



DESTINATION
CANADA



ABORIGINAL
TOURISM ASSOCIATION OF CANADA

Aboriginal Tourism
US Qualitative Research
Summary of Findings and Considerations

Canada



Study Background & Methodology

Study Background & Methodology

Background and Objectives

Aboriginal tourism in Canada has grown significantly in recent years. Given the close proximity and population density, the United States is a key market for future growth for the Aboriginal tourism industry.

In-depth qualitative research was conducted to gain a better understanding of US consumer perceptions of Aboriginal tourism experiences in Canada. The overall goals of the research were to:

- Increase demand for Aboriginal tourism experiences; and
- Support Aboriginal tourism businesses in Canada to compete and thrive internationally.

Methodology

Destination Canada engaged Insignia Marketing Research to conduct a total of 6 in-person focus groups in three cities in November 2016: Dallas, Los Angeles, and Boston.

The following segments were recruited in each city (1 group per segment):

- **Past visitors:** Have participated in an Aboriginal cultural experience, attraction, and/or celebration in Canada or somewhere else in the world (outside of their home state) in the past three years.
- **Interested:** Interested in participating in Aboriginal cultural experiences, attractions, and/or celebrations in Canada in the next two years.

Cautionary Note

The findings herein should be regarded as tentative hypotheses about the marketplace rather than as proven facts. This is inherent in the nature of this and any other qualitative research conducted with a small number of individuals.



Key Findings

Key Findings – Authenticity is Key

Authenticity appears to be a primary factor when considering Aboriginal tourism experiences.

For participants in this study, that means:

- One-on-one interaction with Aboriginal people, in small, intimate groups
- Learning about cultures, traditions, arts, food, storytelling, and history through active participation
- Connection to nature and the environment
- Adventure, both physical and mental
- Unique experiences



“I want to be a part of it, not just watching.”

“I want to learn about how they have done things for hundreds of years.”



“I want to be able to have them teach me directly how to do something their way.”

Commercialized, highly-staged and passive experiences and positioning are to be avoided.

Being a spectator or experiencing something that is highly staged is not of interest. Many complained of experiences that are too “touristy”, lack a genuine quality, and typically don’t represent the level of intellectual stimulation they want when travelling.

Visitors value a feeling that the culture is authentically represented, visitors are actively engaged, and it is not highly commercial or money-driven.

Key Findings – Authenticity is Key (cont.)

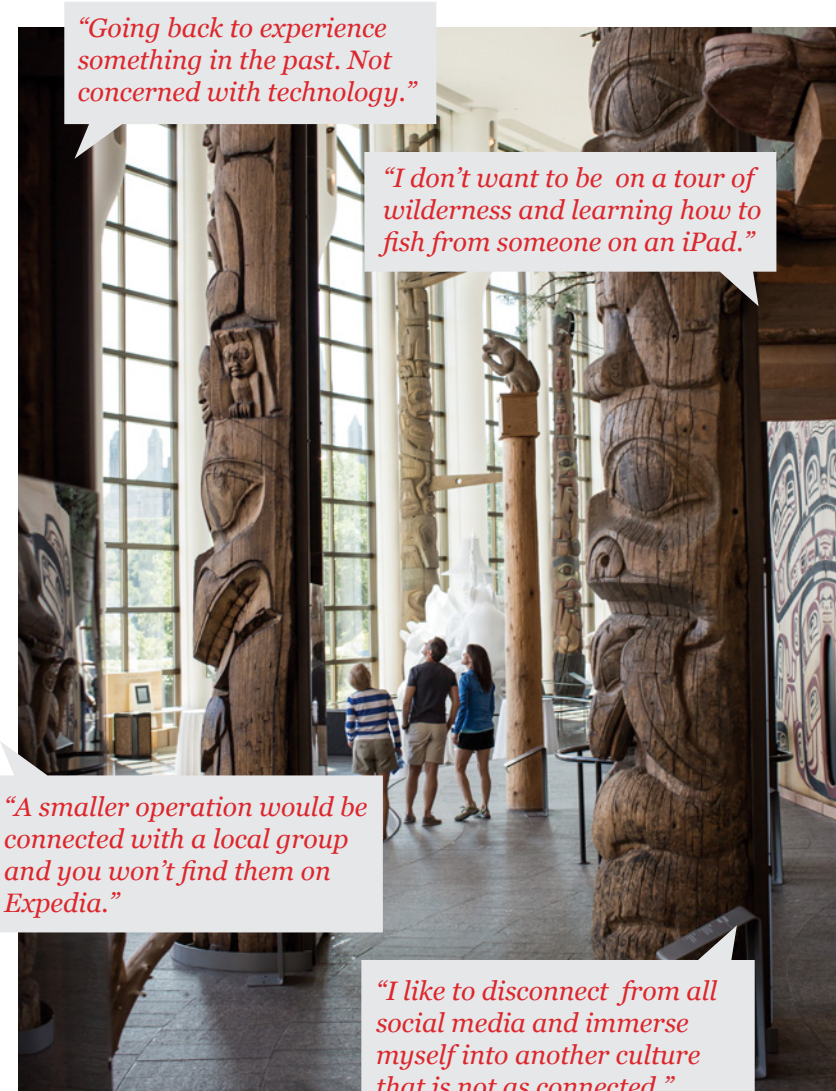
The assessment of authenticity is connected to major challenges for the Aboriginal tourism industry in Canada, including the idea that **many US travellers express a perception of Aboriginal cultures as somehow separate from the modern world** that they are familiar with, and use this as a touchstone for gauging authenticity. This sometimes leads to doubts as to whether or not truly authentic Aboriginal tourism experiences are even possible today.

A big part of this view has to do with modern technology

For many US travellers there is a sense that a truly authentic Aboriginal culture should exist in a world free from the technology that saturates their day-to-day lives. They imagine that Aboriginal people live “off-the-grid”, and expect that visitors would do the same if participating in an authentic Aboriginal tourism experience.

A general finding with the US traveller, from this and other studies, is a love-hate relationship with technology and their phones. They want to unplug and have a “media detox”, but they also can’t leave their phones behind.

Aboriginal cultural experiences tend to be **booked as an add-on** when the traveller is already at a destination, sometimes serendipitously and sometimes after specifically looking around for it, or are included in a trip simply because they were one part of a pre-booked package. This is at least in part because **they feel an authentic experience wouldn’t be advertised or booked online.**




“Going back to experience something in the past. Not concerned with technology.”

“I don’t want to be on a tour of wilderness and learning how to fish from someone on an iPad.”

“A smaller operation would be connected with a local group and you won’t find them on Expedia.”

“I like to disconnect from all social media and immerse myself into another culture that is not as connected.”

Key Findings – Interest is there, awareness is low



“When I travel I don’t just stay on the beach, but go see people in their homes, the food they eat and gain insights.”

“Every Sunday I look in the travel section and I rarely see anything on this kind of travel.”

“You connote it with Australia. It is not Australia specific, but when I hear the word ‘Aboriginal’ I immediately think ‘Australia’.”

“Not that much difference. Alaska would even be similar.”

There is an actively engaged segment of travellers in the US that is positively predisposed toward Aboriginal cultural experiences.

Positive past experiences and idealistic thoughts about future experiences drive this interest. These travellers value travel and unique experiences, and are willing to spend money on it. The most promising segment have sophisticated tastes in their travel interests (i.e. museums, art, history, culture).

Awareness and understanding of Aboriginal tourism in Canada are low.

Travellers say they are interested in participating in an Aboriginal cultural experience, but they are not able to define exactly what they’re looking for or what they would expect to find. There is also a lack of awareness of what Canada and Aboriginal people in Canada have to offer from a tourism perspective, and how it is different from the US.

Again, this is consistent with findings from other studies, where American travellers have positive feelings towards Canada but need more information on specific experiences that excite and engage them.

There is a lot of confusion over wording and definitions. US travellers are often unsure of the words to use to describe Aboriginal cultural experiences (i.e. ‘Aboriginal’ vs. ‘Indigenous’ vs. ‘First Nation’, etc.), and are confused about what those words mean (i.e. Aboriginal people vs. locals). They do not have a standard, accepted vocabulary around this type of tourism, and lack a clear understanding of who Aboriginal people are, especially in the context of visiting Canada.

Key Findings – Aboriginal Tourism differentiation

Despite low awareness and a general lack of understanding, US travellers believe that **Aboriginal cultural experiences stand out from more typical travel experiences. They imagine that it could transform a vacation from ordinary to extraordinary**, that it will provide long lasting memories, the chance for personal transformation and introspection, and a unique set of bragging rights.

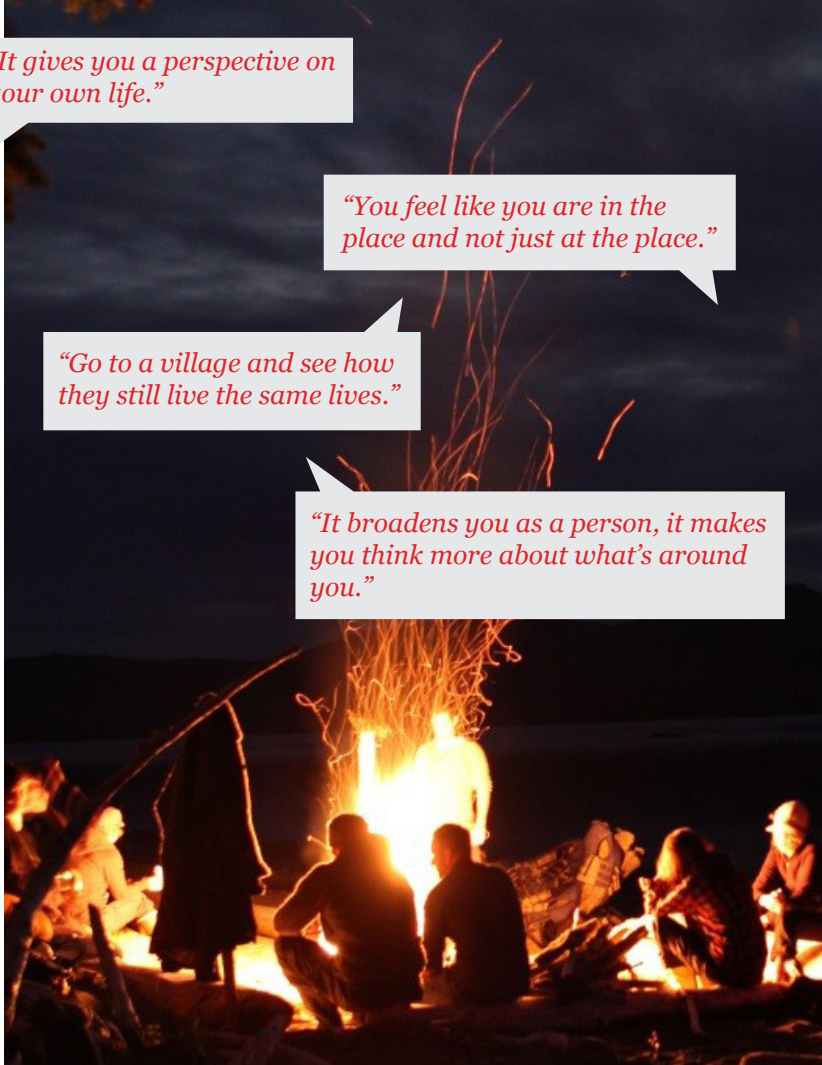
This type of travel is highly experiential and emotional, and is seen as providing the traveller with a different perspective on a destination as well as way of life.

It is a personal experience rather than a mass-produced experience.

The distinguishing criterion between personal and mass-produced experiences is the authenticity of the experience.

It means:

- A deeper connection with the environment,
- Experiencing a destination as opposed to just seeing it,
- Involvement in a one-of-a-kind adventure,
- An intimate and personal adventure.



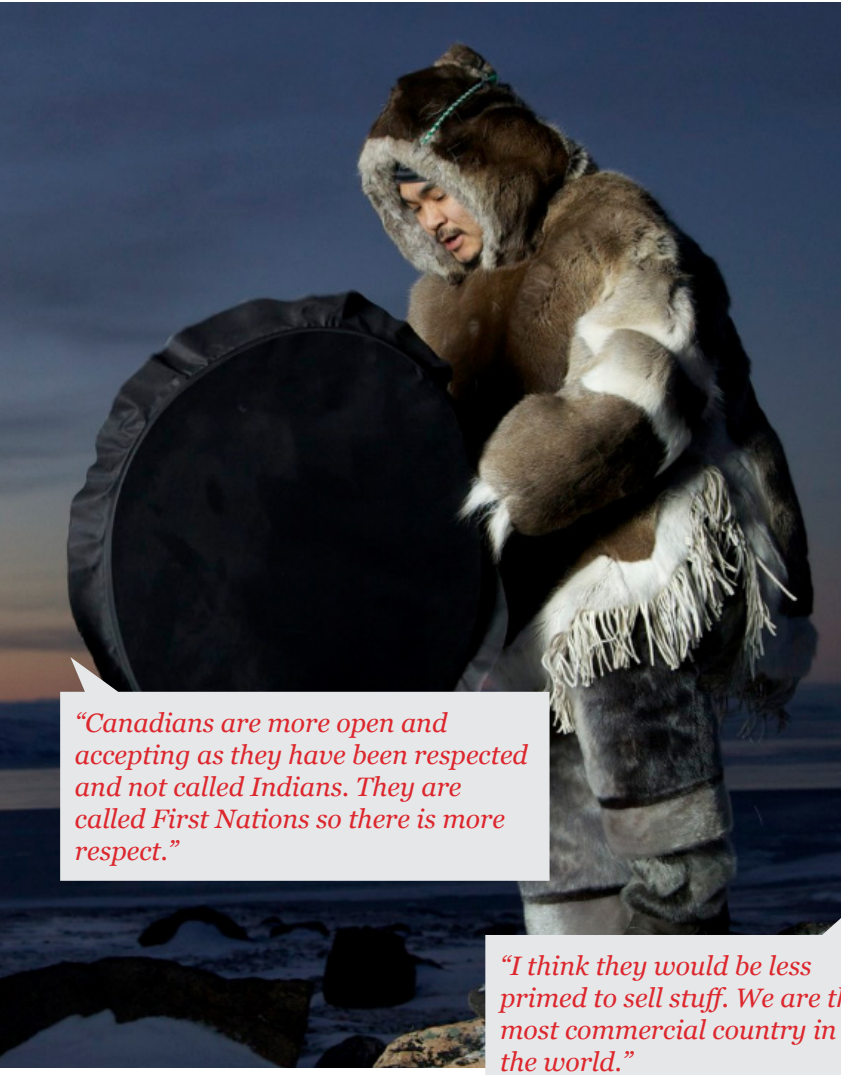
"It gives you a perspective on your own life."

"You feel like you are in the place and not just at the place."

"Go to a village and see how they still live the same lives."

"It broadens you as a person, it makes you think more about what's around you."

Key Findings – Canadian differentiation



“Canadians are more open and accepting as they have been respected and not called Indians. They are called First Nations so there is more respect.”

“I think they would be less primed to sell stuff. We are the most commercial country in the world.”

Impressions of Aboriginal tourism in the US are often negative, with the rationale centering mainly around ideas of commercialism and societal guilt from the historical mistreatment of Aboriginal peoples. Past experiences with less-than-inspiring “attractions” and frequently negative portrayal in the media feed into these impressions.

US travellers consider their country to be highly commercialized, and there is a perception that this broader trend would apply to Aboriginal cultures in the US as well. This leads to a general lack of trust in the authenticity of Aboriginal tourism experiences in the US, especially when advertised.

Based on what they learned in school and what they see in the news, **these American travellers feel guilty** about how the US has historically treated Aboriginal peoples in the past and continues to treat them today. For some, **this contributes to a perception that Aboriginal people in the US may not truly be interested in interacting with tourists or sharing their culture with them.**

Though not fully understood, these travellers express **a sense that an experience in Canada could be more authentic than in the US.**

Key Findings – Canadian differentiation (cont.)

US travellers are vaguely aware of Canada's size and regionality, and this typically works in Canada's favour in terms of differentiation.

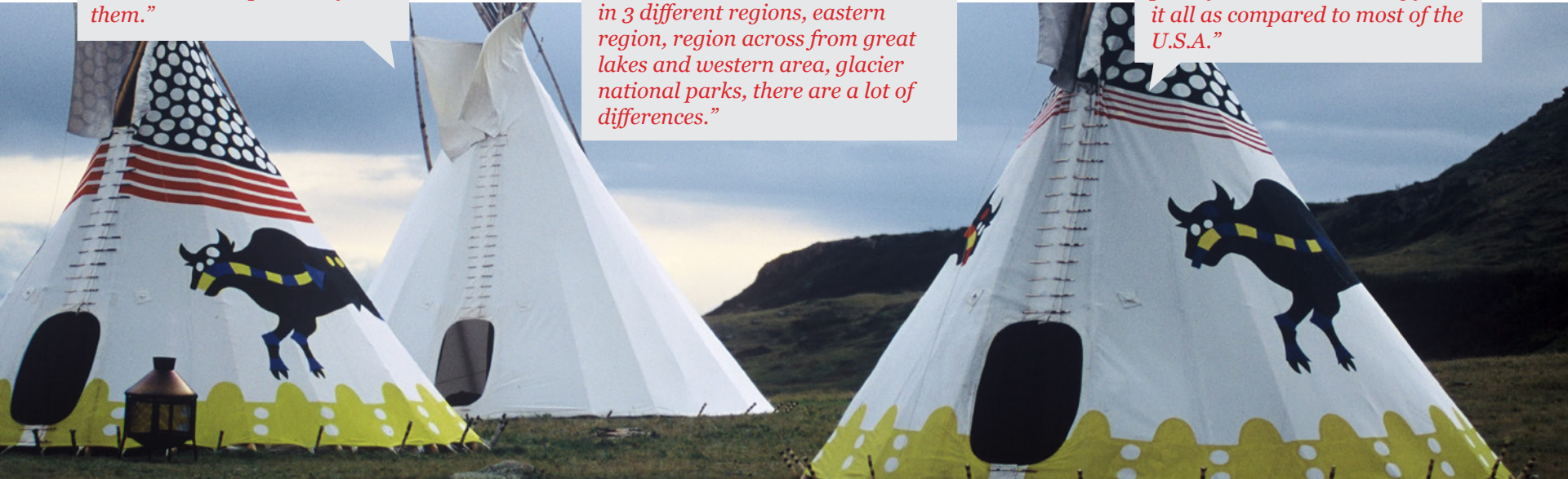
Perceptions of Canada as a more rural country with large expanses of land and varied landscapes contribute to the idea that there would also be a wide variety of different Aboriginal cultures and therefore a variety of different Aboriginal tourism experiences available. **However, there is also a related impression that authentic Aboriginal tourism experiences can only be found in rural areas, and do not exist in cities.**

However, US travelers feel that in Canada nature can be quickly and easily accessed from cities, providing the ability to “get away from it all” quickly.

“The population is more spread out, a lot more open land for them.”

“You are going north so it would be colder. Everything changes, way of life changes, seasons are totally different. I've been to Canada in 3 different regions, eastern region, region across from great lakes and western area, glacier national parks, there are a lot of differences.”

“Don't have to travel as far from the city especially the western part of Canada to be away from it all as compared to most of the U.S.A.”



Key Findings – Strong & Compelling Positioning

To evaluate potential brand positioning options, four potential positioning “territories” were explored. **Positioning that focused on personal connections and unique experiences resonated best** with US travellers in this research. They did not connect with positioning that was seen as too commercial.



Unique Experiences

Positioning experiences as more *experience-focused* through suggesting that travellers will have an authentic experience like no other through being guided by Aboriginal people. An experience they couldn't find anywhere else.

Personal Connections

Positioning experiences as more *interaction-focused* through suggesting a personal and authentic connection between the traveller and the Aboriginal people to get closer to the culture and nature.





Implications

Implications for Experience Design

What Americans told us

Authenticity is a primary factor in their decision-making when considering Aboriginal experiences, but they're not entirely sure what "authentic" really means in this context.

What this means for industry:

- Ensure that the culture being represented in an Aboriginal tourism experience is always shared in genuine and accurate way. Businesses should tell the story of their community's connection with the land in this geographic region, both historically and currently, and how that is represented through this particular tourism experience. This may help visitors feel an authentic connection with the community they are visiting, and better understand how Aboriginal people thrive in a modern society while still maintaining ties to ancient cultural traditions.
- Strive to use accurate language in description copy, including community or nation name. It may also be helpful to provide phonetic spelling where appropriate.
- Focus communications through more "organic" channels which allow for a more personal level of connection with consumers, such as social media and travel blogs, rather than more commercial advertising.

What Americans told us

They perceive experiences to be more authentic when they can "learn by doing".

What this means for industry:

- Present more hands-on tourism experiences. Focus on visitor learning through active participation, in small, intimate groups. Experiences should be interaction-focused, offering the opportunity for genuine connections with people and with nature. Avoid highly-staged, passive experiences.

Implications for When and How to Communicate

What Americans told us

They are interested in exploring Aboriginal tourism experiences in Canada, but overall awareness and understanding of Canada in general and the Aboriginal tourism industry in particular are very low.

What this means for industry:

- Don't assume American travellers know much about Canada, let alone your community. Provide as much information as possible.
- Develop and use a consistent vocabulary in all marketing, communications, product positioning, etc. Businesses should very clearly self-describe. This will help consumers to better understand who the Aboriginal peoples in Canada are, and how to talk about Aboriginal tourism experiences when sharing with friends.

What Americans told us

They tend to book Aboriginal tourism experiences as an add-on when they are already at a destination, or as one part of a pre-booked package.

What this means for industry:

- There are two key intervention points: increasing consumer awareness when they are thinking about where to go on vacation, and improving industry knowledge and advocacy at local destinations.
- Work closely with the travel trade – educate and collaborate to maximize their influence. This may include providing resources such as photos for marketing materials, geographical information, etc. You may refer to Destination Canada's [Export-Ready Criteria](#) for more detailed guidelines on how to best work with the travel trade.
- Work closely with destination marketing organizations to promote local awareness and determine the best way for your business to fit into larger itineraries.

Implications for How to Engage and Intrigue

What Americans told us

A great Aboriginal tourism experience is really personal and special, and can transform a vacation from ordinary to extraordinary.

What this means for industry:

- Position products as a highly personal experience rather than a mass-produced one. They should be interaction-focused, offering the opportunity for genuine connections with people and with nature. This will also help with perceptions of authenticity.
- Position products as a “must-do” experience in Canada that will offer the traveller a different perspective on a destination that they wouldn’t see otherwise.

What Americans told us

When they travel they are looking for really unique experiences that can’t just be found anywhere.

What this means for industry:

- Position Aboriginal tourism products in Canada as unique experiences that couldn’t be found anywhere else, and that an “average” tourism experience wouldn’t provide.
- Highlight the uniqueness of the Aboriginal culture being shared through each product, and the variety of unique cultures across Canada. This can be highlighted when presenting individual products or in general marketing.

