and Vacation Planner - Produce/Purchase Aboriginal Cultural tourism section in Parks Canada's Visitor Guide.	✓	✓	✓	✓	✓	*	Annually
213	INTERNATIONAL PUBLICATION DISPLAY ADS – Purchase large display ads in national and international magazines (e.g., Conde Naste, Gourmet, New Yorker, Travel and Leisure, National Geographic Traveler, Sunset Magazine, Canadian Geographic Traveler, BC Magazine) catering to the more affluent, educated traveller that focuses on the cultural experiences of BC and prominently features Aboriginal culture in the message. Call to action should be back to a website or call centre that can book a cultural experience in BC, including an Aboriginal cultural experience.			✓	✓			Starting in 2007 – Annually
214	SPECIAL EVENTS PROMOTION ADVERTISING – Encourage regular promotion of National Aboriginal Day and other Aboriginal cultural events (including the 2008 North American Indigenous Games) through CTC, TBC and RDMO annual publications as well as local media.	✓	✓	✓	✓	✓	*	Annually
215	2010 WINTER GAMES ABORIGINAL IMAGES – Aboriginal culture images incorporated into 2010 Olympic related advertising messages promoted by TBC, Tourism Vancouver and VANOC and Host First Nations.	✓	✓	✓				2008 – 2010
216	GATEWAY LOCATION ADVERTISING – Advertise at key BC gateway locations such as Vancouver International Airport, border entries, and VICs – large display ads (or posters) at point of purchase display supported by a Guide to Aboriginal Cultural Tourism in BC.			✓	✓		*	Annually
260	PROMOTIONAL EVENTS							
261	ATBC AGM AND AWARDS – ATBC to hold annual AGM and Aboriginal Awards Dinner which always has a pre AGM educational workshop for market ready tourism suppliers. The session would inform them of the marketing activities planned for the year, what they need to do to prepare for the season and how to work with tour operators, media, etc.					✓	*	Annually, every Feb

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	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
270	E-MARKETING / WEBSITE							
271	E-MARKETING – Undertake aggressive E-marketing activities which drive Aboriginal cultural tourism inquiries to BC's market ready Aboriginal cultural tourism products; focus on attributing Aboriginal experiences to a variety of themes rather than Aboriginal so that they can be searched on by a variety of key words related to Outdoors, Adventure, Nature, Wildlife, Culture, Art and Food.	✓	✓	✓	✓	✓	*	Ongoing
272	ATBC WEBSITE MEDIA SECTION – Update media section on ATBC website to feature press releases by date and title and highlighting support services available for media (e.g., fam trips, images, story ideas).		✓				*	
273	ABORIGINAL CULTURAL EXPERIENCES WEBSITE – Develop a special website featuring Aboriginal cultural experiences, related to Outdoors, Adventure, Nature, Wildlife, Culture, Art and Food. Work with TBC, VANOC and Tourism Vancouver to incorporate this site, on their websites and on television commercials and print ads as appropriate. This website should also showcase special packages that incorporate Aboriginal cultural tourism experiences around the province that can be purchased through Hello BC, Tourism Vancouver or other reservations outlets.	✓	✓	✓	✓	✓		2009 – Ongoing
274	ATBC WEBSITE ON-LINE RESOURCE LIBRARY – Develop an on-line resource centre on the ATBC website where Aboriginal cultural tourism businesses can source information on business, product and international market development; information sourced from TBC, ATC, INAC and ABC.					✓	*	Ongoing
275	ON-LINE IMAGE LIBRARY – Incorporate online image library on ATBC Website where media and tour operators can download high resolution, print quality images.	✓	✓					2007
280	TOURISM BC WEBPAGES							
281	HELLO BC – Work with TBC to create a section of www.hellobc.com which focuses on Aboriginal tourism, with a link to the ATBC website, similar to a Regional Destination Marketing Organization link.	✓	✓	✓	✓	✓	*	
282	WEBSITE PHOTO IMAGES – Aboriginal images, information and market ready product included on the TBC 'Hello BC' website and ATBC website. Regular updates on information, product and events provided by ATBC.	✓	✓	✓	✓	✓	*	Ongoing updates
283	TBC E-NEWSLETTER – Encourage Aboriginal cultural tourism information to be included in TBC quarterly e-newsletter with link to market ready product section of ATBC website.	✓	✓	✓	✓	✓	*	Quarterly
290	2010 WINTER GAMES ABORIGINAL WEBSITE							
290	WINTER GAMES WEBSITE – Develop an Aboriginal 2010 Olympic and Paralympic Winter Games information website for media and visitors. This site would be connected to VANOC's Olympic site. It would also have links from any 2010 Olympic and Paralympic-related websites to information on Aboriginal culture, links to ATBC website as well as to special website with packages and information.	✓	✓	✓	✓	✓		2009 – 2010
300	Industry / Trade / Public Relations							
310	COMMUNICATION AND EDUCATION							

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
310	TOUR OPERATOR COMMUNICATIONS PROGRAM – Develop a communications and business development program with receptive tour operators that will build awareness and encourage them to introduce more Aboriginal cultural tourism products. Encourage TBC and CTC overseas offices to support this.	✓	✓		✓	✓	*	
311	OVERSEAS PROMOTION –Work with overseas tour operators to put together promotional packages for use at ITB and in special cooperative print / on-line campaigns focused on BC's Aboriginal experiences and targeting the overseas visitor.	✓		✓	✓	✓		2007 – Annually
312	AWARENESS WORKSHOPS – A series of communications, meetings, fam tours and workshops to enhance TBC, VIC, CTC, DMO, and RDMO awareness of BC's Aboriginal cultural tourism products and brief the organizations on the Blueprint strategy and its implementation.	✓	✓		✓	✓	*	
313	CULTURAL PROTECTION PROTOCOLS INFORMATION – Provide tourism organizations with information on cultural protection protocols so that they can be guided on working with Aboriginal businesses and as well guide the tour operator and media communities in this area.	✓	✓		✓	✓	*	Ongoing
314	HELLO BC CALL CENTRE STAFF PRESENTATIONS – Aboriginal cultural tourism presentations to Hello BC call centre staff on market ready Aboriginal cultural tourism products and provision of information to assist them in referring business to Aboriginal cultural tourism operators and Aboriginal cultural tourism support organizations. This would be done annually each spring and include products that are non-commissionable.				✓	✓	*	Annually – Spring
315	TBC SALES STAFF EDUCATION – Ensure that TBC's BC and overseas sales staff are aware of the market ready Aboriginal cultural tourism products available in BC and the receptive tour operators selling the products. TBC and CTC should also have copies of the database and any supplier brochures / marketing materials.	✓	✓		✓	✓	*	Ongoing
320	ABORIGINAL THEMED FAM TOURS – Conduct Aboriginal themed familiarization tours for receptive tour operators, mainstream and special interest tour operators showcasing market ready Aboriginal suppliers that are suited to the market.	✓	✓		✓	✓	*	Annually, May, June, Sep, Oct
320	MARKETPLACES AND TRAVEL SHOWS							
321	RENDEVOUS CANADA BOOTH – ATBC to attend Rendezvous Canada with a booth in the BC section. When Rendezvous Canada is next in Vancouver, (date TBA) Aboriginal culture needs to be a prominent theme of the event and market ready Aboriginal cultural tourism suppliers must be in a position to have meetings with tour operators. Pre and post fam tours could include Aboriginal cultural tourism experiences.	✓	✓		✓	✓	*	Annually, each May
322	CANADA'S WEST MARKETPLACE – ATBC to attend Canada's West Marketplace as a seller delegate and schedule appointments with tour operators and media. Also have Aboriginal cultural tourism exhibit at Canada's West marketplace and imagery / profile in Canada's West Directory and other opportunities for exposure including potentially hosting a function.	✓	✓		✓	✓	*	Annually, every Dec

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
323	TOUR OPERATOR MARKETPLACE PROMOTION – Ensure that Aboriginal cultural tourism products are promoted to tour operators at marketplaces such as WTM in London, Spotlight Canada, Kanata, Showcase Canada, Corroborate, National Tour Association (NTA), Rendezvous Canada and other travel trade promotions attended by TBC staff.	✓	✓		✓	✓	*	Annually
324	EXHIBIT PARTNERSHIP – ATBC to exhibit at the Victoria Clipper Travel Show in Seattle. The focus is to introduce Aboriginal cultural tourism products that can cater to the mainstream and adventure market for short getaways and adventures.			✓	✓	✓		2007 – Annually
325	INTERNATIONAL MARKETPLACE PROMOTION – Promote Aboriginal cultural tourism at international marketplaces and tradeshow.	✓	✓		✓	✓	*	
326	INTERNATIONAL SHOW PRESENCE – Establish a strong Aboriginal culture presence at ITB, WTM and Kanata in Japan, tied in with the promotion of BC and Canada. Event could include performances, food, gifts and prize giveaways. Special media event also to be incorporated and international tour operators with Aboriginal cultural tourism products will be profiled. At each event, a First Nation could be asked to be the host First Nation that would gift a cultural piece to a chosen operator at each of the major shows. Each trade show would provide 'samplings' of the cultural diversity of First Nations in BC.	✓	✓	✓	✓	✓		2007 – Annually
327	CONSUMER SHOW EXHIBITS – ATBC to exhibit in at the Consumer Travel Shows in Canada (Toronto, Vancouver) and the US (San Francisco, Chicago, New York). The focus is to introduce Aboriginal tour operators at the show and to provide them with the opportunity to be part of the tourism product cluster.			✓	✓	✓		2007 – Annually
340	BC TOURISM INDUSTRY CONFERENCE PARTNERSHIP							
341	BC-ABORIGINAL TOURISM INDUSTRY CONFERENCE PLANNING – Have an Aboriginal tourism representative on the BC Tourism Industry Conference planning committee. Identify critical planning deadlines for the BC Tourism industry conference and ensure the Aboriginal Tourism pre-Conference implementation plan responds to / is compatible with those deadlines. Host the event annually.	✓			✓	✓	*	Annually, every Feb
342	ABORIGINAL TOURISM CONFERENCE PROPOSAL – Develop an Aboriginal Tourism Conference plan and funding proposal and solicit funding sponsors.				✓	✓	*	
343	TOPIC AND SPEAKER IDEAS – Canvas Aboriginal tourism on desired topics and speakers for the Aboriginal Tourism pre-conference.					✓	*	Annually – Mar-Apr
344	MATCH MAKING SERVICE – Set up a 'matchmaking' service for Aboriginal and Non-Aboriginal tourism operators and travel trade.	✓	✓		✓	✓	*	
345	AWARDS – Develop an award to be presented annually to the best First Nations/Non-First Nations tourism business partnership or promotion and the best media coverage of an Aboriginal tourism experience.	✓	✓	✓	✓	✓	*	Annually
347	ABORIGINAL TOURISM PRE-CONFERENCE EVENT – Launch the annual Aboriginal tourism Pre-Conference and have ATBC attend the BC Tourism Industry Conference.				✓	✓	*	

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
348	ABORIGINAL EXHIBIT – Coordinate an Aboriginal cultural tourism exhibit promotion of First Nations culture and Aboriginal tourism products for the BC Tourism Industry Conference.	✓			✓	✓	*	Annually, every Feb
350	PARTNERSHIP EXPLORATION							
351	JAPANESE PARTNERSHIP EXPLORATION – Explore partnerships with Japanese local ground operator and their clients in Japan to promote First Nations market ready packages to visitors at Japan's Expo 2005.		✓	✓			*	
352	RECEPTIVE TOUR COOPERATIVE MARKETING PARTNERSHIPS – Develop cooperative marketing partnerships with Receptive Tour Operators that work with the German, UK, and Japanese markets, to focus more efforts on contracting and promoting market ready Aboriginal cultural tourism products. These partnerships could also incorporate their partners in the market to ensure that the consumer is presented with images of BC in brochures, advertising, online and through contests and promotions that contains Aboriginal culture and create a desire to book the vacation.	✓			✓	✓		2007 – Annually
353	MARKET READY PARTNERSHIP DEVELOPMENT – Encourage and support market ready Aboriginal cultural tourism suppliers to develop more interactive and multiple focus experiences that can be promoted to special interest groups.				✓	✓	*	Ongoing
354	OTHER COMMUNICATIONS – Communication with economic development officers and tourism groups such as COTA, business associations, etc. in regards to Aboriginal cultural tourism products.				✓	✓	*	Ongoing
361	SPECIAL INTEREST TOUR COOPERATIVE MARKETING PARTNERSHIPS – Develop cooperative marketing partnerships with Special Interest Tour Operators in Canada, the US and overseas that have a client base that is interested in culture and art and would be drawn to an Aboriginal cultural tourism program that provided an in-depth exploration of the Aboriginal culture, either related to art, nature, spirituality, cuisine, legends, history, etc. These partnerships could also incorporate clubs, universities, museums and other organizations that have clients interested in in-depth learning travel programs related to Aboriginal culture.	✓			✓	✓		2007 – Annually
400	Media Relations							
410	MEDIA RELATIONS SPECIALIST – ATBC to contract a media relation's specialist to develop media relationships and nurture unpaid media. This will include working closely with the TBC media relations team to promote Aboriginal themed story ideas to media in Canada, US, and international markets, as well as assist media with visits to Aboriginal experiences.		✓		✓	✓	*	Ongoing
411	MEDIA RESOURCE TOOLS – Develop resource tools for media: Image CD's, 'B' roll footage, story ideas, list of interesting characters to interview, so that it is easier for the media to incorporate Aboriginal cultural experiences in their message.		✓					2007 – Ongoing
412	STORY IDEAS – Prepare story ideas for media focused on Aboriginal cultural tourism experiences. Work with TBC to promote Aboriginal themed story ideas to media in Canada, US, Europe and Asia-Pacific markets.		✓		✓	✓	*	Ongoing

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
413	PRESS RELEASE DISTRIBUTION – Distribute regular press releases with themed topics suited to various audiences. Promotion of Aboriginal cultural events and market ready experiences to local and regional print and electronic media.		✓		✓	✓	Ongoing	
414	TOURISM BC DISTRIBUTION CHANNELS – Assist businesses package market ready Aboriginal experiences with accommodation properties to be sold through the BC Escapes Guide, Hello BC website and other channels.			✓			*	ongoing
415	EVENT PROMOTION – Promotion of Aboriginal cultural events and market ready experiences to local and regional print and electronic media.		✓		✓	✓		Ongoing
420	MEDIA FAM TOURS – Coordinate familiarization tours to experience Aboriginal cultural tourism experiences for media and TBC (including media relations staff), Tourism Vancouver, CTC and VANOC media staff.		✓		✓	✓	*	Annually: Apr, May, June, Aug, Sep, Oct
430	MEDIA MARKETPLACE ATTENDANCE – Annual participation by ATBC at Media Marketplace in New York City (Apr 2006) and Go Media (May 2006).		✓		✓	✓	*	Annually, Apr – May
440	OLYMPIC GAMES MEDIA PROMOTIONS –VANOC to position Aboriginal culture as a consistent element in the visual message that is relayed to the world by television networks before and during the 2010 Olympics and Paralympics. Ways this can be done include the portrayal of art, traditionally prepared foods, language, dance, drumming, storytelling, spiritual, wildlife and nature interpretation tied to legends, weaving, drum making, etc.	✓	✓	✓	✓	✓		2007 – 2010
500	Product Development							
510	ABORIGINAL CULTURAL TOURISM PRODUCT DEVELOPMENT – Encourage and support market ready Aboriginal cultural tourism suppliers to develop more interactive and multiple focus experiences that can be promoted to special interest groups.				✓	✓	*	
511	ASSESS TOUR OPERATOR ABORIGINAL PRODUCT PACKAGING – Communicate with all receptive tour operators selling BC to determine what BC Aboriginal product they currently feature, and determine opportunities to promote additional products as part of their ad hoc group or FIT programs for 2006 and beyond.	✓			✓		*	
512	ACCOMMODATION PACKAGES – Facilitate the creation of accommodation packages that include Aboriginal tourism experiences for promotion in the BC Escapes program in western US.			✓	✓	✓	*	2007 – Annually
520	WELCOME SIGN INSTALLATION – Installation of entrance welcome signs in each First Nation's traditional language.			✓		✓		2008
530	MARKET READY STANDARDS – Meld the ATBC market ready standards with TBC's export ready standards to create one set of market ready standards acceptable to both organizations. Post updated standards on ATBC website and announce in quarterly newsletter.				✓	✓	*	

	Activity	Tour Operators	Media	Independent Travellers	TBC, RDMO's, INAC, ABC and Other Agencies	Aboriginal Tourism Businesses and Communities	Short Term (March 2006-February 2007)	Medium / Long Term
531	<p>QUALITY ASSURANCE PROGRAM – Develop a quality assurance program for Aboriginal cultural tourism suppliers that are market ready, which will provide tour operators with the confidence to promote the experience. A model for this could be Tourism New Brunswick's 'Trade Smart' quality assurance program. This program would be a benefit for all suppliers in the province and a modified program for Aboriginal cultural tourism suppliers could be developed to meet their unique needs. This program is highly regarded by the international tourism industry and suppliers carrying the 'Trade Smart' quality assurance brand are trusted by tour operators (and consumers) that know the brand.</p>	✓	✓	✓	✓	✓		2007

11. Blueprint Strategy Implementation

Effective implementation of the Aboriginal Cultural Tourism Blueprint Strategy for British Columbia requires a commitment of at least five years by the key players, especially governments, and organizations that are mandated to develop tourism. First Nations communities, Aboriginal businesses and economic development organizations must also be fully committed to the Blueprint Strategy. The program should begin as soon as possible to benefit from the energy associated with strengthening British Columbia's tourism industry in preparation for the 2010 Olympic and Paralympic Winter Games and the marketing campaigns that will also be executed to capitalize on the 'Olympic spirit'.

This momentum should carry into the long term strategy that involves the creation of program support agreements by various agencies and organizations that 'sign on' to the Blueprint Strategy and its implementation program. Partner organizations are recommended to be the Aboriginal cultural tourism industry (represented by ATBC) and appropriate Federal and/or Provincial agencies. The Partners would create an Implementation Coordination Committee (ICC) to deliver the strategy. The committee would include approved First Nation representatives that are recognized by the lead First Nation organizations in British Columbia (e.g., Assembly of First Nations, Union of BC Indian Chiefs, First Nations Summit). Participating agencies and organizations would be approached to assist with program delivery, adapting programs as appropriate for application in implementing this strategy.

11.1 Organizing for Implementation

We recommend organizing the implementation of the Blueprint Strategy generally by the organizing framework recommended in **Section 7**, which reflects the recommended Aboriginal product tiers:

- Tier 1 - new and start-up businesses;
- Tier 2 - existing but not market ready businesses; and
- Tier 3 - market ready businesses.

The recommended action steps for the overall strategy and each of the product groupings are shown in **Exhibit 11.1**. Once the strategy is confirmed by partner agencies, there are a number of mobilization tasks that are common to each of the three components and essentially for part of the "infrastructure" for program delivery by each of the product groupings, the first is the establishment of an Implementation Coordination Committee.

11.1.1 Overall Program Delivery

Several tasks are necessary to establish the basic infrastructure to proceed with implementation. The priority is on creation of a partner agency agreement and an Implementation Coordination Committee that would guide the execution of the program. A first item for implementation is communications to inform the Aboriginal cultural tourism community, First Nations and the industry, as well as other industry stakeholders about the Aboriginal Cultural Tourism Blueprint Strategy for British Columbia and how it will be carried out. Briefing sessions should be held in all regions of the province as well as with government agencies. A website should also be developed to post the strategy in order to facilitate communications, and for interested agencies, organizations and individuals to follow-up on research.

Descriptions of each of the overall program delivery items with suggested time periods for implementation are provided in **Exhibit 11.1**. Key components of this strategy include the tasks listed below.

Exhibit 11.1: Implementation Structure and Action Tasks

Overall Program Delivery		
<ol style="list-style-type: none"> 1. Finalize Partner Agency Agreement. 2. Establish Implementation Coordination Committee. 3. Assemble inventory of Aboriginal cultural tourism product by type (start-up, existing but not market ready, market ready) including mechanisms for updating and development and decide on performance measures and complete financial and economic impact profile for the Aboriginal cultural tourism sector. 4. Prepare and execute communications and staffing plan for the Aboriginal Cultural Tourism Blueprint Strategy. 5. Initiate Aboriginal Cultural Tourism 2010 Olympic and Paralympic Winter Games Strategy. 6. Prepare web-based resource centre providing access for Aboriginal cultural tourism operators, entrepreneurs, communities, with dedicated sections for travel trade and media. 7. Prepare toolkits for communities and entrepreneurs providing guidance on incorporating cultural content / experiences into their proposed tourism products. 8. Research, design and implement hospitality word mark for destination. 		
Tier 1 - Start-up Products	Tier 2 - Existing but Not Market Ready	Tier 3 - Market Ready Products
<ol style="list-style-type: none"> 9. Identify and negotiate program delivery support agreements with appropriate agencies for coaching / mentoring, business start-up planning, and training ranging from hospitality to tourism management and operations. 10. Identify and negotiate program delivery support agreements for delivering community awareness and community tourism development programs. 11. Prepare community tourism toolkits. 12. Ongoing coordination and monitoring of program delivery effectiveness in collaboration with participating agencies. 	<ol style="list-style-type: none"> 13. Identify and negotiate program delivery support agreements for training, business planning, marketing and operations, financing and a mentoring program. 14. Prepare toolkits for entrepreneurs seeking advice on cultural tourism product development. 15. Ongoing coordination and monitoring of program delivery effectiveness in collaboration with participating agencies. 16. Develop a list of existing Aboriginal cultural tourism businesses and assess their level of market readiness. Develop a strategy for assisting these businesses to become market ready and determine the level of coaching / mentoring services required. 	<ol style="list-style-type: none"> 17. Develop and communicate ATBC's market-ready standards for Aboriginal Cultural tourism products. 18. Assess each market ready product against the market ready standard and identify businesses for immediate incorporation into the marketing program. 19. Implement marketing action plan.

1. Establishing an Implementation Partner's Agreement with ATBC as the Lead Partner. This relationship would then engage the involvement and endorsement of the First Nations of BC as 'partner' and relevant Federal and Provincial agencies. It is imperative that the First Nations of BC participate in and endorse this initiative.
2. Creating an Implementation Coordinating Committee (ICC). The intent of the ICC is to work with participating agencies to assist with effective program delivery, give direction to the

implementation team as required, monitor implementation and provide recommendations to the partner organizations on adjustments that should be made to implementation. It is expected that the ICC would meet three times per year.

3. Assembling an inventory of Aboriginal cultural tourism product by type (start-up, existing but not market ready, market ready) that will define the status of Aboriginal cultural tourism businesses (e.g., including numbers and types of organizations and where they are likely to fit in the recommended product groupings defined in this strategy.) This inventory database should be made available to all participating agencies assisting in program delivery. Concurrent with this inventory, performance measurement mechanisms as suggested in **Section 7.2.2** should be designed and used on an ongoing basis.
4. Developing and implementing a communications plan for the strategy is critical to ensure that all stakeholders are made aware of the strategy and have sufficient access for their need to information concerning the strategy itself and implementation. An important feature of the communications plan will be a specific awareness program for staff of relevant Federal and Provincial agencies, Aboriginal cultural tourism operators and First Nations' stakeholders to ensure that the partners are fully apprised of the roles, responsibilities, benefits and rationale associated with the strategy. The communications strategy should be supported by a web-based information resource for all participants and stakeholders in the development of the strategy, where news, progress reports, and strategy materials are posted.
5. Implementing the Aboriginal 2010 Olympic and Paralympic Winter Games tourism strategy. The short term activities for mobilization of this strategy are described in detail in **Section 7.2.2**.
6. Developing tool kits for communities and entrepreneurs that provide guidance on cultural tourism programs. These toolkits will need to be developed as part of the overall program delivery, be made available to all Aboriginal cultural tourism businesses, as well as communities interested in pursuing tourism ventures.
7. Developing a web resource centre for Aboriginal tourism. This web resource centre should provide a "virtual" resource library for all stakeholders involved in Aboriginal cultural tourism strategy implementation ranging from communities to individual businesses and agencies participating in implementation. At a minimum, it should include the following information:
 - a description of the Aboriginal cultural tourism strategy;
 - an inventory of Aboriginal cultural tourism businesses by product grouping type;
 - training programs;
 - toolkits for communities and entrepreneurs on cultural experiences (see Item 4 above);
 - First Nation and Aboriginal terminology;
 - profiles of the First Nations in British Columbia and an overview of the First Nations, Inuit and Métis of Canada;
 - the 2010 Olympic and Paralympic Winter Games tourism strategy for Aboriginal tourism;
 - for the travel trade – images (along with directions for their use) and text suitable for inclusion in brochures and media articles as well as guidelines and policies on use;

- ‘how-to’ manuals for tourism business operations and management; and
 - information on industry standards and codes of conduct, ethics in terms of tourism services delivery.
8. The website will be a fundamental support resource for the Aboriginal cultural tourism strategy. As such, it should be regularly reviewed by the Implementing Coordinating Committee to ensure relevance, and to enrich the site with resources matched to Aboriginal cultural tourism business and community needs. There should also be components of the site that are updated regularly so that site visitors will be encouraged to regularly revisit the website.
9. Assessing the potential application of the proposed welcoming word mark for destination marketing use. Develop an appropriate strategy and program for integrating this “welcoming” concept into Federal and Provincial destination marketing activities.

11.1.2 Tier 1 – New, Start-Up Businesses

These new, start-up businesses will typically be found in Aboriginal communities interested in pursuing tourism (with individual operators / entrepreneurs seeking to open new tourism businesses), and as spin-offs of existing tourism businesses. Several programs are important to support this product grouping ranging from community tourism awareness to coaching and mentoring. The activities are described below.

- In the start-up business area, there are a variety of agencies involved in delivery of technical assistance and support programs. The ICC should collaborate with these agencies to identify and negotiate how they may participate in the Aboriginal cultural tourism strategy (programs, budgets and timelines). This should include the following key areas required for technical assistance:
 - coaching / mentoring for start-up businesses to help them through the initial stages of business concept, business planning, incorporation, market assessments, operations and management including development of cultural experiences and content;
 - training programs (preferably provided in workshop settings in their locales) on operations and management and business planning for projects;
 - referrals to specialists who can help individual entrepreneurs with specific technical requirements (e.g., architecture, resource management, etc.); and
 - technology assistance including the development of websites.
- The second key area for start-up products relates to the involvement of communities in tourism. Here, the ICC should identify and negotiate program delivery with stakeholder agencies for community tourism awareness and community tourism development programs specific to this strategy. These should include:
 - the preparation of community tourism toolkits that can be used by coaches and mentors in the communities and can be accessed by communities to assist them in the development of appropriate tourism sector participation. These toolkits can be developed from adaptations of existing community tourism program material, such as those produced by TBC and similar agencies. They should be adapted specifically for Aboriginal cultural tourism and should incorporate materials specific to market expectations and needs and the definition of market ready product and “how to get there”; and
 - ongoing coordination and monitoring of program delivery effectiveness in collaboration with participating agencies.

11.1.3 Tier 2 – Existing But Not Market Ready Businesses

The actions required for this product grouping are similar to those of start-up products but with a different emphasis. For existing Aboriginal cultural tourism businesses, a variety of training programs are already available, most of which could be used without significant adaptation. We believe, however, that a mentoring program should also be made available for this program. It will help existing businesses focus on determining the operational and product gaps that they must address in order to reach market ready status and to facilitate their entry into more expansive tourism markets. The activities include the tasks listed below.

- Identification and negotiation by the ICC of program delivery support agreements (programs, budgets and timing) with stakeholder agencies that already provide various support programs for both Aboriginal and / or mainstream tourism communities. This includes training, business planning, marketing and operations assistance, financing and mentoring for existing entrepreneurs.
- Preparation and / or adaptation of toolkits for entrepreneurs in the following areas:
 - providing mainstream tourism and business management and operations information;
 - preparing for market ready status including training programs specifically associated with this process (e.g., how to deal with tour operators, etc.);
 - incorporating cultural experiences and / or enhance cultural experience content in their tourism products;
 - offering referrals to mainstream tourism support organizations where entrepreneurs elect not to incorporate cultural experiences in their products; and
 - ongoing coordination and monitoring of delivery effectiveness in collaboration with participating agencies delivering program support.

11.1.4 Tier 3 – Market Ready Businesses

The focus in this group is on promoting businesses that are market ready and can be publicized through British Columbia's mainstream marketing mechanisms, as well as initiatives that help them maintain their market position. Several activities are required.

- Define and publish the standards for Aboriginal cultural tourism “market ready” products. This involves integrating TBC's market ready standards with the provisions for market ready products developed by Aboriginal communities. These should be combined, approved by the participating partners, made available during the communications program and concurrently published on the web resource centre. Briefings should be held at appropriate venues for the travel trade and media. The resulting market ready standard for Aboriginal cultural tourism products is essentially the Aboriginal cultural tourism “product brand” for products incorporating cultural content / experiences.
- Provide and ensure access to coaching / mentoring services so that product and marketing expansion can more successfully occur, and that businesses are able to maintain and heighten product and market positions.
- Undertake an assessment process for each market ready business to determine its consistency with the market ready standard based on the inventory of Aboriginal cultural tourism businesses developed in the overall program delivery activities described above. Identify those that meet or exceed the market ready standard and can be immediately incorporated into TBC's marketing programs.

- Implement the Short Term Marketing Strategy as specified in **Section 0**.

11.2 Implementation Schedule

The proposed schedule for implementation is summarized in **Exhibit 11.2**. It assumes a major effort on several fronts during the first year to put the mechanisms in place for implementation of programs for Start-up, Existing But Not Market Ready and Market Ready businesses and products. The table also includes schedules for the Aboriginal 2010 Olympics and Paralympics Tourism Strategy and the Marketing Strategy.

Exhibit 11.2: Implementation Schedule

Activity	2006: Mobilization (Quarters)				Year			
	1/4	2/4	3/4	4/4	2007	2008	2009	2010
Overall Program Delivery								
1. Negotiate lead partners agreement								
2. Establish Implementation Coordination committee								
3. Assemble inventory of Aboriginal cultural tourism product								
4. Develop / Implement communications plan								
5. Develop / Implement Aboriginal Winter Games strategy								
6. Prepare web-based resource centre								
7. Prepare toolkits on cultural content / experiences								
8. Research, design and implement word mark program								
Start-up Products								
9. Identify / Negotiate program delivery support for coaching, training and business support services								
10. Identify / Negotiate program delivery support for community awareness / tourism development programs								
11. Prepare community tourism toolkits								
12. Ongoing coordination and collaboration with participating agencies								
Existing But Not Market Ready Products								
13. Identify / Negotiate program delivery support for mentoring, training and business support services								
14. Prepare cultural experiences toolkits								
15. Ongoing coordination and collaboration with participating agencies								
16. Inventory of existing Aboriginal businesses								
Market Ready Products								
17. Finalize market ready standards								
18. Assess existing product and incorporate market ready product into TBC marketing programs								
19. Implement short term marketing action plan								
Aboriginal 2010 Olympic and Paralympic Winter Games Strategy								
20. ACTWOW Committee set up								
21. First Nations approval for committee set up								
22. Terms of Reference Development								
23. Plans implementation								
MARKETING PROGRAM								
Collateral / Marketing Materials Creation and Distribution								
24. Aboriginal cultural tourism publication								
25. German and other languages publications								
26. 2010 Winter Games Brochures								
27. ATBC Quarterly newsletter for members and suppliers								

Activity	2006: Mobilization (Quarters)				Year			
	1/4	2/4	3/4	4/4	2007	2008	2009	2010
28. Marketing resource materials and image databank								
Advertising and Promotions								
29. Display advertisements								
30. Featured brand images								
31. Outdoor guide								
32. International publication display ads								
33. Special events promotion advertising								
34. 2010 Winter Games images								
35. Gateway location advertising								
36. Advertising program awareness								
37. ATBC AGM and Awards								
38. E-marketing program								
39. ATBC website-media, library, images								
40. Aboriginal cultural experiences website								
41. TBC web pages and e-newsletter								
42. 2010 Aboriginal winter games website								
Industry / Trade / Public Relations								
43. Tour operator communications program development								
44. Germany promotion								
45. Awareness workshops								
46. Cultural protection protocols information								
47. Hello BC Call Centre staff presentations								
48. TBC sales staff education								
49. Aboriginal themed fam tours for travel trade								
50. Rendezvous Canada booth								
51. Canada's West marketplace								
52. Tour operator marketplace promotion								
53. Exhibit partnership								
54. International marketplace promotion								
55. International show presence								
56. Consumer show exhibits								
57. BC Tourism Industry Conference partnership								
58. Partnership exploration – Japan market								
59. Receptive tour cooperative marketing partnerships								
60. Market ready partnership development								
61. Special interest tour marketing partnerships								
62. Other communications								
Media Relations								
63. Media relations specialist								
64. Media resource tools								
65. Story ideas								
66. Press release distribution, event promotion								
67. TBC editorials								
68. Media familiarization tours								
69. Olympic Games Media Promotions								
Other and Product Development								
70. Aboriginal cultural tourism product development								
71. Assess tour operator Aboriginal product packaging								
72. Accommodation packages								
73. Welcome sign installation								
74. Market ready standards								
75. Quality assurance program								

11.2.1 Marketing Program

The Marketing Program outlined in **Section 10** is recommended to support the implementation strategy and provide the infrastructure to effectively build awareness, interest and sales of Aboriginal cultural tourism as part of TBC's overall marketing program. In close cooperation with ATBC and

the Aboriginal cultural tourism industry, TBC will play an important role in introducing the Aboriginal cultural tourism experience to international markets, as well as helping to create awareness of tourism and its benefits within Aboriginal communities.

The implementation sequence (short, medium and long term) for the marketing program is directed by the market cycles. Independent travellers vary in the amount of lead time required between the time they plan and book their vacation to when they actually travel. This can be as much as nine months, to as little as within one week of the travel date. It tends to be that the further away the visitor is, the more lead time between the booking and travel date. And, the further away they are, the more likely they will use an intermediary (travel agent, tour operator) to assist them with their travel planning and booking.

The time frame between the contracting of services and development of new packages by the receptive and tour operators and the eventual sale of the product to the traveller is generally a minimum of one year. In some markets, the development period is even longer.

In order to ‘win over the tour operators’ as partners in promoting Aboriginal tourism, the Aboriginal cultural tourism sector in British Columbia must deliver a quality, interpretive experience and be in a position to provide rates and details of their products to their tour operator partners within their planning cycle. Without this capacity, the ability for Aboriginal cultural tourism to gain credibility will be seriously impacted.

11.3 Mobilization for the 2010 Olympic and Paralympic Winter Games

The 2010 Olympic and Paralympic Winter Games provide a superb opportunity for Aboriginal tourism, provided the Aboriginal cultural tourism products are of consistent quality and the plans are well executed. The recommended activities for mobilization are described in **Section 9.1**. Once mobilization is complete, it is expected that longer-term implementation leading up to the Winter Games will be put in place as part of a long term implementation program (see **Section 11.2**).

The first step in mobilizing for the Games is the creation of the Aboriginal Cultural Tourism Winter Olympics Working Committee and ensuring this approach is acceptable to the Winter Games host First Nations (e.g., Squamish, Lil’wat, Tsleil-Waututh and Musqueam). The ACTWOW is the group responsible for refining the Aboriginal cultural tourism participation strategy related to the Games, building connections with stakeholders and resource suppliers, liaising with the ICC and implementing the Aboriginal Winter Games strategy.

11.4 Monitoring Implementation

Monitoring implementation of the strategy requires diligent, ongoing attention and data collection. The implementation team will need to ensure that appropriate data are assembled and monitoring reports prepared in accordance with the monitoring system design. This effort will provide the insight and data necessary to consider implementation program adjustments to enhance effectiveness.

A useful technique to support both monitoring and communications requirements for the strategy is hosting of an Annual Review Conference to identify issues, concerns and opportunities that are not explicitly addressed in the strategy and should be considered for implementation in subsequent years.

The performance indicators listed in **Exhibit 7.2** and **Exhibit 7.3** provide the guidance to the Annual Review Conference participants in determining what steps are necessary to achieve the goals and objectives outlined in this strategy (see **Section 7.2**).

Appendix A: First Nation and Aboriginal Terminology

There are several terms used in Canada to describe the Indigenous people and nations. The following is a guide to more of the common terms used. The terms have been adapted from commonly used terminology lists. Common names used to describe the original peoples of North America are:

- Aboriginal people(s)
- First Peoples
- Indigenous people(s)
- Native people(s)
- Native American
- American Indian

More narrowly defined groups of Aboriginal people:

- First Nation
- Indian
- Innu
- Métis
- Eskimo
- Inuit/Inuk

Terms associated with communities and community organization:

- Among First Nations:
 - Band
 - tribal council
 - tribe
 - reservation
 - reserve
 - communities
 - village
- Among Inuit
 - Inuit communities
 - Inuit regions

- American usage:
 - American Indian
 - Native American
 - Eskimo
 - reservation
 - tribe
 - Aboriginal people(s)

“Aboriginal people” is a collective name for the original peoples of North America and their descendants. The Canadian Constitution (the Constitution Act, 1982) recognizes three groups of Aboriginal peoples — Indians, Métis and Inuit.

Aboriginal people – is used when you are referring to “Aboriginal people”, you are referring to all the Aboriginal people in Canada collectively, without regard to their separate origins and identities. Or, you are simply referring to more than one Aboriginal person.

Aboriginal peoples – by adding the ‘s’ to people, you are emphasizing that there is a diversity of people within the group known as Aboriginal people.

non-Aboriginal people (not peoples) – refers to anyone who is not an Aboriginal person. Note that the ‘non’ stays lowercase.

Band – is a body of Indians for whose collective use and benefit lands have been set apart, or money is held by the Crown (federal government), or declared to be a Band for the purposes of the Indian Act. Most bands today prefer to be known as First Nations (e.g., Musqueam First Nation).

Band Council – is the governing body for a Band. It usually consists of a chief and councillors, who may be elected or in Bands that have established using their own governing processes.

Aboriginal Nations – defined by the Royal Commission on Aboriginal Peoples (RCAP) in its final report, it means “a sizeable body of Aboriginal people with a shared sense of national identity that constitutes the predominant population in a certain territory or collection of territories.”

First Nation – is used to refer to a Band or all the Bands that share the same geographic, political or cultural and linguistic lines (and people descending from that cultural group). First Nation is often used to reinforce Indigenous rights and titles, as well as the right of a people to govern themselves.

Indian – collectively describes all the Indigenous people in Canada who are not Inuit or Métis, and otherwise recognized as Aboriginal in the Constitution Act, 1982, that specifies that Aboriginal people in Canada consist of the Indian, Inuit and Métis peoples. There are three categories of Indians in Canada: Status Indians, Non-Status Indians and Treaty Indians.

- **Status Indians** – Status Indians are people who are entitled to have their names included on the Indian Register, an official list maintained by the federal government. Specific criteria outline who can be registered as a Status Indian. Only Status Indians are recognized as Indians under the Indian Act, which defines an Indian as “a person who, pursuant to this Act, is registered as an Indian or is entitled to be registered as an Indian.” And therefore, only Status Indians are entitled to certain rights and benefits under the law.

- **Non-Status Indians** – are people who consider themselves Indians or members of a First Nation but whom the Government of Canada does not recognize as Indians under the Indian Act, either because they are unable to prove their status or have lost their status rights. Non-Status Indians are not entitled to the same rights and benefits available to Status Indians; however, they may be eligible for programs designated for Aboriginal people (this includes Métis and Inuit people).
- **Treaty Indian** – is a Status Indian who belongs to a First Nation that signed a treaty with the Crown. In British Columbia, the majority of First Nations have not signed treaties.

The term “Indian” is considered outdated, however, it is used when referring to the “Indian Act” which is the act that the Crown uses to govern Indians. The common term used is “First Nation”, instead of “Indian” except when using the term “Indian”:

- in direct quotations
- when citing titles of books, works of art, etc.
- in discussions of history where necessary for clarity and accuracy
- in discussions of some legal / constitutional matters requiring precision in terminology
- in discussions of rights and benefits provided on the basis of “Indian” status
- in statistical information collected using these categories (e.g., the Census)

Capitalize – “Indian,” “Status Indian,” “Non-Status Indian,” and “Treaty Indian”. The term is acceptable as both a noun and a modifier.

Tribal Council – is a group made up of several Bands that represents the interests of those Bands and may administer funds or deliver common services to those Bands. Membership in a tribal council tends to be organized around geographic, political, or cultural and linguistic lines.

Appendix B: Aboriginal Focus Group Questions

Participant Qualifications

The following qualifications of participants for focus groups sessions were:

- 1) Must be residing in British Columbia; and
- 2) Owning or working for an entity that operates in British Columbia; and
- 3) a) Must be a majority Aboriginal owned tourism business located in British Columbia, AND selling a tourism product directly to the consumer; OR
 - b) Responsible for business development and / or planning for a First Nation or Aboriginal organization that represents First Nations or Métis or Inuit, and is involved with planning or assessing tourism as a means for community economic and / or cultural development; OR
 - c) A “Cultural Keeper” that may be an Elder, cultural Advisor or other person, that is or has been involved with planning or approving cultural development for tourism; OR
 - d) A person who is considered to be a key influencer in community economic development and / or tourism and / or Aboriginal culture that is felt should attend.

People not qualifying were – “a person who is not residing or living in British Columbia” or “An individual who is considering or exploring starting a tourism business and is not qualified to be considered under section 3b or 3c or 3d listed above.”

Questions

#	Question	Theme	Purpose / Desired-Expected Outcome
1	What do you see as the benefits and negatives of tourism and cultural tourism to Aboriginals? Let’s list 10.	Tourism development	Understanding of challenges that need to be overcome for further development. Confirmation of the benefits of tourism... an easy opening question.
2	Is your community (or do you know of Aboriginal communities) already participating in or considering tourism and cultural tourism? <i>Question below only asked if #6 is no.</i> Why are they not pursuing the development of tourism or cultural tourism?	Community issues	Understand community issues and needs to further community and cultural development.

#	Question	Theme	Purpose / Desired-Expected Outcome
3	<p>These are the market opportunities / findings... [INFORMATION PRESENTED]</p> <p>a) What types of Aboriginal tourism products should be developed in BC (e.g., ecotourism, cultural, accommodation, arts and crafts)?</p> <p>b) Of these, which present the greatest opportunities to incorporate culture?</p> <p>c) If you could only focus on 3 areas, what would they be? And, in what order?</p> <p>d) Cultural tourism, such as... is identified as a good opportunity for First Nations and Aboriginals. The type of cultural experience offered varies from one type of tourism offering to another. The number of Aboriginal cultural offerings in BC currently marketed to the tourism industry could be developed further. In your opinion, why are they not more developed?</p>	Product-Market match – includes cultural development	What resources are needed Who should be involved - Priorities for development and rationale - Issues affecting further development of cultural opportunities
4	<p>What is needed to support Aboriginal cultural tourism development in BC in the following areas:</p> <p>a) Education b) Training c) Marketing d) Business skill development e) Financing f) Cultural g) Community development</p> <p>What do you see as the three most important areas? How would you develop these?</p>	Support services for industry strategy Community	Determine the priorities Information for strategy development, tools, resource and access needs.
5	<p>What can be done to encourage greater involvement of Aboriginal entrepreneurs in the tourism industry?</p>	Product development	Ideas on how to increase individual involvement in tourism for long term growth.
6	<p>What agencies and organization do you know of that are involved or should be involved in Aboriginal tourism or cultural development?</p> <p>a) What should their role be? b) What is missing?</p>	Support Support services for industry strategy	Understand the level of knowledge of the agencies. Collect views and ideas on who should be involved and what their role should be.
7	<p>What marketing / sales activities does your community / organization currently participate in to support tourism growth in your community:</p> <p>a) Website b) Brochure c) Advertising d) Familiarization tours e) Package development f) Work with tour operators g) Tradeshows / marketplaces h) Tourism / hospitality training i) Tourism organization memberships j) Others: (Describe)</p>	Marketing and Sales	Determine level of marketing and sales activity currently being undertaken in the province by the businesses within the communities as well as the destinations in support of Aboriginal tourism.

Appendix C: Regional Sessions Attendance List

Mission

Linnea Battel, Xa:ytem, Mission
Alex Chartrand, Wuikinuxv Nation, Port Hardy
Ann Corner, Fort Langley National Historic Site, Fort
Langley
Bonnie Dubrulle, Fleur de Sel Bed & Breakfast,
Mission
Sandra Goosen, Spirit of Mission 2010, Mission
Arlene Keis, GO2, Surrey
Leonard Laboucan, Wild Spirit Company & United
Native Nations, Burnaby
John Leschyson, GO2, Surrey
Debbie Nelson, OKNTC, Bella Coola
Brian Payer, Tsawwassen
Allan Serwa, Advance Communications, Mission
Dawson Simmonds, Hemlock House
Leslie Skinner, Canadian Tourism College, Surrey
Mel Worder, Spirit of Mission 2010 & Four Seasons
Travel, Mission
Allanah Young, FMIZ / UBC, Vancouver

Prince Rupert

Kenneth Adams, Student NWCC, Prince Rupert
Wilfred Bennett, First Nations Training & DW
Centre, Prince Rupert
Amy Bolton, Student NWCC, Prince Rupert
John Cecil, Gitmaxmak'ay Nisga'a Society, Prince
Rupert
Jennifer Davidson, Prince Rupert
Delivina Delill, Salmon Berry Home Stay, Port
Edward
Steven Dennis, Lax Kw'alaams Band, Port Simpson
Marilou DeVerd, First Nations Training & DW
Centre, Prince Rupert
Raelene Dudowald, First Nations Training & DW
Centre, Prince Rupert
Steven Evans, NWCC, Prince Rupert
Ernie Gerow, Kitsumkaum Band, Terrace
Pam Groves, NWCC, Prince Rupert
Clarence Innes, Kitkatla
Ray Jones, Gitysan Treaty Society, Hazelton
Eddie Kitt, Local Person, Prince Rupert
Jerry Lawson, Lax Kw'alaams, Port Simpson
Todd Lemine, Community Futures of the Pacific
Northwest, Prince Rupert
Bob Lipsett, NWCC
Monique McMillian, Native Education Centre &
Aboriginal Tourism Management, Prince Rupert
Corinna Morhart, Prince Rupert
Jean Nelson, First Nations Training & DW Centre,
Prince Rupert
Lorraine Nyce, NWCC, Prince Rupert
Paula Peinsznski, 16137 Community Futures
Development Corporation, Terrace

Prince Rupert (continued)

Patricia Robinson, First Nations Training & DW
Centre, Prince Rupert
Steven Sankey, Prince Rupert
Jo Scott, Salmon Berry Home Stay, Prince Rupert
Jennifer Spencer, Prince Rupert
Mary Stewart, NWCC, Prince Rupert
Ester Stewart, Tourism Prince Rupert, Prince Rupert
Delores Tolmie, First Nations Training & DW
Centre, Prince Rupert
Matt Vickers, Gitksan Government Commission,
Hazelton
Margaret White, First Nations Training & DW
Centre, Prince Rupert
Edward Wilson, Laxkwalaams & Nisga'a Dancer,
Prince Rupert
Darlene Wolfe, First Nations Training & DW Centre,
Prince Rupert
Lorraine Woods, Prince Rupert

Kamloops

Ida-Anne Alexander, ACED SFU Student, Enderby
Stephen Ameyaw, SFU / NVIT Degree Program,
Merritt
Leigh Anderson, Squilax
Gary Arnold, Upper Nicola, Merritt
Fred Arnouse, Chase
Victor Bell, VB INC., Chase
Kris Billy, SFU / NVIT, Merritt
Nadine Bob, CFDC of CFFN, Lillooet
Evelyn Camille, Kamloops Indian Band Councillor,
Kamloops
Charlie Carusi, Kamloops
L. Opal Charters, Upper Nicola Band N'Kwala
School, Merritt
Wayne Daniels, ACED SFU Student, Merritt
Rhonda Dunn, SFU / NVIT, Merritt
Calvin Eustache, Louis Creek
James Fountain, Nooaitch Indian Band, Merritt
Marilyn Groves, ACED SFU Student, Merritt
Howard Holmes, Upper Nicola Band, Merritt
Loretta Holmes, Upper Nicola Band, Merritt
Garry Lafferty, Merritt
Robert Lafferty, SFU / NVIT Lower Nicola Band,
Merritt
Christina Lutterman, Quaaout Resort, Chase
Teresa Maitland, SFU / NVIT ACED Program,
Merritt
Caroline MacDonald, Entrepreneurial Certificate
Program CFDC First, Douglas Lake
Collette Manuel, Student Upper Nicola Band, Merritt
Gilbert Mike, UNB, Merritt
Alice C. Morgan, ACED SFU Student, Merritt
Lesley N. Morgan, ACED SFU Student, Merritt

Kamloops (continued)

Christina OaSieur
Christie Oppenheim, SFU Student
Dean Pelegrin
Colin Penner, SFU / NVIT, Merritt
Lundea Riffel, Community Futures of Central Interior First Nations, Kamloops
Robert Ryan, ACED SFU Student, Prince George
Daniel Saul, Secwepemc Cultural Education Society Museum, Kamloops
Debbie Sampson, Entrepreneurial Certificate Program CFDC First, Chase
Linda Sheena, Upper Nicola Band, Merritt
Lorna Shuter, Aboriginal Community Economic Development SFU Student, Kamloops
Joseph Smith, Kamloops
Debi Stewart, Kamloops Indian Band, Kamloops
Chelsea Stirling, SFU / NVIT Lower Nicola Band, Merritt
Cindy Tom-Lindley, Upper Nicola Band N'Kwala Beach RV, Merritt
Winn Turner, ACED SFU Student, Merritt
Joyce Willard, Entrepreneurial Certificate Program CFDC First, Kamloops

Prince George

Anne Banford, Bednesti Lake Resort, Vanderhoof
Trevor Carpenter, Smokehouse Kitchen, Prince George
Devanee Cardinal, Cardinal Ranch, Valemont
Buddy Cardinal, Cardinal Ranch, Valemont
Samantha Charles, PGNFC Curator Native Art Gallery, Prince George
Marie Debon, Quesnel Native Friendship Centre, Quesnel
Glenda Dennis, Wetsuwetch Nation, Prince George
Margo French, Carrier Sekani Tribal Council, Prince George
Greg George, Morricetown, Smithers
Angie Grant, Carrier Sekani Tribal Council, Prince George
Lori Henry, PGNFC Camp Friendship Coordinator, Prince George
Marion Hunt Doye, Kwaqiuq of Ft. Rupert, Prince George
Herb Lazarre, NakozdLi Artist to Invoke Vocal Efficacy, Prince George
Brigitte Kollner, Quesnel Hospital Centre, Quesnel
Milton Layton, Morricetown
Lillian Lenhart, Lilly's Native Crafts & Gifts, Vanderhoof
Angelique Levac, Angelique's Native Arts, Prince George
Jerome Listhaeqhe, West Moberly First Nations,
Liz Logan, Fort Nelson First Nations, Fort Nelson
Jason Majore, Yekooche First Nations, Prince George
Vincent Prince, Nu Yiz Boat Tours, Fort St. James

Cranbrook

Caroline Basil, Tobacco Plains & Red Eagle Contracting, Grasmere
Scott Blissett, Interior Reforestation Company, Cranbrook
Annie Capilo, Skulni Elder, Cranbrook
Mystri Duncan, Creston
Xavier Eugene, Kinbasket, Radium
Glen G. Felix, College of the Rockies, Cranbrook
Dan Gravelle, Tobacco Plains, Grasmere
Erin Gravelle, Tobacco Plains, Grasmere
Agatha Jacob, Ktunaxa Teepee, Creston
Pat Jacobs, Creston
Wayne King
Robert Lepine, Métis, Fernie
Brent Lucas, KKDC, Cranbrook
Agnes McCoy, St. Mary's, Cranbrook
Gayle Michel, Columbia Lake, Windermere
Linda P. Michel, Columbia Lake, Windermere
Karen Miller, Cranbrook
Stephanie Miller, Cranbrook
Jason Mouleman, A'qam Native Plant Nursery, Cranbrook
Rosemary Nicholas, KKTC, Cranbrook
Dianne O'Neil, St. Mary's Band, Cranbrook
Joe Pierre, Lower Kootenay, Creston
Helter Ponte, KKTC, Cranbrook
Eldene Stanley, Columbia Lake, Merritt
Julia Thomas, College of the Rockies, Cranbrook

Nanaimo

Frank Brown, Chemainus
Kathy Brown, Chemainus
Brenda Clark, RETHINK
Melinda Fellows-Grund, Micmac
Deb George, The Simon Charlie Society
Ron George, Quwu'tsun Tribes
Souie Gorup, Parks Canada Agency: Gulf Islands National Park Reserve
Neils Gram, Choo-Kwa Ventures
Robyn Gray, School District 68
Rob Hinksman, Snuneymuxw First Nations Forestry
Harry Johnston, Nawash Mariner
Katherine Knighton, Coast Bastion Inn
Laura Langstaff, CCPMP
Sarah Modesk
Mark Sittler, Snuneymuxw First Nation, Nanaimo
Bjorn Smionsen, The Bastion Group, Duncan
Jeff Thomas, Snuneymuxw First Nation, Nanaimo
Sandie Wilton, Heaven Scent Catering
Mary-Ellen Wood, Tale'awtx Aboriginal Capital Corp.

Tofino

Lawrie Bowles, Ucluelet First Nation Economic Development Consultant, Heriot Bay
Violet CLark, Ahousaht Council, Ahousaht
Nadine Crookes, Parks Canada Agency: Pacific Rim National Park Reserve, Ucluelet

Tofino (continued)

Bruce Frank, Tla-o-qui-aht First Nations, Tofino

Clifford Lucas, Hesquiat First Nation, Tofino

Iris Lucas, Mamook Development Corporation,
Ucluelet

Bev Martin, Tlaoquiaht Economic Development,
Tofino

Gisele Martin, Tla-ook Cultural Adventures, Tofino

Sandra Milliken, Pacific Rim National Park Reserve
of Canada, Ucluelet

Louanne Ralstan, Parks Canada Agency: Pacific rim
National Park Reserve, Ucluelet

Dana Roberts, Campbell River Band, Campbell River

Lise Steele, As Wild As You Like Adventures,
Campbell River

Douglas Wright, Tlaook Cultural Adventures &
Naachars Adventure Centre, Tofino

Appendix D: Aboriginal Tourism Survey

Building Aboriginal Cultural Tourism In British Columbia A Blueprint Strategy Survey

Introduction

The Aboriginal Tourism Association of British Columbia (ATBC) in cooperation with its provincial and federal government partners is working towards the creation of a “Blueprint” strategy to guide the development and marketing of Aboriginal cultural tourism in this province. This “Blueprint” is intended and needs to be developed by Aboriginal people for Aboriginal people and their communities.

What Is Aboriginal Cultural Tourism

Many descriptions of Aboriginal Cultural Tourism exist. However, the Board of Directors of the Aboriginal Tourism Association of British Columbia (ATBC) has defined Aboriginal cultural tourism as...

“...a cultural experience that must be tied directly to an Aboriginal person, or group of Aboriginal people.

The Cultural experience is authenticated in one of two ways:

- 1) As a direct result of permission provided through that person or persons Cultural Keepers, Elders or those designated with the authority to approve the sharing of the experience as it relates to that culture; or
- 2) As a result of experiences relating to either traditional Aboriginal culture or today’s living culture as it is reflected through modern day lifestyle.

ATBC operates under the guiding principal that Aboriginal Cultural protocol must be adhered to and that ATBC members must operate their businesses with the highest degree of integrity and respect for other Aboriginal people, their beliefs and their traditions.

ATBC’s focus is on promoting Aboriginal cultural tourism and has developed a baseline definition of Cultural Tourism to be more inclusive verses exclusive; to include both traditional and historical culture as well as our evolving modern day Aboriginal culture.”

What We Need From You

We need a clear picture of what Aboriginal people interested in improving Aboriginal cultural tourism products and services feel should be emphasized in the Blueprint strategy. We need this information now, at the early stages of the strategy’s development. In particular, we want to learn your perspectives on several aspects of this potential strategy’s design.

How Your Comments will be Used

Remember that your opinions are very important in making this Blueprint Strategy a practical and comprehensive guide for future Aboriginal Cultural Tourism development in this province. Your own views will be kept strictly confidential. They will be combined with those of many other Aboriginal people and communities to shape this strategy and its related programs. So please send your comments by March 17, 2004. Your thoughts and perspectives are both welcome and needed. Thanks so much for helping in this important work.

Returning the Questionnaire

To help gain a better understanding of your views would you kindly answer the following questionnaire? Please add further comments you might have on these points in the space provided in each section of the questionnaire. Upon completing this survey, return it by:

- a) **Fax to:** (604) 980-1098
- b) **Mail to:** Aboriginal Tourism Association of BC, PO Box 2558, Vancouver, BC V6B 8W8

<i>Return by March 17, 2004</i>
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Now The Questions!

1. About You

Please provide some basic information about you. This will help organize the answers to the questions we receive.

1. What is your Aboriginal status? (*Check appropriate box*)

- Full Status / Registered Indian
- Non-Status
- Métis
- Other (please indicate) _____

1.2 What is your First Nation affiliation? (*List the name, location, or your First Nation / Aboriginal heritage*)

Band _____

Band Community Location _____

First Nation / Tribal Nation _____

Métis _____

1.3 What is your interest in Aboriginal Cultural Tourism? (Please record your answer in the appropriate box provided beside each statement and check as many that apply).

My interest in Aboriginal cultural tourism is as:	Yes	No
	An operator of an Aboriginal cultural tourism product / service	<input type="checkbox"/>
An employee of an Aboriginal cultural tourism product / service	<input type="checkbox"/>	<input type="checkbox"/>
A potential operator of an Aboriginal cultural tourism product / service	<input type="checkbox"/>	<input type="checkbox"/>
A potential employee an Aboriginal cultural tourism product / service	<input type="checkbox"/>	<input type="checkbox"/>
A Band member encouraging protection of Aboriginal cultural values	<input type="checkbox"/>	<input type="checkbox"/>
A Band member encouraging economic development	<input type="checkbox"/>	<input type="checkbox"/>
A Band Elder or elected representative concerned about community values	<input type="checkbox"/>	<input type="checkbox"/>
A non-Band member partnering with / supporting Aboriginal Culture Tourism operators	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>

1.4 Do you have any other interests in Aboriginal cultural tourism that you would like to share? If so, please indicate it in the space provided here:

2.0 About Aboriginal Cultural Tourism’s Potential Social-Cultural Changes

2.1.a Many potential changes can be created by growing Aboriginal cultural tourism in your territory. Please indicate the degree to which you feel the following potential changes will occur if this type of tourism is increased in your Aboriginal territory. (Please give your answers in the appropriate box provided beside each statement.)

Aboriginal cultural tourism introduced into my territory will result in:	Strongly Disagree	Moderately Disagree	Uncertain	Moderately Agree	Strongly Agree	Don’t Know / NR
Increased availability of Aboriginal cultural facilities and activities in my territory	<input type="checkbox"/>					
Increased loss of my Band’s culture due to the presence of visitors	<input type="checkbox"/>					
Increased opportunities for my Band to learn about their own culture and heritage	<input type="checkbox"/>					
Increased opportunities to meet interesting visitors and learn about other cultures	<input type="checkbox"/>					
Increased pressure on my Band’s people to perform for visitors	<input type="checkbox"/>					
Increased life and vitality for the Band’s members	<input type="checkbox"/>					
Increased number of jobs in the territory	<input type="checkbox"/>					
Increased commercialization of Aboriginal culture in the territory	<input type="checkbox"/>					
Increased variety of goods and services in the territory	<input type="checkbox"/>					

Increased opportunities to learn and practice traditional arts and crafts	<input type="checkbox"/>					
Increased pressures on local Band facilities and services	<input type="checkbox"/>					
Increased crowds affecting residents' enjoyment of normal Band life	<input type="checkbox"/>					
Increased pride about the identity of the area	<input type="checkbox"/>					
Increased pressures on the quality of the areas natural environment	<input type="checkbox"/>					
Increased cost of living for Band members	<input type="checkbox"/>					
Increased Band spirit among members	<input type="checkbox"/>					

2.1.b Please list any other positive or negative changes that you feel might occur if Aboriginal Cultural tourism is developed further in your territory.

3.0 About Aboriginal Cultural Tourism's Management

3.1 What are the 3 **most important reasons** for encouraging Aboriginal cultural tourism development in your territory (*Please specify*)?

- a) Most important reason _____
- b) Second most important reason _____
- c) Third most important reason _____

3.2 What are the 3 **most important concerns** you have about increasing Aboriginal cultural tourism in your territory (*Please specify*)?

- a) Most important concern _____
- b) Second most important concern _____
- c) Third most important concern _____

3.3 How important do you feel the following guiding principles are in ensuring that Aboriginal cultural tourism benefits your Band? (*Please give your answers in the appropriate box provided next to each statement.*)

In order to benefit my Band, Aboriginal cultural tourism should:	Not At All Important	Somewhat Important	Very Important	Don't Know / NR
Involve the participation of Aboriginal People as guides, cultural interpreters, managers etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focus on displaying, exhibiting, using Aboriginal techniques and methods approved by the community's "Culture Keepers".	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In order to benefit my Band, Aboriginal cultural tourism should:	Not At All Important	Somewhat Important	Very Important	Don't Know / NR
Focus on portraying local customs and culture (e.g., local language, costume, arts and crafts, foods, performances).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide the cultural tourism experience on the original site or territory of the Aboriginal culture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide the cultural experience away from the original site or territory of the Aboriginal culture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide opportunities for the Aboriginal community's Elders / Cultural Keepers to review the cultural tourism products being offered on a regular basis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide guests and travel operators with pre-trip information about what to expect from their Aboriginal cultural tourism experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take steps to ensure that culturally sensitive places and activities are protected from visitor and tour company use.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establish Aboriginal cultural tourism managers and involve them in regional and provincial tourism organization activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure that all Aboriginal cultural tourism activities are done in environmentally sensitive ways.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure that all goods and services are supplied by local and regional Aboriginal suppliers (where possible).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure that all staff involved in the tourism enterprise understand and can explain Aboriginal culture in the region.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure that there is an active and up-to date Aboriginal employee orientation program that includes cross-cultural relations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure that the Aboriginal cultural tourism products and services are available to tour companies in a manner suited to tour packaging.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensure that the Aboriginal products and services developed reflect the needs of the marketplace.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.4 Do you have any other interests in Aboriginal cultural tourism management that you would like to share? If so, please indicate it in the space provided here:

4.0. About Future Aboriginal Cultural Tourism Opportunities

4.1.1 The following list describes a range of Aboriginal cultural tourism opportunities used by travellers visiting British Columbia and other Aboriginal cultural tourism destinations. Please indicate how much potential each of the following products / services and attractions has for development in your territory. *(Please give your answers in the appropriate box provided beside each statement.)*

Development Potential For Aboriginal Cultural Tourism Products / Services / Attractions Available In My Community / Region	No Potential At All	Some Potential	A Lot of Potential	Don't Know / NR
Aboriginal interpretation centres and museums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal community tours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal historical site tours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal restaurants and food service businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal accommodation services (hotels / motels, bed and breakfast homes)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal accommodation (campgrounds and Recreation Vehicle parks)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal festivals / ceremonies and other cultural events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal outdoor / nature adventures and tours (horseback riding, canoeing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal art galleries / crafts exhibits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal transportation services (e.g., water taxis, air services etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aboriginal live performance of arts – dance, story telling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.1.2 Are there other types of Aboriginal cultural tourism opportunities that could be developed in your territory? *(Please specify here.)*

5.0 About Community Support

5.1.1 To what extent does your Band currently support the marketing of Aboriginal cultural tourism opportunities through the use of the following techniques? *(Please give your answers in the appropriate box provided beside each statement.)*

Marketing techniques currently used by your Band to promote Aboriginal cultural tourism	Not Used At All	Used A Little	Used Extensively	Don't Know
Internet websites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brochures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Television / radio advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Familiarization tours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Including Aboriginal cultural tourism in broader travel packages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promoting Aboriginal cultural tourism through tour operators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attending travel tradeshow and travel marketplaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in tourism / hospitality and travel training workshops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in regional and provincial and regional tourism association marketing programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.2.2 If there are other ways in which Aboriginal cultural tourism marketing occurs in your Band *please specify* what those methods are:

5.2.3 There are many different factors that can slow down the development of Aboriginal cultural tourism. Please indicate the extent to which each of the following factors is a constraint to growth of Aboriginal Cultural tourism in your Band / territory. *(Please give your answers in the appropriate box provided beside each statement.)*

Factors Potentially Constraining The Development of Aboriginal Cultural Tourism Products / Services / Attractions In Your Band / Territory	Not A Constraint At All	Somewhat of a Constraint	A Major Constraint	Don't Know / NR
Limited availability of education and awareness programs explaining the potential benefits of Aboriginal cultural tourism to my Band members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited availability of training opportunities for Aboriginals to participate in Aboriginal cultural tourism businesses and services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited understanding of travel markets suited to visiting Aboriginal attractions, services and products.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited development of business and management skills needed to participate in Aboriginal cultural tourism ventures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited availability of financing options needed to participate in Aboriginal cultural tourism businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited support from Aboriginal Band institutions for the development of Aboriginal cultural tourism opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited resources for development of marketing plans and promotion of Aboriginal cultural tourism attractions, products and services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited access of travellers to Aboriginal territory.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited availability of a trained workforce interested in working in Aboriginal cultural tourism ventures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited availability of Band community infrastructure (transportation, accommodation, food and beverage services) needed to accommodate visitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited receptivity / 'welcomeness' in the way the Band / community appears to visitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited land use and community planning to allow for tourism or business development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited willingness of Aboriginal Band leaders to support Aboriginal cultural tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited professionalism in the operation of current Aboriginal cultural tourism businesses in your Band / territory.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.2.4 Please list the 3 most critical constraints that need to be overcome for Aboriginal cultural tourism to flourish in your Band / territory. *(They may be listed above or new ones, please specify)*

1st Most Important Constraint: _____

2nd Most Important Constraint: _____

3rd Most Important Constraint: _____

5.3 Do you have any other comments on Community support that you would like to share? If so, please indicate it in the space provided here:

6.0 Tourism Priorities and Involvement

6.1 Please list three (3) kinds of tourism businesses that should be the priority of your Aboriginal community?

1st Most Important: _____

2nd Most Important: _____

3rd Most Important: _____

6.2 What government or private sector organizations **are currently** the most important in supporting Aboriginal Cultural tourism development in your Band / territory. *(Please specify)*

6.3 What government or private sector organizations **could potentially play a greater role** in supporting Aboriginal cultural tourism development **in your community / region**. *(Please specify)*

6.4 Please list up to 4 organizations and agencies that you think **should play a greater role** in supporting, promoting and building Aboriginal cultural tourism in BC? *(Please specify)*

1) _____

2) _____

3) _____

4) _____

6.5 Do you have any other comments on tourism priorities and involvement that you would like to share? If so, please indicate it in the space provided here:

7.0 Other Thoughts

7.1 If you have any further comments you would like to provide on the development of this Aboriginal Cultural Tourism Strategy, please indicate them in the following space, or contact us at: Toll-free 1-877-266-2822 or 604-980-1088 or e-mail director@ATBC.bc.ca: (*Please specify*)

Thanks for your thoughts and perspectives! Please return the completed survey by:

- a) **Fax to:** (604) 980-1099
- b) **Mail to:** Aboriginal Tourism Association of BC, PO Box 2558, Vancouver, BC V6B 8W8

<i>Return by March 17, 2004</i>
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Appendix E: Tour Operator Interview Participants

Canadian Receptive Tour Operators	Source Markets
Jonview Canada	Europe, North & South America, Asia Pacific
CanEscapes (BCAA)	Europe, North America
DER New World Tours	Europe, North America
Dominion Tours	Mexico
Maple Fun Tours	Japan
JAC Travel	UK, Germany, Switzerland, North America
Discover Holidays	UK, Asia Pacific, North America
Domestic	Source Markets
Fresh Tracks Canada	Canada, US, UK, Australia, Japan
Horizon & Co (formerly Horizon Holidays)	Canada
Great Vacations (Grayline of Vancouver / Greyhound Vacations)	US, Canada, Europe, Asia Pacific
Routes to Learning (Elder Hostel)	Canada, US
Entrée Canada	US
Midnight Sun Travel	Canada, US, Europe, Australia
Island Adventure Tours	Canada, US, Europe, Australia
United States (US)	Source Markets
Globus & Cosmos	US, Canada, UK
Collette Vacations	US, Canada
Tauck World Discovery	US, Canada, UK, Australia
Natural Habitat	US
Wildland Adventures	US
Vantage Travel Group	US
Gutsy Women Travel	US
Austin-Lehman	US
Germany	Source Markets
Canada Reise Dienst CRD International GmbH	Germany
Studiosus Reisen	Germany
FTI	Germany
Switzerland	Source Markets
Sky Tours	Switzerland
Hotelplan	Switzerland
United Kingdom (UK)	Source Markets
Saga Holidays	UK
Signature Vacations	UK
Tailor Made Holidays	UK
Thomas Cook	UK
Travel 2 / 4	UK
Australia / New Zealand	Source Markets
Talpacific Holidays	Australia
Travelplan Holidays	New Zealand

Appendix F: Tour Operator Survey

Aboriginal Tourism British Columbia Travel Trade Survey	
<i>Company Name</i>	
<i>Brief Business Description</i>	
<i>Contact</i>	
<i>Title</i>	
<i>Address</i>	
<i>City</i>	
<i>Country</i>	
<i>Telephone Number</i>	
<i>Fax Number</i>	
<i>Email</i>	
<i>Website URL</i>	
<i>In Business Since?</i>	
<i>Date of Survey</i>	
A. TYPE, SIZE AND NATURE OF YOUR BUSINESS	
<i>1. What type of business do you operate?</i>	
Wholesale	
Travel Agent	
Tour Operator	
Incentive / Convention	
Other (specify)	
<i>2. Approximate annual number of clients</i>	
Worldwide	
To Canada	
To British Columbia	
<i>3. What travel experiences to you offer?</i>	
Independent Vacations	
Group Vacations	
Adventures (Group or FIT or part of a touring itinerary)	
Incentive programs	
Learning Travel Programs (Group or FIT or part of a touring itinerary)	
Other (Describe)	
<i>4. How do you sell / market your travel experiences?</i>	
Brochures	
Website	
Direct Mail	
Advertising (newspaper, magazine, radio, tv, e-marketing?)	
Tradeshows	
<i>5. What Selling Channels do you use?</i>	
Via Travel Agents (Online and Offline)	
Via Other Tour Operators	
Via Meeting / Incentive Planners	

Alumni / Universities		
Cultural associations / groups		
Nature / environmental associations / groups		
Directly to the Consumer		
Other (Describe)		
TOTAL		100%
B. YOUR ABORIGINAL PRODUCT OFFERINGS / PRODUCT DEVELOPMENT		
1. Do you sell Indigenous / Aboriginal Tourism Experiences in countries other than Canada?		
YES		
NO		
2. What Aboriginal Tourism Experiences do you currently offer in Canada?		
Museum / Attractions		
Interpretive programs		
First Nations Owned and Operated Hotels		
Adventures & Nature Viewing		
Meals		
Other (Describe)		
NONE		
Note: If above answer is None, then move to question #5.		
3. What percentage do you sell as Start -up experiences versus inclusion in a package?		
Start -up		
As Part of a Package		
TOTAL		100%
4. Describe the three most popular Indigenous / Aboriginal tourism products you offer in Canada or elsewhere, including product name and description, duration (hours / days), location and price.		
Product Name & Description (inclusions)	Duration (days)	Location
		Approx. Pricing
The following questions to be answered by all.		
5. Would you consider offering / expanding your Aboriginal Tourism Experiences in Canada in the future?		
YES		
NO		
If No, please explain why.		
If yes, please describe what kinds of experiences / attractions / museums you would be interested in, including duration and location (if preference).		
Product description (inclusions)	Duration (hours or days)	Location
If yes, please provide us with the average stay you would feature in a Aboriginal themed accommodation.		
		Please Check One:
1 night		
2 nights		
3 nights		
Other: _____		
6. What resources do you use to develop new products?		
		Which ones?
Attend Marketplaces / Tradeshow:		
Canadian Tourism Commission in-market staff		
Tourism BC in-market and BC based staff		
Tourism BC marketing materials		

Receptive Tour Operators			
Supplier Websites			
CTC / Tourism BC / DMO Websites			
Other: (Describe?)			
7. What is your average lead time for Product Planning?			
	<9 months	9 – 12 Months	>12 months
Summer programs			
Winter programs			
Note: If above answer is None, then move to question #4.			
C. YOUR CLIENTS			
1. Primary origins of your clients to British Columbia?			
Country / Region of Origin	All Experiences	Aboriginal Experiences	
Germany			
Austria			
Switzerland			
Total	100%	100%	
2. Clients Targeted			
Do You Offer	Yes / No	Percentage of Overall Business	
Mainstream Travel			
Family Travel			
Seniors Travel			
Adventure / Sports Enthusiasts			
Special Interest Travellers			
Total		100%	
3. For each of the following product characteristics and considering your clients' preferences: Indicate the importance of the particular product characteristic to your clients, where 1=very important, 2=somewhat important, 3=uncertain, 4=somewhat unimportant, 5=Not important at all, 6 = Don't know.			
Product Characteristic	Importance		
View and / or purchase authentic Aboriginal crafts and handiwork			
Hear Aboriginal legends			
Hear Aboriginal languages being spoken			
Hear Aboriginal songs			
View or participate in Aboriginal sporting events			
View Aboriginal performing arts, events and ceremonies (e.g., live theatre, concerts, dance festivals)			
Try traditional and modern cuisine prepared by Aboriginal people			
Learn about traditional use of the land by Aboriginal people			
Tour certified authentic Aboriginal facilities (e.g., tepee, longhouses, kekuli)			
Tour Aboriginal museums and art galleries			
Meet and interact with friendly local Aboriginal people in their communities			
Take part in outdoors adventures / tours with Aboriginal guides			
Take photographs of Aboriginal people and cultural sites			
Visit pristine wilderness areas with Aboriginal guides			
Experience Aboriginal tourism as part of broader tour packages			

<p>1. What do you see as the emerging trends in both the market and product for Indigenous / Aboriginal tourism?</p>
<p>2. What do you see as the best opportunities for the development of Aboriginal tourism in British Columbia?</p>
<p>3. What do you see as the top 3 issues constraining the development of Aboriginal tourism in British Columbia?</p>
<p>4. What pre-qualifications do you use to select an Aboriginal supplier?</p>
<p>5. What price range are you seeking from the Aboriginal supplier for packaging? – Please explain daily rate with the package duration?</p>
<p>6. What do you see as the issues constraining Aboriginal tourism when they try to access Aboriginal product?</p>
<p>7. Do you / or would you if product were available, book more than one venue?</p>
<p>8. What steps or processes do you think need to be taken to bridge Aboriginal product with non-Aboriginal product?</p>
<p>9. What information or assistance would encourage you to offer British Columbia Aboriginal tourism products?</p>
<p>10. Do you have any final comments or advice?</p>
<p><i>“Thank you for your time today”</i></p>

Appendix G: Other Aboriginal Tourism Performance Indicators

The table below provides other key indicators that can be used to measure the progress of Aboriginal tourism in several markets – First Nation involvement, community participation, business, visitors, travel trade, travel media, and individuals. While the Blueprint Strategy recommends indicators to be used to assess its activities’ performance, these indicators may be useful for evaluating other projects.

Performance Area	New, Start-up Businesses / Products	Existing but Not Market Ready Businesses / Products	Market Ready Businesses / Products	Instruments
Community Involvement	<ul style="list-style-type: none"> • Number of communities holding tourism awareness programs • Number of communities entering tourism and developing cultural programs • Revenue generated by Aboriginal tourism in communities • Number of communities inviting coaching assistance 	<ul style="list-style-type: none"> • Number of existing but not market ready products adding cultural programs that are community based • Revenue generated by existing but not market ready Aboriginal tourism businesses for communities 	<ul style="list-style-type: none"> • Number of market ready products with community cultural / interpretive content • Revenue generated through market ready products to communities 	<ul style="list-style-type: none"> • Files of program implementers • Access to website by community representatives • Surveys of communities • Surveys of Aboriginal tourism operators
Communications Effectiveness	<ul style="list-style-type: none"> • Awareness of the Blueprint Strategy amongst communities • Number of visits by communities to website • Number of start-up businesses accessing website 	<ul style="list-style-type: none"> • Awareness of Blueprint Strategy by operators • Awareness of website and support tools 	<ul style="list-style-type: none"> • Awareness in travel trade, media of market ready Aboriginal tourism products • Success stories available on market ready products 	<ul style="list-style-type: none"> • Surveys of communities • Website analysis • Surveys of operators • Surveys of travel trade • Surveys of stakeholder agencies
Labour and Human Resources	<ul style="list-style-type: none"> • Number of Aboriginal people in tourism related business/entrepreneur, hospitality and management programs 	<ul style="list-style-type: none"> • Number of Aboriginal employees in tourism businesses – at entry level, front-line and management positions • Number of cultural interpretive guides 	<ul style="list-style-type: none"> • Number of Aboriginal employees in tourism businesses – at entry level, front-line and management positions • Number of cultural interpretive guides 	<ul style="list-style-type: none"> • Surveys of mainstream tourism businesses
Training Initiatives	<ul style="list-style-type: none"> • Number of participants in training sessions by type • Number of sessions delivered • Number of website accesses to resource material 	<ul style="list-style-type: none"> • Number of participants in training sessions by type • Participant evaluations of sessions • Number of sessions delivered • Number of website accesses to resource material 	<ul style="list-style-type: none"> • Number of participants in training sessions by type • Participant evaluations of sessions • Number of sessions delivered • Number of website accesses to resource material 	<ul style="list-style-type: none"> • Surveys of Aboriginal tourism businesses • Surveys of training institutions and trainers • Participant evaluations of sessions

Appendix H: Aboriginal Product Market Segment Profiles

Market Profile of Aboriginal Heritage Travel Market

This summary profiles Aboriginal tourism travellers who participated in the 2003 pre and post-trip surveys *and who indicated that it was somewhat or very important for them have opportunities to visit Aboriginal museums and art galleries, or authentic Aboriginal facilities on future trips to BC.*

More than four-fifths (87%) of all Aboriginal tourism travellers indicated that such opportunities were a priority consideration for them in future travels to the province. The report provides an overview of their travel characteristics and then offers more detailed information about their experiences related to Aboriginal tourism in this province and elsewhere. The information provided is an important portion of the market-driven foundation needed to create an overall strategy for Aboriginal tourism in BC.

v WHO WERE THESE ABORIGINAL HERITAGE TRAVELLERS?

Aboriginal Heritage travellers tended to be:

- well-educated, upper middle income wage earners, female, baby boomers
- from overseas (39%), American (28%) and other Canadian (22%) locations

v WHAT TYPES OF TRIPS WERE THEY TAKING?

The trips pursued by these Aboriginal Heritage travellers were most apt to be:

- touring (58%) or visiting friends / relatives (13%) trips
- trips taken for leisure (76%) or visiting friends and relatives (16%) purposes

v WHAT PRE-TRIP PLANNING DID THEY DO?

Pre-trip planning done by these travellers tended to involve:

- about half (52%) of them having pre-trip familiarity with Aboriginal tourism in BC
- about a third (37%) of them being able to find the pre-trip information needed for the Aboriginal portion of their trip
- the vast majority (87%) of them organizing most of their trip on their own
- the vast majority (82%) of them doing their planning at least 3-8 weeks in advance
- the largest proportion (55%) of them not using formal travel trade or tourism organization information channels for trip booking purposes
- the largest proportion (66%) of them using the Internet for trip planning purposes

✓ WHAT TYPE OF OVERALL DESTINATION SELECTION FEATURES WERE IMPORTANT TO THEM?

These Aboriginal tourists placed their highest levels of importance on having opportunities to visit places where they could:

- increase their knowledge
- visit places not seen before
- experience unique places
- experience pristine natural environments

While not necessarily the most important reason for selecting BC, opportunities to pursue Aboriginal tourism represented about a quarter (24%) of the reason for their trip

✓ WHAT WERE THEIR TRAVEL PATTERNS?

Compared to other BC travellers these Aboriginal tourists were more apt to be:

- taking shorter length trips (avg. 21 days)
- spending about the same amount of time in BC (avg. 12 days)
- including more days on Aboriginal experiences (avg. 2.7 days)
- traveling in larger travel parties (avg. of 3.6 persons)
- spending significantly more money on trip days (avg. \$553 per travel party / day)
- visiting more Aboriginal locations (avg. 2.2 sites)
- visiting Aboriginal interpretive centres (25%), other attractions (21%), museums (20%), and festivals (13%)

✓ HOW SATISFIED WERE THEY WITH THEIR TRIPS?

With respect to various features of their overall BC trip, they tended to be:

- *most satisfied with:* opportunities to visit safe, unique, high quality natural environments that they had not visited before, as well as visit places where they could take part in outdoor activities, increase their knowledge of cultures as well as shop
- *least satisfied with:* opportunities to take part in cultural activities, see unique / different Aboriginal groups, experience other Aboriginal heritage sites, try new foods, access comprehensive travel information prior to traveling

With respect to specific features of their Aboriginal tourism experiences, they tended to be:

- *somewhat or very satisfied* (78%) with their overall Aboriginal experiences in BC
- *most satisfied with opportunities to:* view and / or purchase authentic Aboriginal crafts and handiwork, and tour Aboriginal museums and art galleries

- *least satisfied with opportunities to:* view / pursue Aboriginal sporting events, try Aboriginal cuisine, take part in nature-based activities in remote pristine areas with Aboriginal guides, and hear Aboriginal languages being spoken
- *not satisfied that:* enough opportunities to experience Aboriginal tourism sites / attractions / events existed (55%)

Their most positive impressions of Aboriginal tourism in BC tended to be associated with opportunities to:

- learn about Aboriginal culture / heritage (47%)
- learn about Aboriginal people (36%)
- experience Aboriginal friendliness and receptiveness to visitors (32%)
- appreciate their arts and crafts (27%)

The chances of them returning to BC for Aboriginal tourism in the next three years were:

- very likely (40%) or somewhat likely (26%) to happen

v WHAT IS THE ABORIGINAL TOURISM COMPETITION?

The most frequently mentioned destination competitors tended to be other North American destinations such as:

- the United States (77%), other parts of Canada (64%), and Mexico (19%)

The most frequently used Aboriginal tourism products and services at these competing destinations tended to be:

- Aboriginal interpretive centres and / or related archaeological sites (33%), Aboriginal communities (17%), and other attractions (15%)

The most frequently mentioned competitive advantages of Aboriginal tourism in BC compared to these competitors were related to the:

- quality / uniqueness of Aboriginal arts, crafts, cuisine, and architecture (43%)
- willingness of Aboriginal peoples to share their knowledge and heritage (39%)
- accessibility of contemporary Aboriginal culture, communities, events festivals (25%)
- important linkages between Aboriginal culture and natural environments (24%)

Overall Aboriginal tourism opportunities in BC were perceived to be slightly more competitive than that offered elsewhere in North America:

- about 44% of the travellers felt it was about equal in competitiveness
- another 35% of them felt it somewhat or substantially more competitive

Market Profile of Aboriginal Festival and Events Travel Market

This summary profiles Aboriginal tourism travellers who participated in the 2003 pre and post-trip surveys and who indicated that it was somewhat or very important for them have opportunities to view Aboriginal performing arts, events, and ceremonies in future trips to BC.

About a four-fifths (80%) of all Aboriginal tourism travellers indicated that these opportunities were a priority consideration for them in future travels to the province. The report provides an overview of their travel characteristics and then offers more detailed information about their experiences related to Aboriginal tourism in this province and elsewhere. The information provided is an important portion of the market-driven foundation needed to create an overall strategy for Aboriginal tourism in BC.

✓ WHO WERE THESE EVENTS / FESTIVALS ABORIGINAL TRAVELLERS?

Events / Festivals Aboriginal travellers tended to be:

- well-educated, upper middle income wage earners, female, older baby boomers
- from overseas (35%), American (27%) and other Canadian (21%) locations

✓ WHAT TYPES OF TRIPS WERE THEY TAKING?

The travel pursued by these Aboriginal festival / event tourists were most apt to be:

- touring (58%) or visiting friends / relatives (13%) trips
- taken for leisure (75%) or visiting friends and relatives (16%) purposes

✓ WHAT PRE-TRIP PLANNING DID THEY DO?

Pre-trip planning done by these travellers tended to involve:

- about half (52%) of them having pre-trip familiarity with Aboriginal tourism in BC
- about a third (36%) of them being able to the pre-trip information required for the Aboriginal portion of their trip
- the vast majority (87%) of them organizing most of their trip on their own
- the vast majority (91%) of them doing trip planning at least 3-8 weeks in advance
- the largest proportion (54%) of them not using formal travel trade or tourism organization information channels for trip booking purposes
- the largest proportion (64%) of them using the Internet for trip planning purposes

✓ WHAT TYPE OF OVERALL DESTINATION SELECTION FEATURES WERE IMPORTANT TO THEM?

These Aboriginal tourists placed their highest levels of importance on having opportunities to visit places where they could:

- increase their knowledge
- visit places not seen before
- experience unique places
- experience pristine natural environments

While not necessarily the most important reason for selecting BC opportunities to pursue Aboriginal tourism represented about a quarter (26%) of the reason for their trip

√ WHAT WERE THEIR TRAVEL PATTERNS?

Compared to other BC travellers these Aboriginal tourists were more apt to be:

- taking very similar length trips (avg. 22 days)
- spending more trip days in BC (avg. 12 days)
- including Aboriginal experiences on trip days (avg. 2.8 days)
- traveling in larger travel parties (avg. of 3.7 persons)
- spending significantly more money on trip days (avg. \$596 per travel party / day)
- visiting about the same number of Aboriginal locations (avg. 2.2 sites)
- visiting Aboriginal interpretive centres (26%), other attractions (21%), museums (18%), and festivals (14%)

√ HOW SATISFIED WERE THEY WITH THEIR TRIPS?

With respect to various features of their overall BC trip, they tended to be:

- *most satisfied with:* opportunities to visit safe, unique, high quality natural environments that they had not visited before, as well as visit places where they could take part in outdoor activities, increase their knowledge of cultures as well as shop
- *least satisfied with:* opportunities to see unique / different Aboriginal groups, experience other Aboriginal heritage sites, try new foods, access comprehensive travel information prior to traveling

With respect to specific features of their Aboriginal tourism experiences, they tended to be:

- *somewhat or very satisfied* (78%) with their overall Aboriginal experiences in BC
- *most satisfied with opportunities to:* view and / or purchase authentic Aboriginal crafts and handiwork, and tour Aboriginal museums and art galleries
- *least satisfied with opportunities to:* view / pursue Aboriginal sporting events, try Aboriginal cuisine, take part in nature-based activities in remote pristine areas with Aboriginal guides, and hear Aboriginal languages being spoken
- *not satisfied that:* enough opportunities to experience Aboriginal tourism sites / attractions / events were available (56%)

Their most positive impressions of Aboriginal tourism in BC tended to be associated with opportunities to:

- learn about Aboriginal culture / heritage (48%)
- experience Aboriginal friendliness and receptiveness to visitors (32%)
- appreciate Aboriginal people (40%) and their arts and crafts (26%)

The chances of them returning to BC for Aboriginal tourism in the next three years were:

- very likely (33%) or somewhat likely (26%) to happen

v WHAT IS THE ABORIGINAL TOURISM COMPETITION?

The most frequently mentioned destination competitors tended to be other North American destinations such as:

- the United States (75%), other parts of Canada (64%), and Mexico (19%)

The most frequently used Aboriginal tourism products and services at these competing destinations tended to be:

- Aboriginal interpretive centres and / or related archaeological sites (33%), Aboriginal communities (18%), and other attractions (15%)

The most frequently mentioned competitive advantages of Aboriginal tourism in BC compared to these competitors were related to the:

- quality / uniqueness of Aboriginal arts, crafts, cuisine, and architecture (42%)
- willingness of Aboriginal peoples to share their knowledge and heritage (42%)
- accessibility of contemporary Aboriginal culture, communities, events festivals (24%)

Overall Aboriginal tourism opportunities in BC were perceived to be slightly more competitive than that offered elsewhere in North America:

- about 44% of the travellers felt it was about equal in competitiveness
- another 36% of them felt it somewhat or substantially more competitive

Market Profile of Aboriginal Cuisine Travel Market

This summary profiles Aboriginal tourism travellers who participated in the 2003 pre and post-trip surveys and who indicated that it was somewhat or very important for them have opportunities to try traditional or modern Aboriginal cuisine in future trips to BC.

About 74% of all Aboriginal tourism travellers indicated that such opportunities were a priority consideration for them in future travels to the province. The report provides an overview of their travel characteristics and then offers more detailed information about their experiences related to Aboriginal tourism in this province and elsewhere. The information provided is an important portion of the market-driven foundation needed to create an overall strategy for Aboriginal tourism in BC

✓ WHO WERE THESE CUISINE ABORIGINAL TRAVELLERS?

Cuisine Aboriginal travellers tended to be:

- well-educated, lower-middle income wage earners, female, younger baby boomers
- from overseas (35%), American (25%) and other Canadian (23%) locations

✓ WHAT TYPES OF TRIPS WERE THEY TAKING?

The travels pursued by these Cuisine Aboriginal travellers were most apt to be:

- touring (58%) or visiting friends / relatives (13%) trips
- for leisure (74%) or visiting friends and relatives (17%) purposes

✓ WHAT PRE-TRIP PLANNING DID THEY DO?

Pre-trip planning done by these travellers tended to involve:

- about half (51%) not having pre-trip familiarity with Aboriginal tourism in BC
- over a third (38%) of them being able to find the pre-trip information needed for the Aboriginal portion of their travel
- the vast majority (87%) of them organizing most of their trip on their own
- the vast majority (81%) of them doing their planning at least 3-8 weeks in advance
- the largest proportion (55%) of them not using formal travel trade or tourism organization information channels for trip booking purposes
- the largest proportion (65%) of them using the Internet for trip planning purposes

✓ WHAT TYPE OF OVERALL DESTINATION SELECTION FEATURES WERE IMPORTANT TO THEM?

These Aboriginal tourists placed their highest levels of importance on having opportunities to visit places where they could:

- increase their knowledge
- visit places not seen before
- experience unique places
- experience pristine natural environments

While not necessarily the most important reason for selecting BC, opportunities to pursue Aboriginal tourism represented about a quarter (26%) of the reason for their trip

✓ WHAT WERE THEIR TRAVEL PATTERNS?

Compared to other BC travellers these Aboriginal tourists were more apt to be:

- taking longer length trips (avg. 23 days)
- spending more days in BC (avg. 12 days)
- including more days on Aboriginal experiences (avg. 2.8 days)
- traveling in larger travel parties (avg. of 3.7 persons)
- spending less money on trip days (avg. \$524 per travel party / day)
- visiting fewer Aboriginal locations per trip (avg. 2.2 sites)
- visiting Aboriginal interpretive centres (27%), other attractions (22%), and museums 19%)

✓ HOW SATISFIED WERE THEY WITH THEIR TRIPS?

With respect to various features of their overall BC trip, they tended to be:

- *most satisfied with:* opportunities to visit safe, unique, high quality natural environments that they had not visited before, as well as visit places where they could increase their knowledge
- *least satisfied with:* opportunities to take part in cultural activities, see unique / different Aboriginal groups, experience other Aboriginal heritage sites, try new foods, and access comprehensive travel information prior to travelling

With respect to specific features of their Aboriginal tourism experiences, they tended to be:

- *somewhat or very satisfied* (77%) with their overall Aboriginal experiences in BC
- *most satisfied with opportunities to:* view and / or purchase authentic Aboriginal crafts and handiwork, and tour Aboriginal museums and art galleries
- *least satisfied with opportunities to:* view / pursue Aboriginal sporting events, hear Aboriginal languages being spoken, visit remote pristine areas with Aboriginal guides, try traditional and modern Aboriginal cuisine, and experience Aboriginal tourism as part of broader tourism packages
- *not satisfied that:* enough opportunities to experience Aboriginal tourism sites / attractions / events existed (58%)

Their most positive impressions of Aboriginal tourism in BC tended to be associated with opportunities to:

- learn about Aboriginal culture / heritage (49%)
- learn about Aboriginal people (38%)
- experience Aboriginal friendliness and receptiveness to visitors (30%)
- appreciate Aboriginal arts and crafts (27%)

The chances of them returning to BC for Aboriginal tourism in the next three years were:

- very likely (44%) or somewhat likely (24%) to happen

v WHAT IS THE ABORIGINAL TOURISM COMPETITION?

The most frequently mentioned destination competitors tended to be other North American destinations such as:

- the United States (72%), other parts of Canada (68%), and Mexico (19%)

The most frequently used Aboriginal tourism products and services at these competing destinations tended to be:

- Aboriginal interpretive centres and / or related archaeological sites (31%), Aboriginal communities (19%), and other Aboriginal attractions (15%)

The most frequently mentioned competitive advantages of Aboriginal tourism in BC compared to these competitors were related to the:

- quality / uniqueness of Aboriginal arts, crafts, cuisine, and architecture (43%)
- willingness of Aboriginal peoples to share their knowledge and heritage (39%)
- access to contemporary Aboriginal cultures, communities, events / festivals (25%)
- linkage between Aboriginal culture and natural environment (25%)

Overall Aboriginal tourism opportunities in BC were perceived to be slightly more competitive than that offered elsewhere in North America:

- about 43% of the travellers felt it was about equal in competitiveness
- another 36% of them felt it was somewhat or substantially more competitive

Market Profile of Aboriginal Nature-Based Travel Market

This report profiles Aboriginal tourism travellers who participated in the 2003 pre and post-trip surveys and who indicated that it was somewhat or very important for them have opportunities to take part in nature-based activities or visit pristine wilderness areas with Aboriginal guides in future trips to BC.

About 71% of all Aboriginal tourism travellers indicated that such opportunities were a priority consideration for them in future travels to the province. The report provides an overview of their travel characteristics and then offers more detailed information about their experiences related to Aboriginal tourism in this province and elsewhere. The information provided is an important portion of the market-driven foundation needed to create an overall strategy for Aboriginal tourism in BC.

v WHO WERE THESE NATURE-BASED ABORIGINAL TRAVELLERS?

Nature-Based Aboriginal Travellers tended to be:

- well-educated, middle income wage earners, female, baby boomers
- from overseas (39%), American (26%) and other Canadian (20%) locations

v WHAT TYPES OF TRIPS WERE THEY TAKING?

The trips pursued by these Nature-Based Aboriginal travellers were most apt to be:

- touring (58%) or visiting friends / relatives (12%) trips
- for leisure (77%) or visiting friends and relatives (15%) purposes

✓ **WHAT PRE-TRIP PLANNING DID THEY DO?**

Pre-trip planning done by these travellers tended to involve:

- about half (52%) not having some pre-trip familiarity with Aboriginal tourism in BC
- about a third (35%) of them finding the pre-trip information required for the Aboriginal tourism portion of their travels
- the vast majority (85%) of them organizing most of their trip on their own
- the vast majority (81%) of them doing their planning at least 3-8 weeks in advance
- the largest proportion (53%) of them not using formal travel trade or tourism organization information channels for trip booking purposes
- the largest proportion (67%) of them using the Internet for trip planning purposes

✓ **WHAT TYPE OF OVERALL DESTINATION SELECTION FEATURES WERE IMPORTANT TO THEM?**

These Aboriginal tourists placed their highest levels of importance on having opportunities to visit places where they could:

- increase their knowledge
- visit places not seen before
- experience unique places
- experience pristine natural environments

While not necessarily the most important reason for selecting BC, opportunities to pursue Aboriginal tourism represented about a quarter (25%) of the reason for their trip

✓ **WHAT WERE THEIR TRAVEL PATTERNS?**

Compared to other BC travellers these Aboriginal tourists were more apt to be:

- taking longer length trips (avg. 23 days)
- spending more days in BC (avg. 13days)
- including more days on Aboriginal experiences (avg. 2.9 days)
- traveling in larger travel parties (avg. of 3.7 persons)
- spending significantly more money on trip days (avg. \$559 per travel party / day)
- visiting more Aboriginal locations per trip (avg. 2.3 sites)

- visiting Aboriginal interpretive centres (24%), other attractions (21%), museums (21%), and festivals (13%)

✓ HOW SATISFIED WERE THEY WITH THEIR TRIPS?

With respect to various features of their overall BC trip, they tended to be:

- *most satisfied with:* opportunities to visit safe, unique, high quality natural environments that they had not visited before, as well as visit places where they could increase their knowledge of cultures
- *least satisfied with:* opportunities to take part in cultural activities, see unique / different Aboriginal groups, experience other Aboriginal heritage sites, try new foods, access comprehensive travel information prior to traveling, and pursue shopping options

With respect to specific features of their Aboriginal tourism experiences, they tended to be:

- *somewhat or very satisfied* (78%) with their overall Aboriginal experiences in BC
- *most satisfied with opportunities to:* view and / or purchase authentic Aboriginal crafts and handiwork, and tour Aboriginal museums and art galleries
- *least satisfied with opportunities to:* view / pursue Aboriginal sporting events, try Aboriginal cuisine, take part in nature-based activities in remote pristine areas with Aboriginal guides, and hear Aboriginal languages being spoken
- *not satisfied that:* enough opportunities to experience Aboriginal tourism sites / attractions / events existed (55%)

Their most positive impressions of Aboriginal tourism in BC tended to be associated with opportunities to:

- learn about Aboriginal culture / heritage (45%)
- learn about Aboriginal people (37%)
- experience Aboriginal friendliness and receptiveness to visitors (32%)
- appreciate Aboriginal arts and crafts (27%)
- experience connections between Aboriginal culture and environment (21%)

The chances of them returning to BC for Aboriginal tourism in the next three years were:

- very likely (40%) or somewhat likely (29%) to happen

✓ WHAT IS THE ABORIGINAL TOURISM COMPETITION?

The most frequently mentioned destination competitors tended to be other North American destinations such as:

- the United States (77%), other parts of Canada (64%), and Mexico (19%)

The most frequently used Aboriginal tourism products and services at these competing destinations tended to be:

- Aboriginal interpretive centres and / or related archaeological sites (33%), Aboriginal communities (17%), and other attractions (15%)

The most frequently mentioned competitive advantages of Aboriginal tourism in BC compared to these competitors were related to the:

- quality / uniqueness of Aboriginal arts, crafts, cuisine, and architecture (43%)
- willingness of Aboriginal peoples to share their knowledge and heritage (39%)
- accessibility of contemporary Aboriginal culture, communities, and events (25%)
- links between culture and natural environments (24%)

Overall Aboriginal tourism opportunities in BC were perceived to be slightly more competitive than that offered elsewhere in North America:

- about 44% of the travellers felt it was about equal in competitiveness
- another 35% of them felt it somewhat or substantially more competitive

Market Profile of Aboriginal Craft Travel Market

This summary profiles Aboriginal tourism travellers who participated in the 2003 pre and post-trip surveys *and who indicated that it was somewhat or very important for them have opportunities to view / purchase authentic Aboriginal crafts and handiwork in future trips to BC.*

About a quarter (28%) of all Aboriginal tourism travellers indicated that such opportunities were a priority consideration for them in future travels to the province. The report provides an overview of their travel characteristics and then offers more detailed information about their experiences related to Aboriginal tourism in this province and elsewhere. The information provided is an important portion of the market-driven foundation needed to create an overall strategy for Aboriginal tourism in BC.

v WHO WERE THESE ABORIGINAL TOURISM'S HANDICRAFT / ART TRAVELLERS?

Aboriginal Handicraft and Art Travellers tended to be:

- well-educated, middle income wage earners, female, older baby boomers
- primarily from overseas (34%), American (27%) and other Canadian (22%) locations

v WHAT TYPES OF TRIPS WERE THEY TAKING?

The trips pursued by these Aboriginal handicraft and art tourists were most apt to be:

- touring (59%) or visiting friends / relatives (12%) trips
- taken for leisure (76%) or visits to friends / relatives (16%) purposes

v WHAT PRE-TRIP PLANNING DID THEY DO?

Pre-trip planning done by these travellers tended to involve:

- about half (51%) of them having pre-trip familiarity with Aboriginal tourism in BC
- about two fifths (40%) of them finding the pre-trip information needed for the Aboriginal portion of their trip
- the vast majority (87%) of them organizing most of their trip on their own
- the vast majority (84%) of them doing most of their advanced planning at least 3-8 weeks in advance
- the largest proportion (55%) of them not using formal travel trade or tourism organization information channels for trip booking purposes
- the largest proportion (65%) of them using the Internet for trip planning purposes

√ WHAT TYPE OF OVERALL DESTINATION SELECTION FEATURES WERE IMPORTANT TO THEM?

These Aboriginal tourists placed their highest levels of importance on having opportunities to visit places where they could:

- increase their knowledge
- visit places not seen before
- experience unique places
- experience pristine natural environments

While not necessarily the most important reason for selecting BC, opportunities to pursue Aboriginal tourism represented about a quarter (28%) of the reason for their trip

√ WHAT WERE THEIR TRAVEL PATTERNS?

Compared to other BC travellers these Aboriginal tourists were more apt to be:

- taking very similar length trips (avg. 23 days)
- spending more trip days in BC (avg. 15 days)
- including Aboriginal experiences on about the same number of days (avg. 2.5 days)
- traveling in larger travel parties (avg. of 3.7 persons)
- spending more same amount of money on trip days (avg. \$551 per travel party / day)
- visiting about the same number of Aboriginal locations (avg. 2.3 sites)
- visiting Aboriginal interpretive centres (34%), museums (20%), other attractions (20%) and festivals (14%)

v HOW SATISFIED WERE THEY WITH THEIR TRIPS?

With respect to various features of their overall BC trip, they tended to be:

- *most satisfied with:* opportunities to visit safe, unique, high quality natural environments that they had not visited before, as well as visit places where they could take part in outdoor activities, increase their knowledge of cultures as well as shop
- *least satisfied with:* opportunities to experience other Aboriginal heritage sites, take part in cultural activities, try new foods, including those associated with Aboriginal heritage and groups

With respect to specific features of their Aboriginal tourism experiences, they tended to be:

- *somewhat or very satisfied* (79%) with their overall Aboriginal experiences in BC
- *most satisfied with opportunities to:* view and / or purchase authentic Aboriginal crafts and handiwork, and tour Aboriginal museums and art galleries
- *least satisfied with opportunities to:* view / pursue Aboriginal sporting events, take part in nature-based activities in remote pristine areas with Aboriginal guides, and hear Aboriginal languages being spoken
- *not satisfied:* that enough opportunities to experience Aboriginal tourism sites / attractions / events were available (55%)

Their most positive impressions of Aboriginal tourism in BC tended to be associated with opportunities to:

- learn about Aboriginal culture / heritage (48%)
- experience Aboriginal friendliness and receptiveness to visitors (32%)
- appreciate Aboriginal people (37%) and their arts and crafts (29%)

The chances of them returning to BC for Aboriginal tourism in the next three years were:

- very likely (44%) or somewhat likely (28%) to happen

v WHAT IS THE ABORIGINAL TOURISM COMPETITION?

The most frequently mentioned destination competitors tended to be other North American destinations such as:

- the United States (77%), other parts of Canada (69%), and Mexico (18%)

The most frequently used Aboriginal tourism products and services at these competing destinations tended to be:

- Aboriginal interpretive centres and / or related archaeological sites (33%), Aboriginal communities (18%), and Aboriginal museums (15%)

The most frequently mentioned competitive advantages of Aboriginal tourism in BC compared to these competitors were related to the:

- quality / uniqueness of Aboriginal arts, crafts, cuisine, and architecture (42%)
- willingness of Aboriginal peoples to share their knowledge and heritage (39%)
- links between Aboriginal culture and natural environments in tourism (26%)

Overall Aboriginal tourism opportunities in BC were perceived to be slightly more competitive than that offered elsewhere in North America:

- about 42% of the travellers felt it was about equal in competitiveness
- another 38% of them felt it somewhat or substantially more competitive

Market Profile of Aboriginal Sport Travel Market

This summary profiles Aboriginal tourism travellers who participated in the 2003 pre and post-trip surveys *and who indicated that it was somewhat or very important for them have opportunities to take part in Aboriginal sporting events during future trips to BC.*

About 39% of all Aboriginal tourism travellers indicated that such opportunities were a priority consideration for them in future travels to the province. The report provides an overview of their travel characteristics and then offers more detailed information about their experiences related to Aboriginal tourism in this province and elsewhere. The information provided is an important portion of the market-driven foundation needed to create an overall strategy for Aboriginal tourism in BC.

v WHO WERE THESE SPORTS ORIENTED ABORIGINAL TRAVELLERS?

Sports Oriented Aboriginal travellers tended to be:

- well-educated, lower-middle income wage earners, female, younger baby boomers
- from overseas (39%), American (22%) and other Canadian (21%) locations

v WHAT TYPES OF TRIPS WERE THEY TAKING?

The travels pursued by these Sports Oriented Aboriginal travellers were most apt to be:

- touring (60%) or visiting friends / relatives (12%) trips
- for leisure (75%) or visiting friends and relatives (15%) purposes

v WHAT PRE-TRIP PLANNING DID THEY DO?

Pre-trip planning done by these travellers tended to involve:

- about half (49%) not having pre-trip familiarity with Aboriginal tourism in BC
- over a third (39%) of them being able to find the pre-trip information needed for the Aboriginal portion of their travel
- the vast majority (83%) of them organizing most of their trip on their own
- the vast majority (80%) of them doing their planning at least 3-8 weeks in advance
- the largest proportion (54%) of them not using formal travel trade or tourism organization information channels for trip booking purposes
- the largest proportion (63%) of them using the Internet for trip planning purposes

v WHAT TYPE OF OVERALL DESTINATION SELECTION FEATURES WERE IMPORTANT TO THEM?

These Aboriginal tourists placed their highest levels of importance on having opportunities to visit places where they could:

- increase their knowledge
- visit places not seen before
- experience unique places
- experience pristine natural environments

While not necessarily the most important reason for selecting BC, opportunities to pursue Aboriginal tourism represented almost a third (30%) of the reason for their trip

v WHAT WERE THEIR TRAVEL PATTERNS?

Compared to other BC travellers these Aboriginal tourists were more apt to be:

- taking longer length trips (avg. 26 days)
- spending more days in BC (avg. 14 days)
- including more days on Aboriginal experiences (avg. 3.5 days)
- traveling in larger travel parties (avg. of 4.4 persons)
- spending significantly more money on trip days (avg. \$677 per travel party / day)
- visiting fewer Aboriginal locations per trip (avg. 2.2 sites)
- visiting Aboriginal interpretive centres (24%), other attractions (24%), festivals (16%) and museums

v HOW SATISFIED WERE THEY WITH THEIR TRIPS?

With respect to various features of their overall BC trip, they tended to be:

- *most satisfied with:* opportunities to visit safe, unique, high quality natural environments that they had not visited before, as well as visit places where they could increase their knowledge
- *least satisfied with:* opportunities to take part in cultural activities, see unique / different Aboriginal groups, experience other Aboriginal heritage sites, try new foods, and access comprehensive travel information prior to traveling

With respect to specific features of their Aboriginal tourism experiences, they tended to be:

- *somewhat or very satisfied (78%)* with their overall Aboriginal experiences in BC
- *most satisfied with opportunities to:* view and / or purchase authentic Aboriginal crafts and handiwork, and tour Aboriginal museums and art galleries
- *least satisfied with opportunities to:* view / pursue Aboriginal sporting events, try Aboriginal cuisine, take part in nature-based activities in remote pristine areas with Aboriginal guides, hear

Aboriginal languages being spoken, and experience Aboriginal tourism as part of broader tourism packages

- *not satisfied that:* enough opportunities to experience Aboriginal tourism sites / attractions / events existed (55%)

Their most positive impressions of Aboriginal tourism in BC tended to be associated with opportunities to:

- learn about Aboriginal culture / heritage (46%)
- learn about Aboriginal people (44%)
- experience Aboriginal friendliness and receptiveness to visitors (35%)
- appreciate Aboriginal arts and crafts (21%)

The chances of them returning to BC for Aboriginal tourism in the next three years were:

- very likely (46%) or somewhat likely (26%) to happen

√ WHAT IS THE ABORIGINAL TOURISM COMPETITION?

The most frequently mentioned destination competitors tended to be other North American destinations such as:

- the United States (75%), other parts of Canada (67%), and Mexico (22%)

The most frequently used Aboriginal tourism products and services at these competing destinations tended to be:

- Aboriginal interpretive centres and / or related archaeological sites (33%), Aboriginal communities (18%), and other attractions (12%)

The most frequently mentioned competitive advantages of Aboriginal tourism in BC compared to these competitors were related to the:

- quality / uniqueness of Aboriginal arts, crafts, cuisine, and architecture (41%)
- willingness of Aboriginal peoples to share their knowledge and heritage (44%)
- linkage between Aboriginal culture and natural environment (26%)

Overall Aboriginal tourism opportunities in BC were perceived to be slightly more competitive than that offered elsewhere in North America:

- about 48% of the travellers felt it was about equal in competitiveness
- another 32% of them felt it was somewhat or substantially more competitive

Appendix I: Aboriginal Organizations for Tourism

Organization	Federal	Provincial	Aboriginal	Organization / Program	Marketing	Business – Support	Business Financing	Human, Education & Training	On-Reserve Community	Language & Culture	Research & Advocacy	Other / Misc.
Aboriginal Business Canada (Industry Canada)	✓			✓	✓	✓	✓					
Aboriginal Business Services Network	✓					✓						
Aboriginal Capital Corporations			✓				✓					
Aboriginal Employment Centres			✓					✓			✓	
Aboriginal Financial Officers Association			✓					✓				
Aboriginal Friendship Centres			✓					✓		✓		
Aboriginal Human Resources Labour Agreements			✓					✓			✓	
Aboriginal post secondary institutes			✓					✓				
Aboriginal Sport Recreation Association of BC			✓					✓	✓			✓
Aboriginal Tourism Canada			✓		✓	✓		✓	✓	✓		
Aboriginal Workplace Partnership Initiative			✓					✓				
BC Government – First Citizens Fund		✓		✓			✓					
BC Government – various Ministries		✓		✓			✓	✓		✓		
Business Development Centres			✓	✓			✓	✓				
Canada / BC Business Services Centre	✓					✓						
Canadian Heritage	✓			✓	✓					✓	✓	
Community Futures Organizations	✓		✓	✓		✓	✓	✓				
First People Language Foundation			✓					✓		✓	✓	
First Nations Agriculture Association / Lending Association			✓	✓			✓				✓	✓
Human Resources Skills Development Canada	✓			✓				✓				
Indian Affairs and Northern Development	✓								✓			
National Aboriginal Business Association			✓			✓					✓	✓
National Aboriginal Forestry Association			✓								✓	✓
Native Fishing Association			✓								✓	✓
Privy Council Office	✓											✓
Parks Canada Agency	✓			✓	✓	✓		✓		✓	✓	✓
Western Diversification	✓			✓	✓	✓	✓	✓	✓			

Appendix J: Aboriginal Tourism British Columbia Market-Ready Standards



Aboriginal Tourism British Columbia (ATBC) visions a healthy, prosperous, proud, strong and dynamic Aboriginal tourism industry offering high quality products that exceed visitor's expectations.

The following criteria are used by ATBC when determining if an Aboriginal Cultural Tourism supplier is ready to work with ATBC in offering “market ready” products to international markets:

1. Must offer authentic Aboriginal cultural tourism experience.
2. International banking capability (if applicable).
3. Consistent point of contact. International communications capability and accept reservations by fax, email and direct phone line.
4. Printed brochure of product and consider development of a website offering information on your product.
5. If the business is a seasonal operation, it must be open and operating for the entire length of the main tourism season in BC (May through October). When the business closes for the season, the administrative office must remain open so clients may continue to work with the business and make advance bookings.
6. Set up billing arrangements with the operator, agency or receptive tour operator. Accept client vouchers as confirmation of payment for reservations.
7. Have a multi tiered rate system in order to support wholesale/retail and consumer direct (IE 25% off list for wholesaler, another 10% for retail). Must have an accounting system in place and be able to deal with “roll over deposits”. The tiered system will be different depending on what markets the product is being purchased in.
8. Product delivery that demonstrates quality, accuracy and consistency
9. Understanding how tour programs work (IE. The need to add pick up and drop off services from major centers to their site of operation).
10. Carry adequate insurance (minimum \$3 million liability insurance for adventure product suppliers, is recommended). This can be discussed with your receptive operator and they can add suppliers to their existing policies at nominal cost.
11. Understanding the tourism distribution network. The roles played by receptive tour operators (RTO's), tour operators/travel wholesalers, and retail travel agents. This includes an understanding of rack and retail pricing, agent commissions and wholesale net rates and client relationships at each level. Understanding the tourism distribution network. The roles played by receptive tour operators (RTO's), tour operators/travel wholesalers, and retail travel agents. This includes an understanding of rack and retail pricing, agent commissions and wholesale net rates and client relationships at each level.

Be willing to include receptive tour operators in your marketing and sales plan and implement a regular sales call program directed towards these operators (IE. ATBC Tradeshow participation).

Appendix K: Aboriginal Cultural Tourism Blueprint Strategy Response to Industry Issues and Constraints

During the research conducted for developing the Blueprint Strategy, many issues, constraints and concerns affecting the development of Aboriginal tourism were raised. Surveys were conducted with Aboriginal tourism operators, visitors and the travel trade, and community discussions held with First Nation representatives and Aboriginal tourism operators. These surveys and discussions revealed that many issues were common amongst stakeholder groups. The chart below summarizes the key issues and constraints to Aboriginal tourism development, as identified through the Situation Review and Community Consultations and other research processes underpinning the Blueprint Strategy. It also provides section references identifying where the Blueprint Strategy strives to address the issues and constraints. However, it must be noted that some of the issues and constraints could not be addressed by this report because they deal with internal community matters or are related to matters that are the responsibility of governments (e.g. access to land, policy frameworks, organization funding).

Issue/Constraint	Expressed By:					Action to Address Issue
	First Nation	Aboriginal Tourism Operator	Visitors	Travel Trade	Situation Review	
Awareness – Aboriginal leaders and communities do not understand tourism industry	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> ● Implement Aboriginal community development program which will develop 'tourism friendly' Aboriginal communities ● ATBC to develop website with tourism industry information
Business training – business and marketing training required, lack of knowledge of how to develop and access lands and resources	✓	✓		✓	✓	<ul style="list-style-type: none"> ● Coaching/mentoring programs for start-up and non-market ready businesses ● Workshops, resource materials and on-line training resources
Community issues – community dynamics compromise success of tourism projects	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> ● Implement Aboriginal community development program
Community readiness – welcoming spirit, identification and designation of no-tourism areas	✓	✓	✓		✓	<ul style="list-style-type: none"> ● Destination (BC) Branding Program-<i>Klahow-ya</i> word-mark (brand) will be available to all industry stakeholders ● Implement Aboriginal community development program

Issue/Constraint	Expressed By:					Action to Address Issue
	First Nation	Aboriginal Tourism Operator	Visitors	Travel Trade	Situation Review	
Culture – protection of culture, non-authentic Aboriginal tourism products, protocols	✓	✓	✓		✓	<ul style="list-style-type: none"> • Develop cultural protection protocols, and product branding • Product branding and community development program will acknowledge cultural protocols • Communicate protocols to non-mainstream tourism partners via web-portal and other on-going communication
Environmental – negative impacts on environment, fear of loss of land and resources	✓	✓			✓	<ul style="list-style-type: none"> • Cultural protocols and/or product branding could include environmental standards
Financing – difficult to obtain grants and financing, lack of capital, available financing doesn't fit tourism industry cycles; lack of knowledge	✓	✓			✓	<ul style="list-style-type: none"> • Provide financing facilitation and training and mentoring in financial management • Provide entrepreneurship training including financing through the labour and human resources strategy
Funding of tourism support organizations – Aboriginal tourism organizations struggling with viability, unable to meet industry demands	✓	✓			✓	<ul style="list-style-type: none"> • Implementation Committee will determine a funding structure for ATBC
Human resources – finding, attracting, retaining Aboriginal employees	✓	✓			✓	<ul style="list-style-type: none"> • Raise awareness of tourism as a career and develop skills and knowledge for career advancement • Coaching/mentoring for start-up businesses and exiting but non-market ready businesses
Industry development – lack of linkages, networking, cooperative marketing, information sharing	✓	✓	✓		✓	<ul style="list-style-type: none"> • Web portal, annual workshops, newsletters and conferences will enhance communication and partnerships
Infrastructure – inadequate transportation, utilities and other infrastructure to support tourism	✓	✓		✓	✓	<ul style="list-style-type: none"> • Address transportation, utilities and infrastructure issues within the community development program
Land access – lack of access to land constrains tourism development	✓	✓			✓	<ul style="list-style-type: none"> • Address land access within the community development program
Management capacity – management skills in short supply in Aboriginal tourism sector	✓	✓			✓	<ul style="list-style-type: none"> • Mentoring and other training programs will address lack of managerial expertise

Issue/Constraint	Expressed By:					Action to Address Issue
	First Nation	Aboriginal Tourism Operator	Visitors	Travel Trade	Situation Review	
Marketing – not coordinated or effective, lack of integration with provincial/regional marketing	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> Aboriginal Cultural Tourism Coordinator will ensure integration with provincial/regional marketing campaigns Raise awareness of TBC and Regional tourism staff
Marketing – stereotyping issues, inappropriate use of images	✓	✓	✓		✓	<ul style="list-style-type: none"> Cultural protection protocols will address inappropriate use of images Industry standards and product banding initiatives will address stereotyping issues
Marketing information – lack of understanding of visitor characteristics, needs and expectations; lack of knowledge of how to market	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> Marketing support programs will provide workshops, resource materials and mentoring on marketing methods Ongoing research will provide up to date visitor characteristics information
Partnerships – more partnerships among Aboriginal organizations and between Aboriginal and non-Aboriginal operators and organizations; knowledge of 'how to'	✓	✓		✓	✓	<ul style="list-style-type: none"> Suggested partnerships with memorandums of understanding with the annual tourism industry conference and national, provincial, regional tourism marketing agencies Aboriginal cultural tourism coordinator will help facilitate partnerships between Aboriginal and non- Aboriginal tourism businesses
Policy frameworks – government policy frameworks are complicated and confusing	✓	✓			✓	<ul style="list-style-type: none"> Enhance communication and understanding of government policy via web portal
Product/service issues – consistency, reliability and quality, product standards needed	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> Implement product branding associated which is associated with market-driven standards

Issue/Constraint	Expressed By:					Action to Address Issue
	First Nation	Aboriginal Tourism Operator	Visitors	Travel Trade	Situation Review	
Product supply – not enough export ready product, not enough product overall, inadequate supply in/near highest visited locations (urban centres, national parks, key highways)	✓		✓	✓	✓	<ul style="list-style-type: none"> • Product-market match determined what Aboriginal cultural tourism products are in high demand • Coaching, mentoring and product branding will help existing non- market-ready businesses become market ready • Programs to raise awareness of tourism as a career and coaching/mentoring of new tourism businesses
Resources – need for access to tourism statistics and marketing, business resources	✓	✓			✓	<ul style="list-style-type: none"> • Evaluation will provide up-to-date tourism statistics • Communication programs will distribute tourism statistics and information
Tourism training – lack of Aboriginal people with tourism and hospitality training and experience	✓	✓		✓	✓	<ul style="list-style-type: none"> • Develop entrepreneur and career path training programs • Community development programs will raise awareness of tourism as a career
Visitor education – awareness regarding community protocols, privacy, sacred sites	✓	✓	✓		✓	<ul style="list-style-type: none"> • Communicate product branding standards • Communicate cultural protection protocols • Community development programs will include methods of communication with visitors