



# Aboriginal Cultural Tourism

# TOURISM SECTOR PROFILE

MAY 2014

## Aboriginal cultural tourism at a glance in British Columbia

British Columbia visitor participation (2010)	3.7 million	Total visitor spending (2011)	\$42 million
Visitor participation growth (2006-10)	+97%	Total visitor spending growth (2006-11)	+100%
Full-time jobs (2010)	1,800	Direct tax revenue (2011)	\$11.9 million
Top target markets: Canada, United States, Germany, South Korea, United Kingdom, and France			

Source: Aboriginal Tourism Association of British Columbia (AtBC)

## About Aboriginal cultural tourism

*Aboriginal cultural tourism* can be defined as travel that is motivated by or enriched by participation in Aboriginal culture, history, and / or lifestyles. It is a small, but rapidly growing sector of the British Columbia tourism industry. According to the Aboriginal Tourism Association of British Columbia (AtBC), which leads the development and marketing of the sector in the province, visitor spending on Aboriginal tourism totalled \$42 million in 2011, up from \$20 million in 2006.

AtBC is a non-profit stakeholder-based organization with a vision of *a prosperous and respectful Aboriginal cultural tourism industry sharing authentic products that exceed visitor expectations*. Current Aboriginal cultural tourism offerings include tour companies, outdoor adventure operators, art galleries, golf courses, restaurants, wineries, spas, cultural centres, heritage sites, museums, and a variety of accommodations from campgrounds to hotels and resorts.

Working closely with the Provincial Government, Destination British Columbia and the Government of Canada, AtBC released the Aboriginal Cultural Tourism Blueprint Strategy in 2005 to guide the growth of the province's Aboriginal tourism industry.

In 2013, AtBC unveiled its 5-year Next Phase 2012-17 strategy that is intended to build on the momentum of the Blueprint Strategy. To achieve a 10% growth per year, the strategy's primary objectives are to increase revenue to \$68 million, provide 4,000 full-time jobs, and develop 100 Market-Ready<sup>1</sup> Aboriginal tourism businesses.

<sup>1</sup> Market-Ready is a business that markets to potential visitors in the planning stages, communicates with potential visitors year-round, and is ready to accept advanced reservations, as well as meeting other criteria.

## Global volume

The number of overnight visits to British Columbia, which included some form of Aboriginal cultural tourism, increased by an estimated 97% between 2006 and 2010 to approximately 3.7 million visits, almost double the number from 2006.

This growth is most pronounced among the Canadian market (+106%) which accounts for approximately half the Aboriginal cultural tourism volume.

Overnight visits in British Columbia with Aboriginal cultural tourism component	2006 Thousands (,000)	2010 Thousands (,000)	2006-10 4 year % change
Canada	962	1,981	106%
United States	598	1,101	84%
Other	315	608	93%
<b>Total</b>	<b>1,875</b>	<b>3,689</b>	<b>97%</b>

Source: AtBC Performance Audit Report 2006-12 (2013)

This sector is growing exponentially, however Aboriginal cultural tourism products and activities currently tend to be sought out at the destination rather than serving as the primary travel motivation. The 2006 Travel Activities and Motivations Survey (TAMS) was a comprehensive survey of North American households examining the travel habits, activities and behaviours of Canadian and US residents. The survey revealed that 11% of Canadian visitors participated in Aboriginal cultural activities, but it was only a travel motivator for 3% of respondents when selecting a destination to visit. Similarly, 8% of US visitors participated in Aboriginal cultural activities, but only 3% of visitors indicated Aboriginal cultural tourism was a travel motivator.

## Markets of interest

According to the 2012-13 Global Tourism Watch report, British Columbia's top tourism markets are enthusiastic about Aboriginal cultural tourism experiences. Germany, South Korea, and United Kingdom are showing considerable interest in Aboriginal cultural tourism as these markets have indicated the importance of the opportunity to experience Aboriginal cultural tourism when selecting a destination. The level of importance these markets see Aboriginal cultural tourism having is positive, however British Columbia may not fully reap the benefits. Currently, these markets do not associate Aboriginal cultural tourism with Canada as much as they do with other countries. These markets, among others, strongly associate Aboriginal cultural tourism with Australia first and foremost; followed by the US and then Canada.

	GER †	SK †	UK †	AUS †	JP †
Top visitor markets	Aboriginal cultural tourism always/often important in destination selection:				
	75%	74%	56%	47%	41%
	Destination association: (among those indicating Aboriginal cultural tourism is important)				
Australia	47%	74%	63%	NA	41%
United States	23%	20%	13%	20%	24%
Canada	17%	22%	11%	22%	18%

Source: Global Tourism Watch (2012-13)

In North America, the importance of having an Aboriginal cultural tourism experience when selecting a destination to visit is more important for the US market than it is for the Canadian market. Much like other international markets, the US associates Aboriginal cultural tourism experiences the most with Australia. Canadians tend to associate their own country with the availability of Aboriginal cultural tourism experiences, showcasing their knowledge of such experiences.

	United States	Canada
North American markets	Aboriginal cultural tourism always/often important in destination selection:	
	60%	49%
	Destination association: (among those indicating Aboriginal cultural tourism is important)	
Australia	56%	49%
United States	NA	27%
Canada	15%	58%

Source: Global Tourism Watch (2012-13)

† Markets are Germany (GER), South Korea (SK), United Kingdom (UK), Australia (AUS), and Japan (JP).

A 2009 Canadian Tourism Commission study surveyed visitors from European markets (Germany, France, and United Kingdom) who were interested in Aboriginal cultural tourism. The study revealed that visitors from different markets have a desire to visit different parts of Canada to gain their Aboriginal cultural tourism experience. British Columbia and Alberta were the primary choices for United Kingdom and German visitors, while French visitors mentioned Québec first.

## Visitor characteristics

According to AtBC, the average Aboriginal cultural tourism visitor to British Columbia tends to be female, middle to late aged, well-educated, and earns an upper-middle income.

An Aboriginal cultural tourism visitor often includes an Aboriginal cultural tourism product or activity in their first visit to British Columbia. Visitors tend to primarily be from North American and European countries and visit British Columbia for an average of 13 days, with 3 days devoted to Aboriginal cultural tourism experiences. Primarily due to the longer length of stay, visitors who participate in Aboriginal cultural tourism spend more per trip than other visitors.

Aboriginal cultural tourism visitors under the age of 50 prefer active experiences such as canoeing, kayaking, dog-sledding, and horseback riding, while visitors aged 50+ prefer less vigorous experiences such as hiking, walks, nature observation, and indoor activities.

## Trends

There are considerable growth opportunities for the British Columbia Aboriginal cultural tourism industry. British Columbia's emerging markets, China, India and Mexico, show considerable interest in Aboriginal cultural tourism and place high importance on it when choosing a destination to visit. Much like British Columbia's top markets, these emerging markets are less aware of the Aboriginal cultural tourism opportunities Canada has to offer – Aboriginal cultural tourism experiences continue to be associated with Australia.

	China	India	Mexico
Emerging markets	Aboriginal cultural tourism always/often important in destination selection:		
	78%	76%	71%
	Destination association: (among those indicating Aboriginal cultural tourism is important)		
Australia	45%	35%	NA
United States	24%	26%	22%
Canada	17%	22%	27%

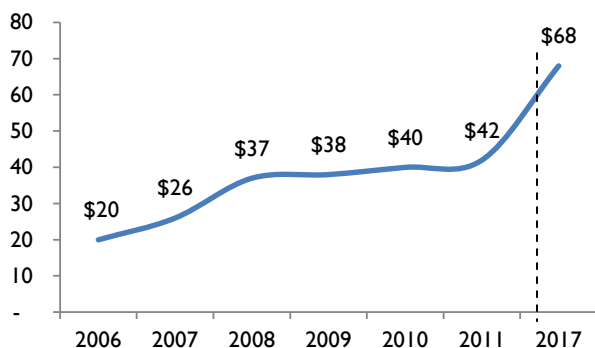
Source: Global Tourism Watch (2012-13)

## Economic value

While the Aboriginal cultural tourism industry is a small contributor to overall tourism revenue, it has recorded impressive growth in recent years, especially in an era of global economic uncertainty.

Revenue generated by the sector doubled between 2006 and 2011 and is forecasted to rise to \$68 million by 2017.

Revenue for the Aboriginal cultural tourism industry (\$ millions)



Source: AtBC The Next Phase: 2012-17 (2012)

Employment growth is also impressive with over 300 full-time jobs and nearly 100 part-time jobs created between 2006 and 2010, with an additional 1,700 jobs forecasted by 2017.

Employment	2006	2010	2006-10 4 year % change
Full-time	962	1,981	106%
Part-time	598	1,101	84%
<b>Total</b>	<b>1,875</b>	<b>3,689</b>	<b>97%</b>

Source: AtBC Performance Audit Report 2006-12 (2013)

In 2011, Aboriginal cultural tourism generated an estimated \$11.9 million in direct tax revenues for various levels of government. The growth in Aboriginal cultural tourism demand has resulted in business growth as well. While estimates of Aboriginal cultural tourism businesses vary, approximately 200 businesses were in operation in 2012, up 85% from 110 in 2006.

## Barriers to growth

Although Aboriginal cultural tourism-related visitation, revenues, tax contribution, and business ownership have all risen considerably since 2006, there are two significant challenges for the Aboriginal cultural tourism industry in British Columbia to address. The first is to bring awareness of Aboriginal cultural tourism opportunities in Canada, and specifically British Columbia, to the desired markets. The second is to ensure visitors have authentic (not staged) experiences when participating in Aboriginal cultural tourism products and activities.

When thinking of Aboriginal cultural tourism destinations, international visitors rarely have Canada come to mind as Australia is strongly associated with this product. The domestic market recognizes the strength of the Canadian product, however interest levels are generally lower.

To address the two primary challenges to this sector, there needs to be effective marketing and an increase number of authentic, market-ready products.

Recognizing the importance of authenticity in Aboriginal cultural tourism experiences, AtBC introduced an Aboriginal Cultural Tourism Authenticity Program in 2010. The program was designed to recognize, brand, and promote Aboriginal-owned cultural tourism experiences. AtBC is aiming to expand the program to include certification of authentic Aboriginal performers and artisan products.

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