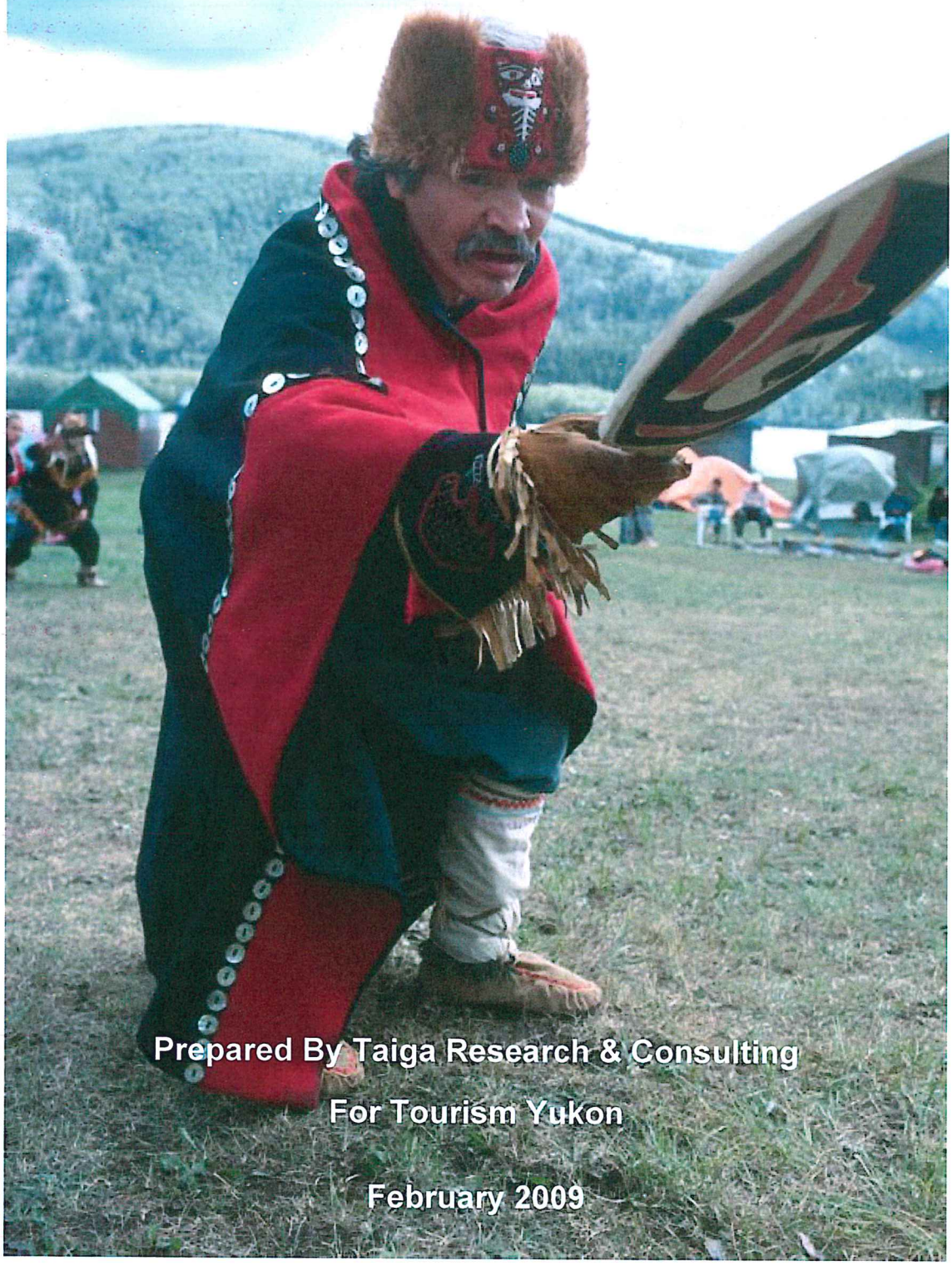
Demand for Aboriginal Cultural Tourism in Yukon



Prepared By Taiga Research & Consulting

For Tourism Yukon

February 2009

TABLE OF CONTENTS

EXECUTIVE SUMMARY **4**

BACKGROUND 4

METHODOLOGY 4

PURPOSE AND OBJECTIVES 5

KEY FINDINGS AND CONCLUSIONS 5

BACKGROUND **6**

LITERATURE REVIEW: KEY FINDINGS 6

PURPOSE AND OBJECTIVES 9

POPULATION AND SAMPLE FRAME **10**

POPULATION & SAMPLE PROFILE 10

LIMITATIONS 5

FINDINGS **11**

LEVELS OF INTEREST IN ABORIGINAL TOURISM 11

Interest in Aboriginal Tourism in Yukon 11

Importance of Aboriginal Tourism in Destination Choice 12

Previous Participation in Aboriginal Tourism 15

INTEREST IN PARTICULAR PRODUCTS AND EXPERIENCES 17

Quantitative Findings 17

Open-Ended Responses 22

CHARACTERISTICS OF EXPERIENCES SOUGHT 23

Preferred Number of Experiences 23

Preferred Length of Experiences 24

Preferred Price Ranges 25

INFORMATION SEEKING BEHAVIOUR 29

Pre-Trip Information Seeking 29

Information Seeking During Trips in Yukon 31

BENEFITS SOUGHT IN CULTURAL TOURISM 32

Quantitative Findings 32

Open-Ended Responses 35

CONCLUSIONS **38**

General Interest Levels are High 38

Foreign Travelers Attach Greater Importance to Aboriginal Culture 38

Female Travelers Show Greater Interest 38

Aboriginal Culture is a Secondary Draw 39

Prior Participation is a Predictor of Future Participation and Interest 39

Pre-Trip Information Seeking is Minimal 39

During-Trip Information Seeking Relies on Local Knowledge 40

Price Ranges Vary Widely 40

Learning-Centred Experiences are Sought 41

Interest Spans Historical and Contemporary Cultures 41

Nature-Based and Aboriginal Tourism are Complementary 41

Younger Travelers Desire More Active Engagement 42

Independent and Organized Group Travelers Seek Different Benefits 43

APPENDICES **44**

APPENDIX A: Literature Review: Demand for Aboriginal Cultural Tourism 44

APPENDIX B: Survey Methodology 65

APPENDIX C: A Note On Terminology 73

APPENDIX D: Questionnaire: Aboriginal Tourism Survey 5

REFERENCES **4**

EXECUTIVE SUMMARY

BACKGROUND

Tourism is a major component of Yukon's economy. In 2007, 329,203 travelers visited Yukon, an increase of four percent over 2006 (Tourism Yukon, 2008c). Spending by visitors in the same year totaled $65 million (DataPath Systems, 2007). Little data, however, is available regarding the levels of interest and awareness among these tourists of Aboriginal cultural tourism products and experiences in the specific context of the Yukon. In order for Aboriginal cultural tourism businesses to identify areas of demand and effectively target advertising, more information was needed.

To this end, the Yukon Department of Tourism and Culture, in association with the Yukon First Nation Tourism Association (YFNTA), developed a survey to investigate demand for First Nation tourism experiences in the Yukon. This survey was intended to comprise the first phase of a multi-component Yukon First Nation Tourism Strategy. Research was conducted between May and August 2008 by staff at the Department of Tourism and Culture, in consultation with YFNTA. The present document outlines the results obtained from this research.

METHODOLOGY

The focus of this study was current travelers to the Yukon over 18 years of age. A questionnaire was administered to 458 respondents between June and August 2008. The majority of respondents (89 percent) were given a paper version of the questionnaire for self-administration. The remaining 11 percent were administered the questionnaire by an interviewer. The two interviewers were anthropology students hired by the Department of Tourism and Culture to work as research assistants on the Aboriginal Tourism project.

Paper questionnaires were distributed in several locations in Whitehorse, as well as at all six Visitor Information Centres in the Yukon. Face-to-face intercepts were conducted only in Whitehorse. The margin of error for our results is +/-4.5 percent, with a confidence level of 95 percent.

PURPOSE AND OBJECTIVES

The purpose of this research was, broadly, to better understand the demand for Aboriginal cultural tourism products and experiences among visitors to the Yukon.

The study's specific objectives were as follows:

- To examine visitors' existing awareness of Yukon Aboriginal cultural tourism products and experiences.
- To identify the types of Aboriginal cultural tourism products and experiences in greatest demand in Yukon.
- To profile the visitors most attracted to Aboriginal cultural tourism products and experiences in Yukon by age, gender, country of origin, travel mode, trip length and trip planning behaviour.

KEY FINDINGS AND CONCLUSIONS

A number of conclusions relevant to the development of Aboriginal tourism businesses and products in Yukon were determined upon analysis of the data. Many areas of overlap are apparent with the results of similar research undertaken elsewhere in Canada and abroad. However, particular findings appear to reflect more specifically the context of First Nations cultural tourism in Yukon.

A detailed description of the findings can be accessed in the "Findings" section of the present document (beginning on page 11). Further explanation and interpretation can be found in

the "Conclusions" section (beginning on page 38). Overall, however, the data indicated the following trends and patterns:

- General interest in Aboriginal cultural tourism experiences in Yukon is high.
- Foreign travelers attach greater importance to Aboriginal culture than do North American travelers.
- Female travelers show greater interest in Aboriginal tourism experiences than do males.
- Aboriginal culture is not the primary draw for most tourists, but may be a factor in decisions to visit Yukon.
- Those who have participated in Aboriginal cultural experiences before are likely to do so again.
- Pre-trip information seeking is minimal, especially among North American travelers.
- Information seeking during trips relies heavily on local knowledge and word-of-mouth.
- Different travelers will pay very different prices for Aboriginal cultural experiences.
- Most travelers interested in Aboriginal culture are primarily looking for a learning-centred experience.
- There is interest in both contemporary and historical events and culture.
- Aboriginal people are viewed as being closely connected with "nature" and possessing unique knowledge of the natural environment.
- Older travelers are often more interested in passive learning experiences, while younger travelers desire more active adventures.
- Independent travelers and those in organized groups seek different travel experiences and different benefits.



BACKGROUND

LITERATURE REVIEW: KEY FINDINGS

In order to better understand the issues surrounding Aboriginal cultural tourism in general before focusing on the Yukon context, a thorough review of the literature around cultural tourism was conducted prior to the development and implementation of the survey. Relevant journal articles and government documents from Canadian and international contexts were reviewed, and a number of major research themes were identified and explored in greater detail. These themes included the nature and intensity of overall demand for aboriginal tourism experiences, the uncertain relationship between expressed interest and participation in cultural tourism activities, the segmentation of visitors to cultural experiences (both through demographic data and through more subjective measures), the concept of "authenticity," and the relationship between nature-based and culture-based tourism attractions.

The literature contains many uncertainties relating to levels of demand for cultural tourism experiences. While many surveys have indicated high levels of stated interest on the part of actual and potential travelers (e.g. Insignia Research, 2007; TNS Canadian Facts, 2007), some authors have questioned the degree to which this stated interest corresponds to actual participation in cultural tourism activities (Ryan and Huyton, 2000; 2002; Ryan and Higgins, 2006).

Most researchers agree that only a small segment of the market is interested *primarily* in Aboriginal tourism products, and that it is therefore generally a better strategy to develop businesses and attractions that can serve as a *secondary* draw, or a value-added to more mainstream attractions (Ryan and Higgins, 2006; Ryan and Huyton, 2002; McKercher, 2002; ATTC, 2001). In the context of Yukon, these primary attractions are likely to involve the natural environment and be focused around outdoor and/or wilderness activities, as these are the biggest motivating factors for the majority of travelers to Yukon. Indeed, this is an area of tourism in which First Nation businesses

may have an advantage, in that many travelers perceive Aboriginal people as being "close to the land" or having unique knowledge of the local landscape and its flora and fauna (Insignia Research, 2007, p. 18).

Case studies from a number of countries have shown that there are many different motivations for visiting Aboriginal cultural experiences. For example, Chang's (2006) study of visitors to an Aboriginal festival in Taiwan showed significant differences among the sample in both levels of interest and specific motivations. Other authors (e.g. McKercher, 2002; Moscardo and Pearce, 1999) have also shown that visitors to cultural tourism attractions are motivated by different desires and therefore expect different experiences. A number of scholars have tied the question of motivations to issues of "authenticity" in the touristic experience. Cohen, in fact, has suggested a typology of tourists based on their level of desire for authenticity.

Authenticity is a much-debated concept in the academic tourism literature (e.g. Chhabra, Healy and Sills, 2003; Wang, 1999; Yeoman et al., 2007). The few points of consensus appear to be that (1) there is a great deal of variation in the levels of importance attached to authenticity by tourists, (2) there is likewise considerable variation in what it means to different tourists, and how its presence or absence is judged, and (3) the perceived need for communities and businesses to provide what tourists consider to be "authentic" experiences often presents challenges due to potential disconnects between the reality of operating a tourism business and the expectations of tourists, which sometime are based upon false and/or outdated images of Aboriginal people.

In addition to motivations, levels of interest, and desire for "authenticity," cultural tourists can be segmented based on sociodemographic information (Kim et al., 2007). Origin (country and region, as well as cultural and geographic proximity to the target cultural attraction), educational background, economic and occupational classification, marital status and gender may all be important factors (though the ways in which they affect cultural tourism differ depending on the

activity and the market region). Age, or generation, appears to be a particularly important variable, with baby-boomers consistently making up a large proportion of cultural tourists (O'Neil Marketing & Consulting et al., 2005a; Lang Research, 2007). Studies in the Canadian context have also found that those travelers interested in Aboriginal tourism tend to be those with greater than average incomes and levels of education (Lang Research, 2007; O'Neil Marketing & Consulting et al., 2005a). In addition, those who express interest in Aboriginal tourism products also tend to be those who express interest in outdoor and nature-based activities, as well as other cultural attractions (Price Waterhouse Coopers, 2000).

A more detailed analysis of these themes can be located in the full literature review, found in Appendix A of this report.

PURPOSE AND OBJECTIVES

In order to determine to what degree the patterns identified in the literature review apply to the Yukon context, survey research was undertaken by Tourism Yukon in June, July and August of 2008. The primary goal of this research was to better understand the demand for Aboriginal cultural tourism products among visitors to Yukon. Specific objectives included examining visitors' awareness of Yukon Aboriginal cultural tourism products, identifying the types of products most in demand in the Yukon, and profiling the visitors most attracted to these products and experiences. Areas of focus in the questionnaire therefore included prior participation in Aboriginal tourism experiences, information-seeking behaviour, motives for participating, levels of interest in particular products, and sociodemographic questions. Ultimately, the aim was to provide First Nation communities and businesses, as well as the Yukon tourism industry in general, with current, relevant and local data to use as a resource in tourism development and planning.

POPULATION AND SAMPLE FRAME

POPULATION AND SAMPLE PROFILE

The population of interest to us in this survey was actual visitors to the Yukon. Data from the 2004 Yukon Visitor Exit Survey (Tourism Yukon, 2006) and from the Yukon Visitor Statistics 2007 Year-End Report (Tourism Yukon, 2008c) were used to stratify our sample in order to achieve representation of different visitor groups. The sample needed to satisfy two requirements: (1) to include a sufficient number of respondents from all target groups (e.g. Germans, female travelers, RV travelers) to be statistically valid, and (2) to accurately represent the distribution of these groups in the general population of travelers to the Yukon. Sufficient responses were gathered from various target groups to satisfy the first criterion. The second criterion was satisfied through weighting the data by country of origin (the only area where the sample was substantially misrepresentative) to better reflect the demographics of Yukon travelers.

The final sample closely reflected the general population of Yukon travelers in most ways. The gender balance was fairly equal (just over half were female), and closely reflected the distribution between leisure and those traveling for business or personal reasons. The age categories represented in the YVES were also closely mirrored by our sample.

The two areas in which our sample differed significantly from the general demographic characteristics of travelers to Yukon were country of origin and mode of travel (independent versus organized group).

The sample marginally overrepresented independent travelers, due to logistical difficulties (discussed in Appendix B: Survey Methodology) around accessing individuals traveling in organized groups. However, the ratio obtained still provided highly representative data.

In addition, the sample over-represented Canadian travelers and foreign travelers from outside North America, while under-representing Americans. This was necessary in order to collect statistically valid data on foreign markets. In order to correct for the differences in country of origin

between our sample and the overall breakdown of Yukon visitors, data weighting techniques were employed. Where appropriate, a "weighted total" column has been incorporated into graphs to show the distribution of data once weighted by country of origin.

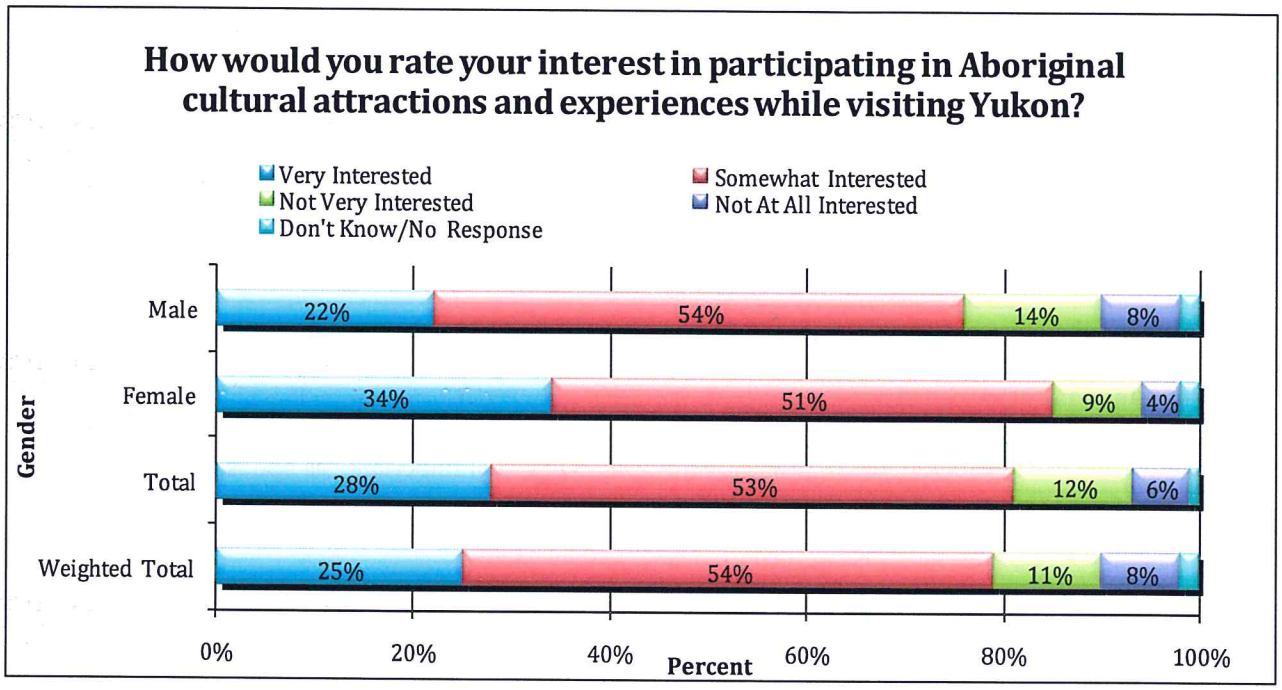
FINDINGS

LEVELS OF INTEREST IN ABORIGINAL TOURISM

Interest in Aboriginal Tourism in Yukon

Overall, respondents expressed fairly high levels of interest in participating in Aboriginal cultural tourism experiences while in Yukon. Twenty-eight percent of all respondents indicated that they were "very interested" in participating in Aboriginal cultural experiences and attractions while here. Another 53 percent indicated that they would be "somewhat interested." Together this comprises 82 percent of respondents (more than four in five) indicating some level of interest.

Female respondents indicated generally higher levels of interest in Aboriginal cultural tourism. Thirty-four percent of female respondents indicated that they were "very interested," with another 51 percent reporting that they were "somewhat interested." Conversely, only 22 percent of



male respondents indicated that they were "very interested," while 54 percent reported that they were "somewhat interested." This corresponds with the findings of other research in the Canadian context, which also indicated that those interested in Aboriginal cultural tourism were more likely to be female (e.g. O'Neil Marketing & Consulting et al., 2005).[1]

There appeared to be a tendency for foreign travelers, and German travelers in particular, to rate their interest more highly than North Americans; however, the difference was not large enough to be statistically significant. Small sample sizes may have played a role here.

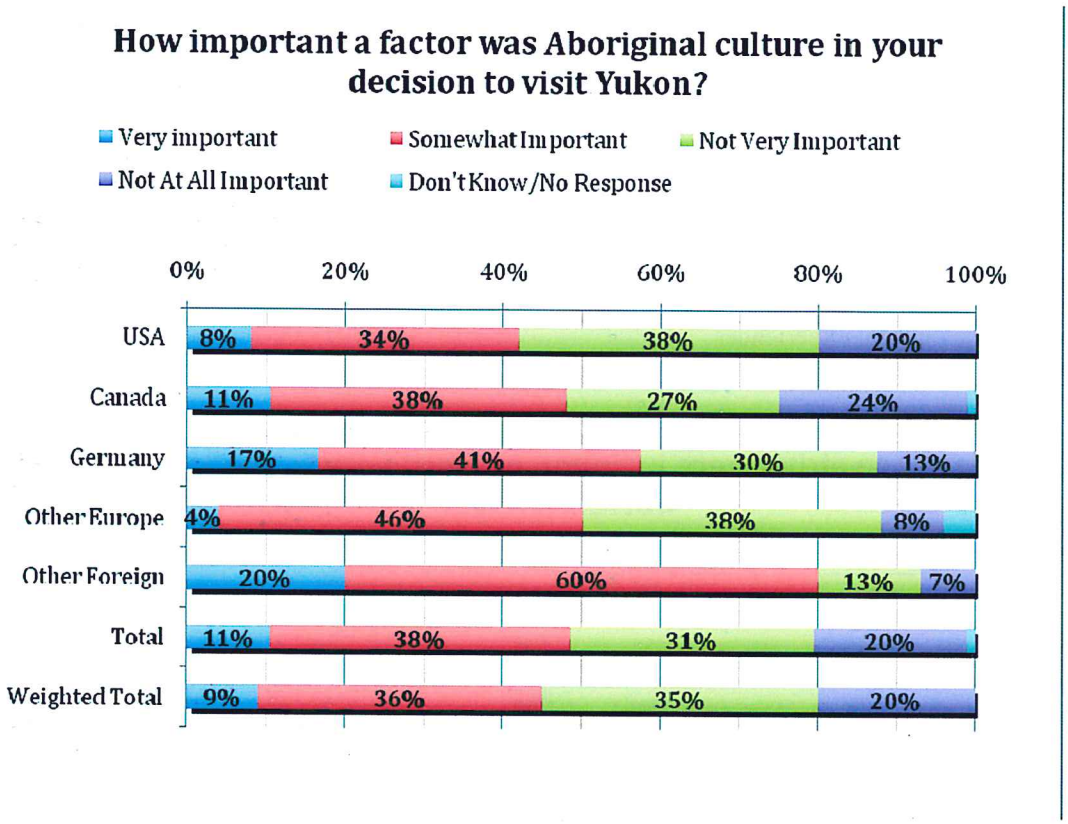
[1] The weighted total column in the chart refers to total data, weighted by country of origin. All weighted total columns throughout the present document are by country of origin.

Importance of Aboriginal Tourism in Destination Choice

Although respondents rated their interest in Aboriginal cultural experiences quite highly, fewer respondents reported that having the opportunity to participate in such experiences was a major factor in their choice to come to Yukon. Overall, only one in ten participants reported that Aboriginal culture was a "very important" factor in their decision to visit Yukon. However, nearly 40 percent reported that it was "somewhat important."

Travelers from outside North America were significantly more likely to attach importance to Aboriginal culture in their choice of destination. While only eight percent of Americans rated Aboriginal culture as "very important," 16 percent of German travelers and 20 percent of travelers from foreign countries outside Europe gave the same response. German travelers and other Europeans were also more likely to state that it was "somewhat important" as opposed to Canadians and Americans.

Combined, 80 percent of foreign travelers from outside Europe and North America, and 58 percent of German travelers, indicated that Aboriginal culture was very or somewhat important to them in choosing to travel to Yukon, while only 42 percent of Americans and 48 percent of Canadian travelers indicated the same. Travelers from Europe (excluding Germany) fell in the middle of the range, with half indicating that Aboriginal culture was somewhat or very important to their choice of destination.



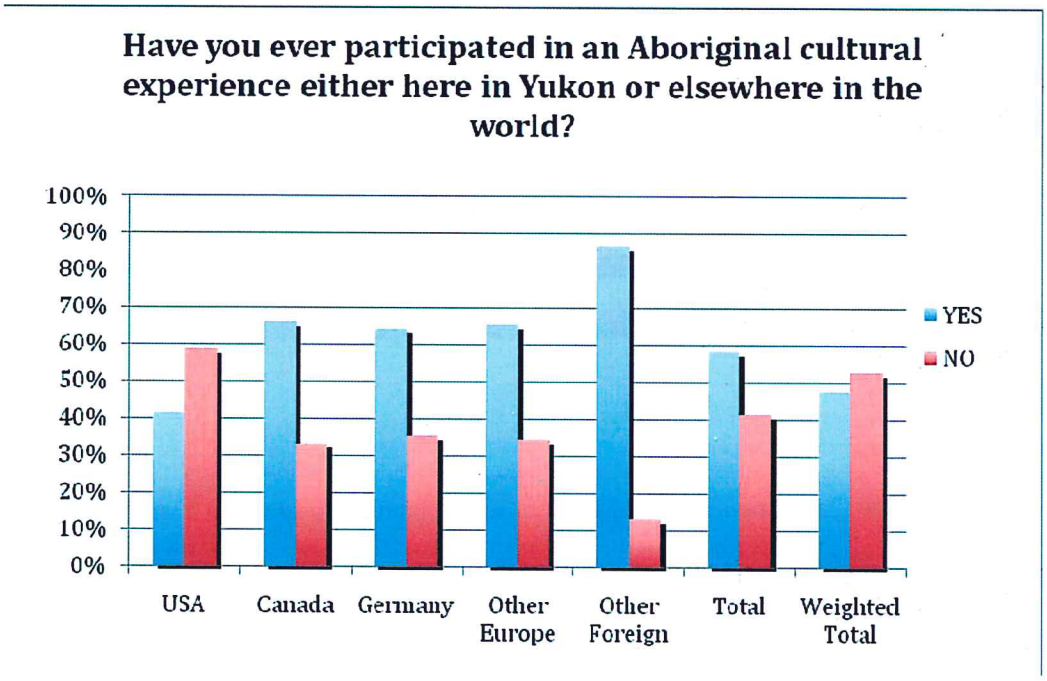
The length of time that respondents had spent or were planning to spend in Yukon on their current trip was also significant in the importance they attached to Aboriginal culture. Those spending more than two weeks tended to rate Aboriginal culture as more important in their decision to visit Yukon than those planning to stay for shorter periods of time. This may coincide with the fact that higher proportions of foreign travelers as opposed to North Americans tend to spend longer in Yukon. No significant difference was apparent, however, in the levels of interest shown in participating in Aboriginal experiences when compared by trip length.

The levels of importance attached to Aboriginal tourism should be interpreted with caution. A recent report for the CTC (Insignia Research, 2007) also found that the majority of travelers in the German, French and British markets stated that Aboriginal culture would be either "very important" or "somewhat important" to them on a trip to Canada. However, less than one percent of each group stated that it was the main reason for their travel, and less than one in five stated that it

was a reason for traveling at all. Opportunities for Aboriginal cultural tourism, therefore, do not appear to be a primary motivator for travel to Canada in general, or to Yukon in particular.

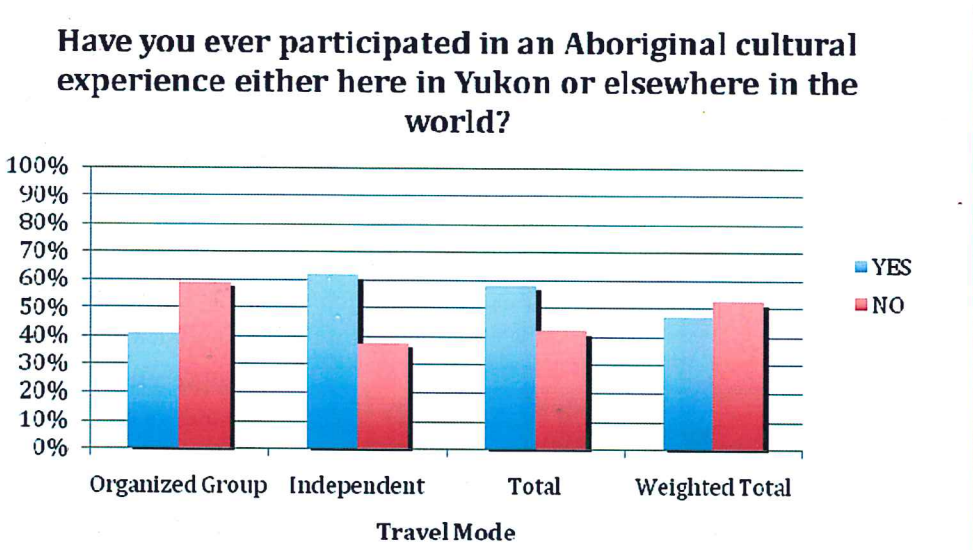
Previous Participation in Aboriginal Tourism

Nearly sixty percent of travelers indicated that they had previously participated in one or more Aboriginal cultural experiences.



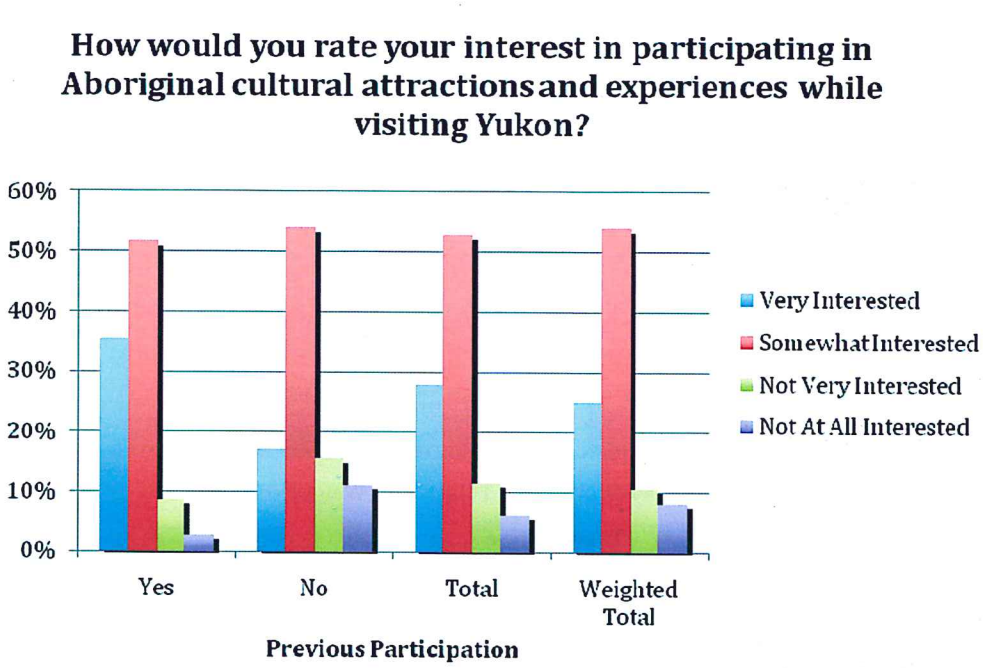
Significant differences were noted between American travelers and all others, with Americans being much less likely to have previously participated in Aboriginal cultural experiences.

Independent travelers were also much more likely to have participated previously in Aboriginal cultural experiences than were those traveling in organized groups. While over sixty percent of independent travelers indicated that they had participated in such an experience in the past, only forty-one percent of organized group travelers indicated prior participation.



Those traveling by car/truck or RV were also significantly more likely to have participated previously in an Aboriginal cultural experience, as opposed to motorcoach travelers or others. This reflects the divide between independent and group travelers: most motorcoach travelers were with an organized group, while most car, truck and RV travelers were independent.

Interestingly, those who stated that they had previously participated in an Aboriginal cultural experience were significantly more likely to express greater interest in doing so on their current trip. Of respondents who had previously participated in an Aboriginal cultural experience, 35 percent indicated that they were very interested in participating in this type of experience while visiting Yukon, and another 52 percent reported that they were somewhat interested. Of respondents who had not previously participated in an Aboriginal cultural experience, only 17 percent indicated that they were very interested in doing so on their current trip. Another 54 percent said that they were somewhat interested.



INTEREST IN PARTICULAR PRODUCTS AND EXPERIENCES

Quantitative Findings

Levels of interest varied significantly for different products and experiences. Respondents were given a list of particular types of Aboriginal cultural tourism experiences and asked to rate their interest in participating in each one on a scale from one to ten, with ten being very interested and one being not at all interested. A small number of "control" experiences were also listed in a previous question, consisting of examples of typical Yukon vacation activities not involving Aboriginal culture (e.g. "learning to pan for gold"). A full list of the experiences that respondents were asked to rate can be found in Questions 12 and 14 in the Questionnaire (Appendix D).

Overall, respondents rated Aboriginal cultural experiences very highly. The mean ratings for three of the four control experiences fell below the mean ratings for all of the Aboriginal cultural experiences listed. The five highest-rated overall experiences were:

- "Hearing about traditional uses of the land" (7.48/10)
- "Seeing the way Aboriginals used to live" (7.43/10)

- "Watching traditional crafts being made (e.g. carving, making moccasins)" (7.34/10)
- "Hearing Aboriginal legends" (7.32/10)
- "Interacting with local Aboriginal people" (7.17/10)

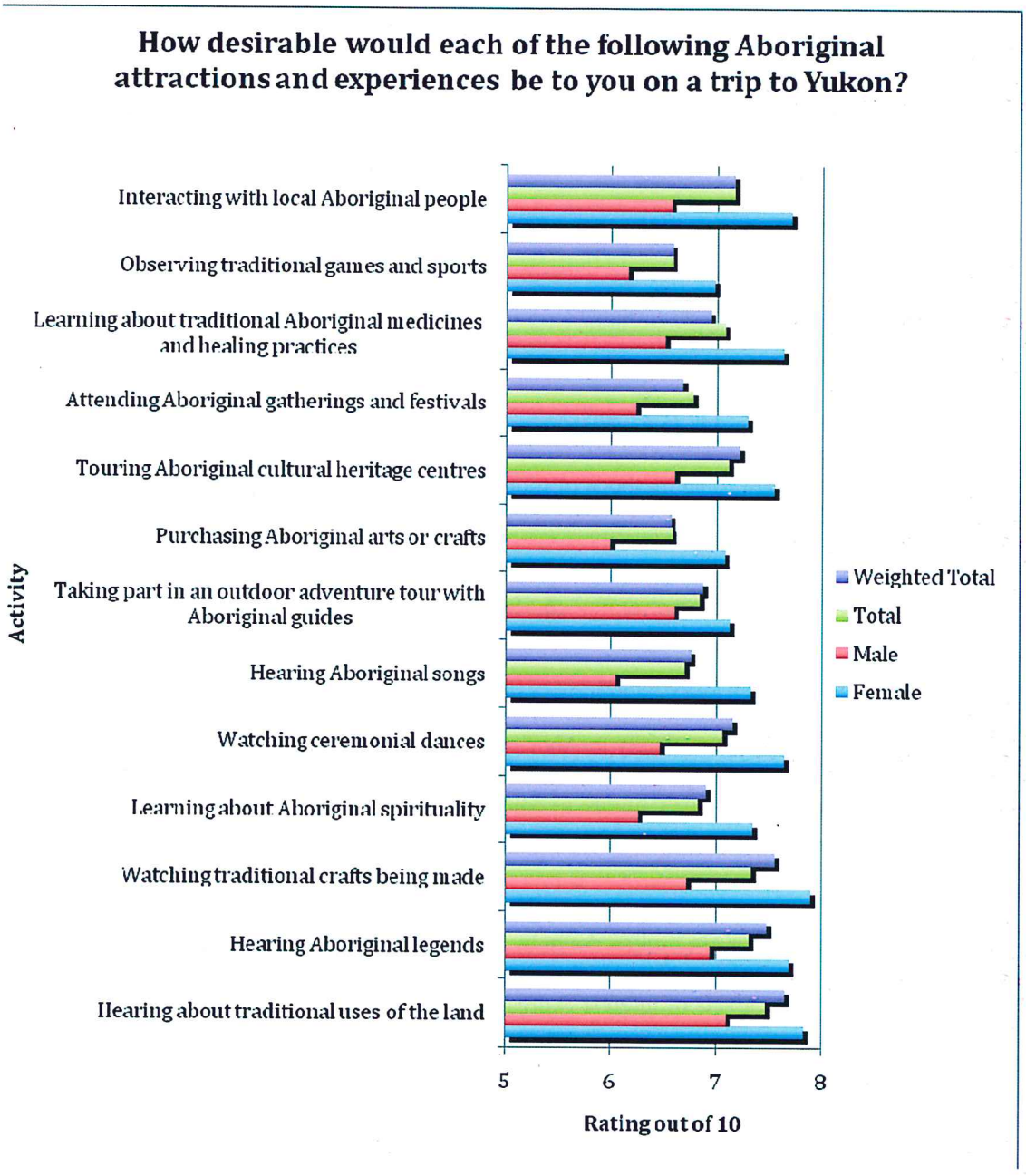
The five lowest-rated experiences were as follows:

- "Going white-water rafting" (4.67/10)
- "Watching can-can dancing in a historical show" (5.27/10)
- "Learning to pan for gold" (5.51/10)
- "Participating in traditional methods of food gathering (e.g. hunting, trapping and fishing)" (6.40/10)
- "Purchasing Aboriginal arts or crafts" (6.58/10)

Of these five low-rated experiences, three (gold panning, can-can dancing and rafting) were control categories not related specifically to Aboriginal culture. Thus respondents tended to rate Aboriginal cultural experiences fairly highly as compared to other typical Yukon vacation experiences.

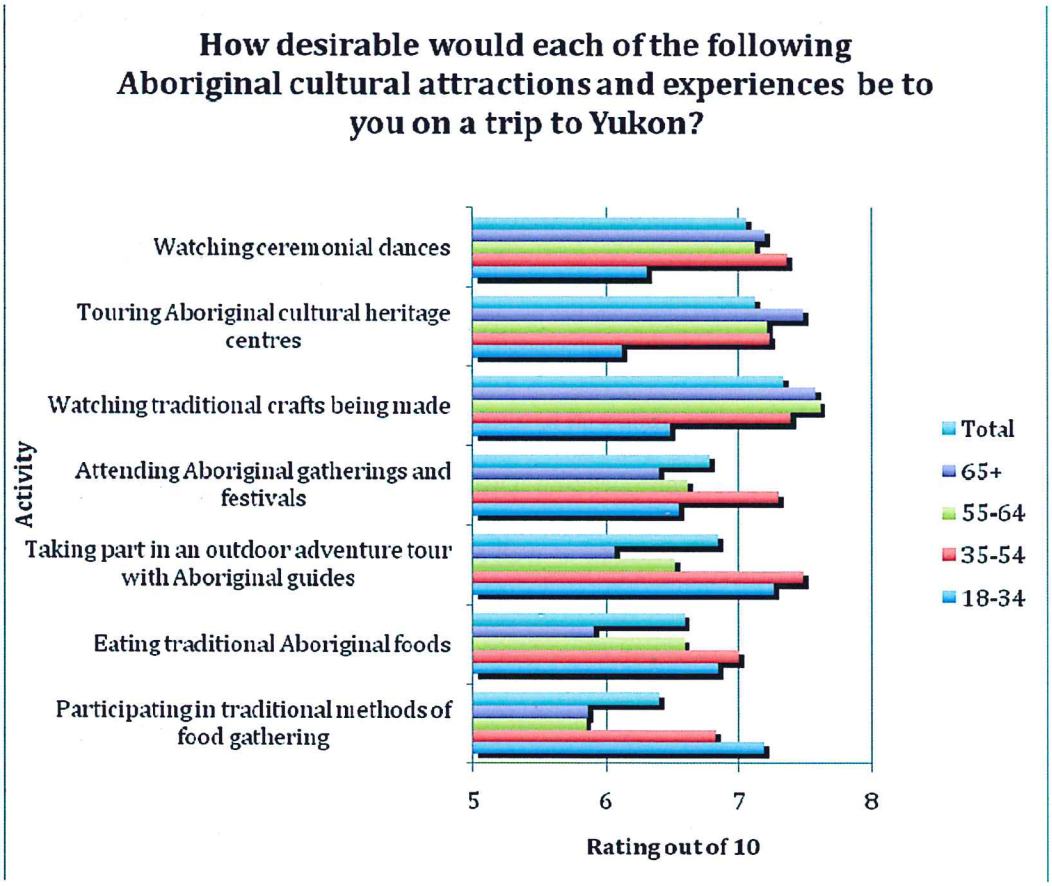
When the mean ratings are broken down by demographic variables, however, considerable variation can be seen in the levels of interest expressed in different types of experiences, as well as in overall levels of interest. Female respondents gave significantly higher ratings to almost all Aboriginal cultural experiences than did males.[2]

[2] Note that where 10-point scale questions are represented in charts, the range represented is between 5 and 8, as this is where all mean responses fell. The decision to show the axis in this manner was made to assist in clarity of viewing: small but significant differences between demographic categories can be difficult to see on a 10-point scale.



Age was also a factor in determining levels of interest for specific experiences. As expected, younger travelers (both those aged 18-34 and those aged 35-54) expressed greater interest in more active experiences than did older travelers. These included "taking part in an outdoor adventure tour with Aboriginal guides," and "participating in traditional methods of food gathering (e.g. hunting, trapping and fishing)." Younger travelers also expressed greater interest in "eating traditional

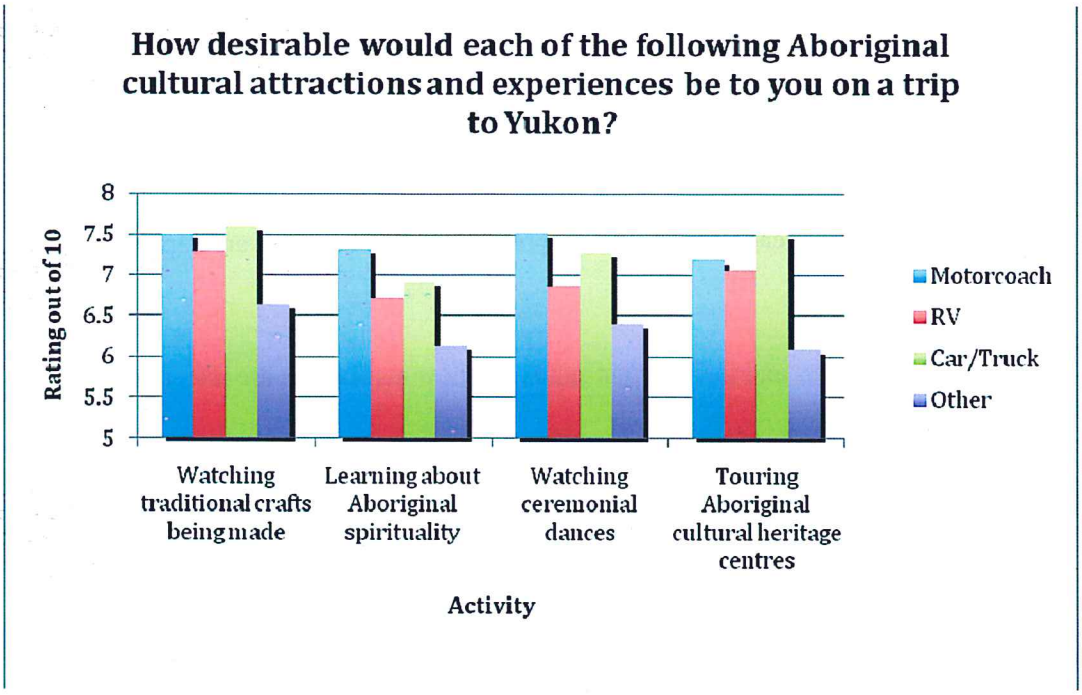
Aboriginal foods." Older travelers (those aged 65 and over, and those aged 55-64), on the other hand, expressed more interest in what might be termed "passive learning experiences," such as "touring Aboriginal cultural heritage centres," "watching ceremonial dances" and "watching traditional crafts being made (e.g. carving, making moccasins)." Younger middle-aged travelers (those from 35-54) also expressed more desire for "attending Aboriginal gatherings and festivals" than any other age category.



In general, travelers from different countries did not differ significantly in regards to the interest they expressed in particular experiences. "Attending Aboriginal gatherings and festivals," however, was rated more highly by German travelers than by others, while "Seeing the way Aboriginals used to live" was rated less highly by Canadians than by all other travelers. This lower level of interest in the past among domestic travelers may reflect the fact that most Canadians

already possess some knowledge of First Nations history. On the other hand, it may also reflect a greater awareness among Canadians of contemporary Aboriginal culture and politics, and perhaps a sense that tourism based upon current realities is more sensitive and appropriate than that based on frequently outdated notions of "traditional" life.

Only one significant difference was found between independent and organized group travelers in regards to particular products: independent travelers appear to be more adventurous eaters, rating "eating traditional Aboriginal foods" more highly than did group travelers. While variation existed in regards to other activities, statistical significance was not attained. However, several differences were apparent between travelers using different modes of transportation. Motorcoach travelers rated their interest in "watching ceremonial dances" and "learning about Aboriginal spirituality" slightly more highly than did all other groups. "Touring Aboriginal cultural heritage centres" and "watching traditional crafts being made," on the other hand, were most popular among car/truck travelers, followed by motorcoach and RV travelers, but less so among travelers using other methods of transportation. Differences were fairly small, however, and there was a good deal of variation within groups as well as between them.



Open-Ended Responses

Respondents were also asked if there were any Aboriginal cultural experiences that were not on the list that they would be particularly interested in. While a few of the answers were repetitions of products that had, in fact, been listed (e.g. dancing), others were more informative. Several respondents mentioned items related to the production or preparation of food or other uses of natural products:

- "production of meals"
- "dances and food crafts (moose)"
- "food prep"
- "edible plant identification"
- "medicine / food / animal products (leather etc.) preservation methods"

Another theme running through the open-ended answers was an interest in contemporary issues and lifeways. Several respondents indicated that they would like to know more about

ongoing cultural traditions, while others indicated interest in historical events and their effects on contemporary culture:

- "seeing how they live today"
- "structure of society / lineage determination, property sense / land stewardship, effects of contact"
- "understand land claims and their current status and how aboriginals are integrated in the politics of the province"
- "viewing of a First Nations community / residential area"

Other experiences mentioned included sweat lodges and learning about First Nations educational systems. Most respondents, however, did not in fact suggest any experiences beyond those listed (only 30 of 428 respondents answered this question).

CHARACTERISTICS OF EXPERIENCES SOUGHT

Preferred Number of Experiences

Many respondents indicated that they would be interested in participating in multiple experiences relating to Aboriginal culture while on their current trip. In some cases, respondents gave unrealistic estimates of the number of such experiences that they would participate in, perhaps interpreting the question as relating more to "on an ideal trip" than "on your current trip." For instance, of the 18 respondents who indicated that they were spending just one day in Yukon, four indicated that they would like to participate in 2-3 Aboriginal experiences, while another stated that he or she would be interested in 4-6.

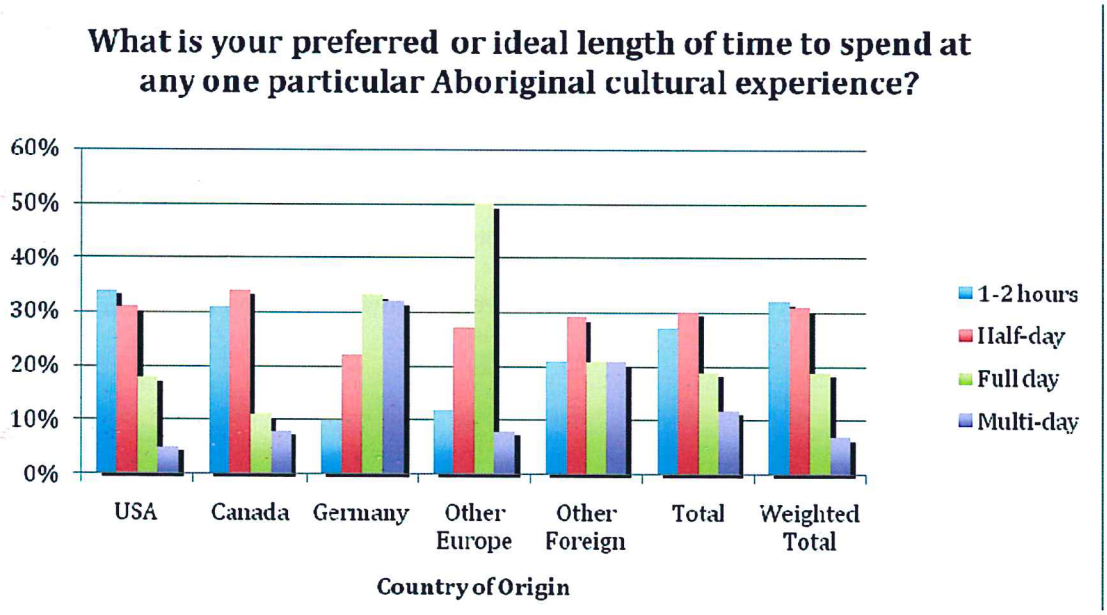
Overall, 44 percent of respondents indicated that they would be interested in participating in 2-3 Aboriginal experiences on their current trip. A further 17 percent indicated that they would be interested in 4-6 experiences, while six percent chose 7 or more. Just four percent indicated that

they would not be interested in any Aboriginal experiences, and 11 percent indicated that they would be interested in just one. However, 17 percent (nearly one in five) respondents did not know or chose not to respond to this question.

No significant differences were found among different demographics. However, respondents did differ in their responses to this question in accordance with the length of their stay in Yukon. As might be expected, those staying longer were, in general, more likely to express interest in participating in a greater number of experiences.

Preferred Length of Experiences

Overall, the most preferred length for any one Aboriginal cultural experience was a half-day, followed closely by 1-2 hours, then a full day. Only 12 percent of respondents indicated that two or more days would be their preferred length for any particular experience. A further 12 percent did not know or chose not to answer.



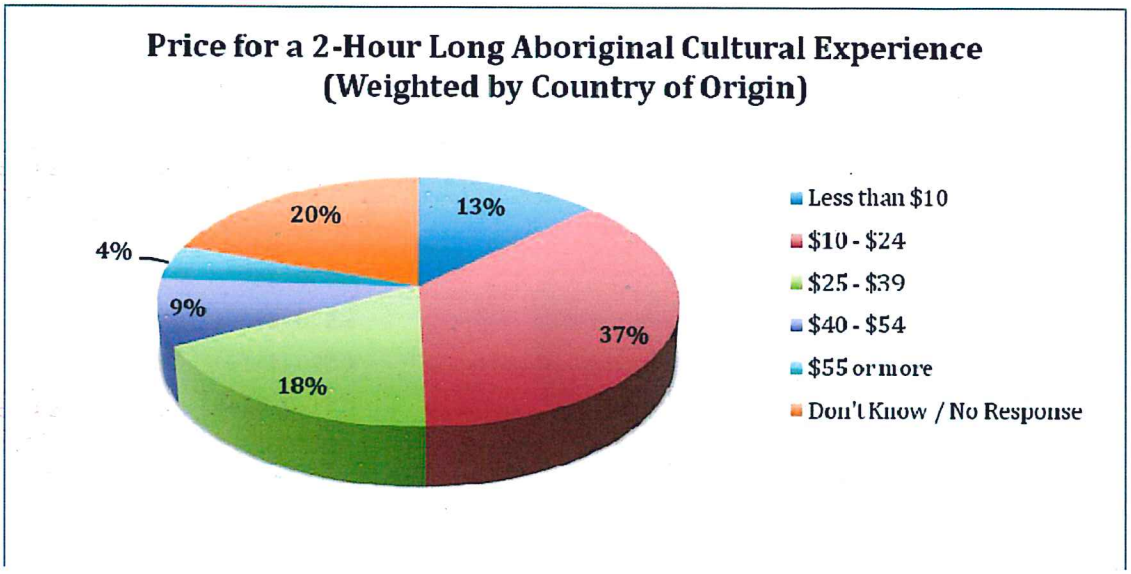
Travelers from outside North America tended to prefer longer experiences. German travelers, in particular, were the most interested in multi-day experiences, while American and Canadian travelers preferred experiences of 1-2 hours or a half-day in length.

As expected, those with greater interest in Aboriginal cultural experiences were also much more interested in longer trips. However, shorter experiences (1-2 hours or a half-day) were still more popular, even among those who stated that they were "very interested," than full-day or multi-day experiences.

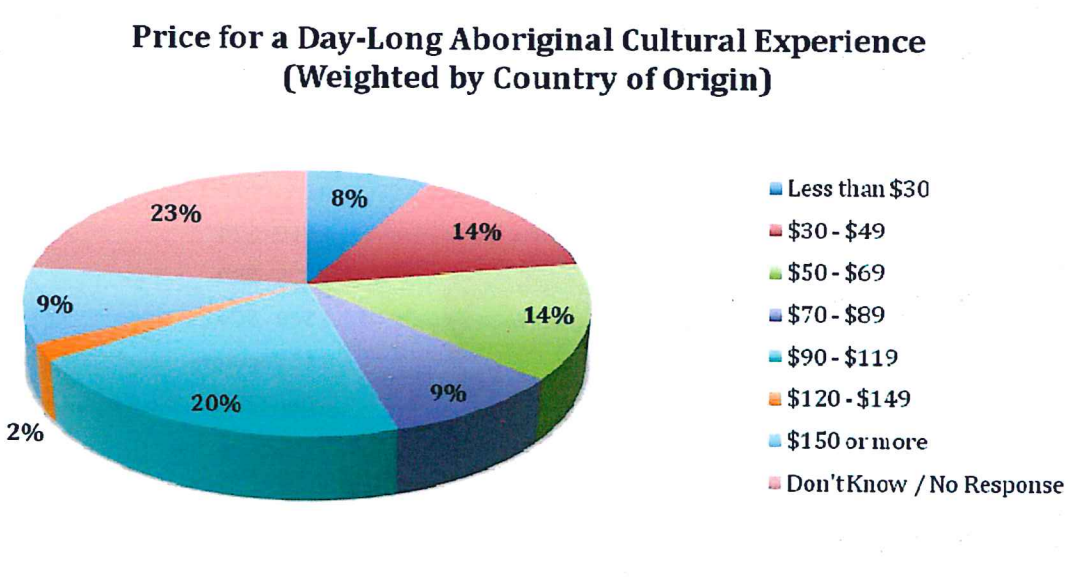
Preferred Price Ranges

The price that different travelers were willing to pay for an Aboriginal cultural experience also varied greatly. The most popular price category for a 2-hour long experience (examples given were: "participating in a craft workshop or watching a traditional dance performance") was $10 - $24, with over 40 percent of respondents choosing a price in that range. The second most popular price range was between $25 and $39, then $40 to $54. Almost one in ten respondents were willing to pay less than $10, while just over one in twenty would be willing to pay more than $54. Many respondents were also unsure or did not respond.

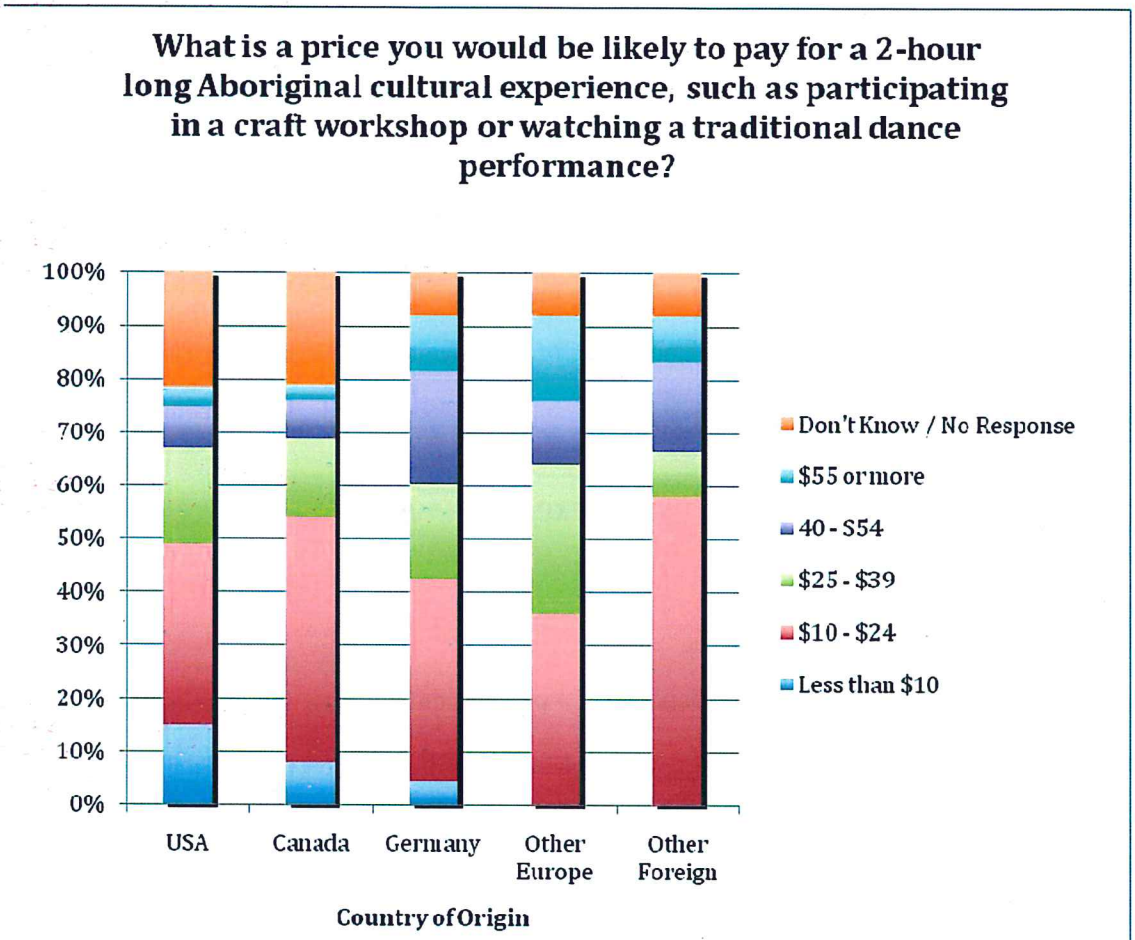
When weighted to reflect visitors' country of origin, the numbers look very similar. The most popular price category remains $10 - $24; however, the lowest category (less than $10) grows slightly in popularity.



For a day-long experience with meals included (more than four hours in length; examples given were a canoeing expedition with an Aboriginal guide or accompanying an Aboriginal person on their trap lines or to their fish camp), there was an even wider spread in the prices respondents thought most appropriate. When weighted by country of origin, the most frequently chosen price category was $90 - $119 (one in five respondents). The next most popular price categories were $30 - $49 and $50 - $69, with 14 percent of respondents lying within each. Another eight percent of respondents were willing to pay less than $30. Again, over one fifth of respondents either did not respond or were unsure.



Germans and other Europeans were willing to pay significantly more for both 2-hour and day-long experiences than North Americans, with foreign, non-European travelers falling somewhere in the middle. Canadian and American travelers were also significantly more likely to choose "Don't Know" or decline a response to this question. Organized group travelers also indicated a willingness to pay slightly higher prices, but were also more likely to decline a response or answer "Don't Know."



Age was also a factor in the price that respondents felt to be most appropriate. Significant differences were found in regards to the prices for a day-long experience, with younger people (aged 18 – 34) tending to choose lower or mid-range prices, elderly respondents (over age 65) choosing generally lower prices, and middle-aged respondents (those aged 35 – 64) willing to pay the most. This pattern is also found in the prices for a 2-hour experience, but did not attain significance in that regard.

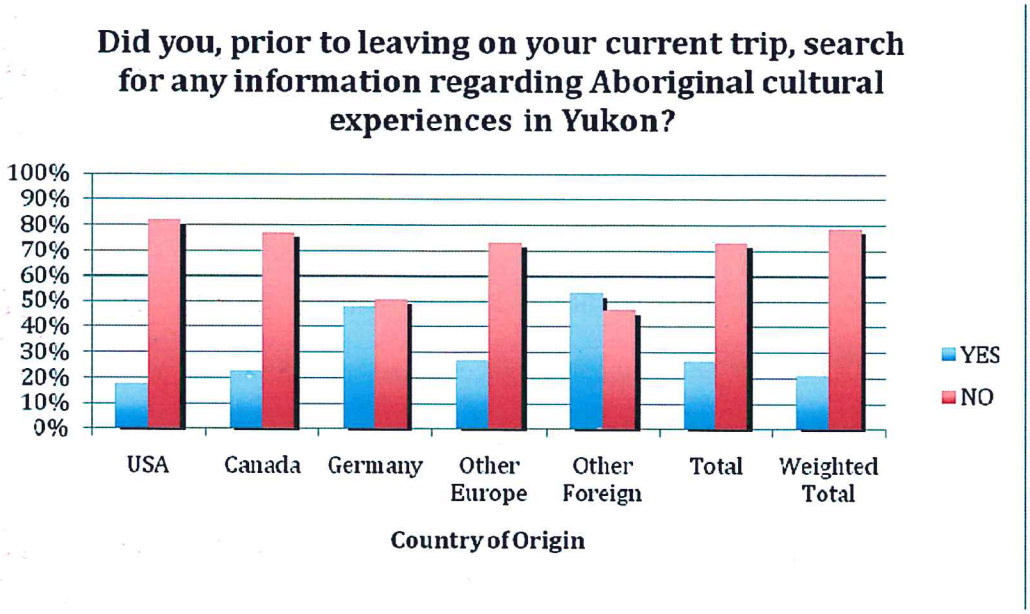
This question appeared to be difficult for respondents to answer. Many would base their preferred price on the type of experience offered and were unwilling to name a blanket price. An additional issue lay in the structuring of the answer categories. Respondents were asked to write in a price, and these prices were then coded into categories during data entry. It should be noted that

most of the answers fell at the lower end of the price category into which they were placed – i.e. many respondents answered "$10," which would be placed into the category "$10 - $24." Another popular answer was "$25," which again fell into the category "$25 - $39." Thus prices that respondents were willing to pay may have been slightly overestimated. In addition, when respondents answered "Don't Know" to this question, the experience of the interviewers was that this sometimes indicated that they would not be willing to pay at all for this type of experience, but felt that putting "$0" would be rude.

INFORMATION SEEKING BEHAVIOUR

Pre-Trip Information Seeking

Overall, the vast majority of respondents (73 percent) did not seek any information on Aboriginal cultural tourism experiences in Yukon prior to leaving on their trip. This did not vary greatly by demographics, except in regards to country of origin. The travelers most likely to have sought information on Aboriginal tourism prior to leaving were visitors from outside Europe and North America, and Germans, roughly half of whom had sought information. Other European travelers were less likely to have searched for this material, as were Canadians. Americans, however, were the least likely to have searched for pre-trip information. When weighted by country of origin, just over one in five travelers to Yukon search for information on Aboriginal cultural experiences prior to departure.



RV travelers were also significantly more likely to have searched for information on Aboriginal cultural experiences prior to their trip than were those traveling by car or truck, motorcoach, or other means. These travelers, however, probably sought more information on tourism opportunities in Yukon in general than did others, due to the long average duration of trips by RVers (DataPath Systems, 2007) as compared to those traveling by car/truck or other means.

As might be expected, those travelers who placed greater importance on Aboriginal culture as a factor in their travel plans were also more likely to have searched for relevant information prior to their trip. Of the travelers who indicated that Aboriginal culture was either very or somewhat important in their choice to visit Yukon, almost half had searched for information on Aboriginal cultural tourism experiences prior to leaving on their trip. Of those who indicated that it was not very or not at all important in their decision to visit Yukon, only eight percent had searched for information on Aboriginal tourism opportunities.

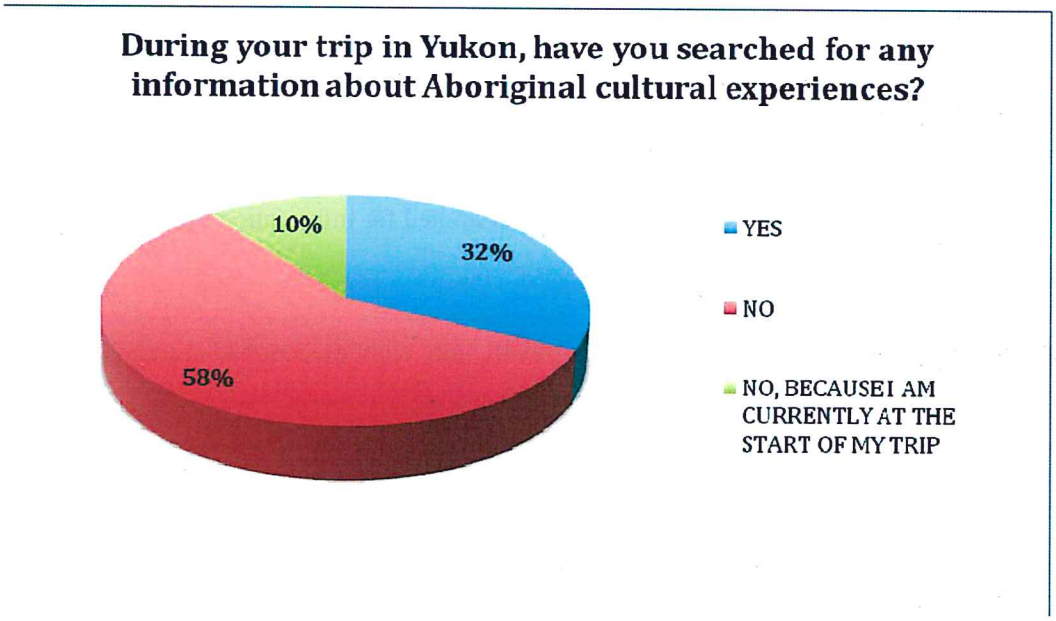
Those who had participated on previous occasions in Aboriginal cultural experiences were also more likely to have searched for information. Of those who had participated in such

experiences, 35 percent did seek information prior to coming to Yukon, while only 15 percent of those who had not participated previously searched for such materials.

The most common source of pre-trip information was the internet, with 54 of the 120 respondents who searched for information indicating that they had used the internet to do so. Only two respondents specifically mentioned the official website of Tourism Yukon (www.travelyukon.com), however. Other common sources of pre-trip information included travel guides or guidebooks, books and personal contacts, as well as Visitor Information Centres and pamphlets or brochures. A few respondents had attended lectures or viewed film or television documentaries, and several also mentioned the Milepost.

Information Seeking During Trips in Yukon

A slightly greater number of travelers indicated that they had searched for information on Aboriginal tourism opportunities during their trip in Yukon. Overall, 32 percent indicated that they had sought some information while here, while another 10 percent said that they had not, but only because they were at the start of their trip.



However, many travelers appeared to misinterpret this question, judging by the answers to the question that followed it regarding the sources of information that they had consulted. It appears that many respondents gave information on actual Aboriginal cultural tourism experiences they had participated in, rather than on methods they had used to find out about such experiences. Nonetheless, the answers do show that a significant number of travelers (at least one third) are exposed to some information on Aboriginal tourism while in Yukon, whether in the form of brochures or books, VIC staff, or actual visits to sites and interpretive centres.

The most frequently named source of information consulted during respondents' trips in Yukon was Visitor Information Centres. Thirty-three respondents also reported obtaining information from local cultural attractions, including museums, interpretive centres, festivals, and roadside exhibits. Some of these respondents had misunderstood the question and were simply listing Aboriginal cultural experiences they had attended, but some appeared to be indicating that they gathered information on other opportunities while there. Other popular sources of information included personal contacts or word of mouth (28), pamphlets or brochures (15) and travel guides or guidebooks (10). Again, several people mentioned the Milepost, and a handful also consulted the internet during their trip.

BENEFITS SOUGHT IN CULTURAL TOURISM

Quantitative Findings

As noted in the literature review, a great deal of recent research on cultural tourism suggests that many travelers visit cultural attractions for very different reasons from one another, which may contribute to the types of experiences they choose and the characteristics they value in them. Therefore, respondents were asked about the benefits they hoped to obtain through participation in cultural tourism experiences. The first question on this topic was open-ended, and asked respondents to name the most important benefit they would hope to take away from a cultural

experience. Following this, respondents were then provided with a short list of benefits and asked to rate the importance of these benefits to them. Some interesting differences emerged around the benefits sought by different demographics.

Overall, the benefit respondents rated most highly was "to learn about Yukon's history," followed closely by "to learn about another culture." Respondents also rated "to see or do something new or different" and "to gain new insights or enrich your perspective on life" highly. The least highly rated benefit was "to have a meaningful spiritual experience." Only slightly higher rated were: "to forget everyday demands or frustrations" and "to have stories to tell back home."

However, when split up by demographic factors, important differences could be noted. Travelers from North America (USA and Canada) were significantly more likely to rate "to have fun, to be entertained" more highly than were travelers from all other countries. They were also significantly more likely to rate "to have stories to tell back home" as a benefit of greater importance.

Those traveling in an organized group were also significantly more likely to rate these same two benefits more highly than did independent travelers. In addition, although levels did not attain statistical significance, there was a tendency for group travelers to rate "to relax and relieve stress" and "to forget everyday demands or frustrations" more highly than independent travelers.

It should be noted that independent travelers to Yukon have very different experiences from those traveling in organized groups. Those who tend to usually travel independently, therefore, are likely to have quite different priorities in travel, and to approach tourism experiences in a different manner. Many of the "organized group" respondents in our survey were with bus tours such as Holland America. These tours tend to cover a lot of ground in a short period of time, and provide participants with scheduled activities and stops. Little independent planning and research is needed, as choices of activity are made by the tour company. In-depth experiences are generally not

incorporated into the itinerary, with shorter stops and tightly packaged components being emphasized. Independent travelers, while varying widely in the time they have to spend, are usually freer to choose their own destinations and activities, and to determine the time they spend at each. They also have a greater use for independent information sources. These differences may be reflected in the divergent benefits sought by independent and organized group travelers: group travelers, in particular, may be more interested in relaxation, escape and diversion than those traveling independently.

Differences were also noted between those using different means of transportation. Motorcoach and RV travelers were more likely to rate "to learn about Yukon's history" highly as opposed to car/truck travelers and those using other means of transportation. Interestingly, these same two groups were also more likely to rate "having a meaningful spiritual experience" highly.

Gender, however, was the most important demographic factor in the importance attached to different benefits. Overall, women tended to rate all of the listed benefits as more important to them. Of particular significance were the following benefits, all of which were rated by female respondents as being more important:

- "to learn about another culture"
- "to see or do something new and different"
- "to learn about Yukon's history"
- "to gain new insights or enrich your perspective on life"
- "to have fun, to be entertained"
- "to have stories to tell back home"
- "to have a meaningful spiritual experience"

Older travelers (65+) and younger middle-aged travelers (35-54) also rated "to have a meaningful spiritual experience" more highly than did younger travelers. (18-34) or older middle-aged travelers (55-64).

Travelers also perceived the benefits they might obtain differently according to the level of interest and importance they attached to Aboriginal cultural experiences. Those travelers who rated themselves as very or somewhat interested in Aboriginal cultural tourism experiences were more likely to rate all of the listed benefits as being more important to them. Travelers who stated that Aboriginal culture was very or somewhat important in their decision to visit Yukon were also significantly more likely to rate the potential benefits as more important to them – with the exception of "to relax and relieve stress" and "to forget everyday demands or frustrations." This suggests that those tourists who are interested in Aboriginal culture are less likely to be seeking primarily relaxation or diversion, and more likely to be looking for enriching experiences where learning is a component.

Open-Ended Responses

When given the opportunity to list the most important benefit they would hope to take away from a cultural experience, most respondents gave answers that revolved around the closely connected themes of "learning," "understanding," "appreciation," or "knowledge." Often these answers were quite vague:

- "an understanding of a different culture"
- "a better understanding of native peoples"
- "learning about other cultures"

Some respondents, however, were more specific in regards to what it was they wished to better learn or understand. While some were interested primarily in traditional ways and lifestyles, a significant number of respondents expressed greater interest in learning about present-day

circumstances and developments in Aboriginal culture and political life. Others specifically stated that they would like to learn about both historical and contemporary cultural practices and happenings, clearly viewing cultural and political changes as interconnected.

LEARNING ABOUT TRADITIONAL WAYS OF LIFE

- "better understanding of the past"
- "better understanding of traditional ways of life"
- "how it was before and how they used to live"

UNDERSTANDING CONTEMPORARY EVENTS

- "how Aboriginals interact with resource development companies"
- "better understanding of how the Canadian government is giving back land and political power to its first inhabitants"
- "greater knowledge and understanding of First Nations' concerns in 21st century"

BLENDING PAST AND PRESENT

- "appreciation for current cultural practices as well as historical"
- "understanding traditional way of life and how it has changed over the last 100-200 years"
- "a more complete and in depth knowledge and understanding of Aboriginal culture – past and present"
- "insight into how things have changed for the natives in modern times"

A number of respondents also discussed the connections between Aboriginal cultures and the natural environments they originated in. As found in the recent report for the CTC (Insignia Research, 2007), connectedness to land and landscape was a recurrent theme:

- "becoming more intense contact to the landscape, feeling less separated"
- "experience the closeness / connectedness of the natives to nature"

- "how First Nations respect the land"
- "learning about sustainable interactions with the environment"

A small but significant number of participants also expressed interest in having a spiritual or religious experience:

- "connection with creator"
- "enrich my spirit / soul"
- "experiencing something different and maybe having a spiritual experience"
- "spiritual growth"

A few also noted the possible benefits of cultural tourism to the Aboriginal communities themselves:

- "education and passing on info to others; trying to help remove some of the sometimes negative aspect Aboriginals get in Canada"
- "help Aboriginal people with providing work"
- "respect through knowledge"

Finally, a number of respondents were interested in learning practical skills, often around crafts, food production, or wilderness survival techniques:

- "to survive in cold temperature"
- "adventure in the wilderness, fishing, cooking"
- "how to survive in the wilderness"

CONCLUSIONS

1. General interest in Aboriginal cultural tourism experiences in Yukon is high.

The majority of respondents state that they are either somewhat or very interested in Aboriginal cultural experiences on their current trip. Most respondents have also previously participated in an Aboriginal cultural experience, either here in Yukon or elsewhere in the world.

In addition, when given a list of Aboriginal cultural experiences compared with non-Aboriginal but Yukon-themed experiences, respondents generally rated Aboriginal cultural experiences more highly than the non-Aboriginal experiences.

2. Foreign travelers attach greater importance to Aboriginal culture.

Although levels did not reach statistical significance, foreign travelers tended to express greater interest in Aboriginal cultural experiences overall than did North American travelers. They were significantly more likely to state that Aboriginal culture was very or somewhat important in their decision to visit Yukon. Foreign travelers were also more likely to have searched for information on Aboriginal cultural tourism opportunities prior to their arrival in Yukon, were willing to pay higher prices for such activities, and were more interested in multi-day experiences.

3. Female travelers show greater interest in Aboriginal tourism experiences.

Female respondents were more likely than males to say that they were either very or somewhat interested in Aboriginal cultural tourism experiences in general. They tended, on average, to rate their interest in most Aboriginal cultural experiences significantly more highly than did male respondents, and also attached greater importance to many of the suggested benefits of cultural tourism than did male respondents.

4. Aboriginal culture is not a primary motivating factor for most travelers' decisions to visit Yukon, but may be a secondary draw.

Only one in ten respondents rated Aboriginal culture as a "very important" factor in their decision to visit Yukon. However, four in ten rated it as a "somewhat important" factor. Other studies have found that Aboriginal cultural tourism products are unlikely to be the primary motivating factor for travel to particular locations, but more frequently serve as a value-added (Ryan and Huyton, 2000; 2002), a contention that appears to be supported by our results.

5. Those who have participated in Aboriginal cultural experiences before are likely to do so again.

Those who indicated that they had previously participated in an Aboriginal cultural experience, either in Yukon or elsewhere, rated their interest in Aboriginal cultural experiences more highly than those who had not. They were also more likely to have sought out information on Aboriginal culture prior to leaving on their trip. These travelers are more likely to be independent rather than organized group travelers, and to come from places other than the United States.

6. Pre-trip information seeking is minimal, especially among North American travelers.

The majority of travelers (even among those who indicated Aboriginal culture was important in their choice to visit Yukon) do not search for information on Aboriginal cultural opportunities prior to leaving on their trip. In particular, American and Canadian travelers are significantly less likely to search for information than foreign travelers from outside North America. Insignia Research's report for the CTC (2007), also found that many travelers do not plan or book Aboriginal experiences prior to leaving on their trip. The authors suggest that many travelers may have concerns about the authenticity or quality of cultural tourism products, and therefore choose to wait until they reach their destination before making any commitments. This

may also apply to information-seeking: many travelers may choose to wait until they arrive if they feel that the information available at a distance is incomplete or hard to find.

7. Information seeking during trips relies heavily on local knowledge and word-of-mouth.

More travelers search for information on Aboriginal cultural experiences while in Yukon than prior to trips, but a majority still do not actively search for this type of information. The most frequent sources of information during trips are Visitor Information Centres, followed by local cultural attractions (e.g. museums or interpretive centres, art galleries and shops) and personal acquaintances or word of mouth. Local contacts and promotional efforts therefore can have a major impact on the specific experiences of which travelers are made aware.

8. Different travelers will pay very different prices for Aboriginal cultural experiences.

Travelers show a wide variation in the prices they are willing to pay, for both 2-hour and day-long experiences. Middle-aged travelers (those aged 35 – 64) are generally willing to pay more than are young (18-34 year-old) travelers and those over 65. In many cases, this is likely due to budgetary limits rather than differences in valuation of the products offered: younger travelers and older travelers will generally have lower incomes than middle-aged travelers.

Those from outside North America are also willing to pay significantly more than Canadian and American travelers. This may reflect to some degree the amount of money such travelers have already put into their trip. Having paid substantial prices for transportation to their destination, foreign travelers are also likely to have budgeted larger amounts for activities and experiences upon their arrival. Unlike RV travelers from the US, however (who may also have spent significant amounts on transportation), their trips are unlikely to last longer than a few weeks, meaning that emphasis may be on perceived quality of an experience rather than on quantity and affordability. In

other words, many foreign travelers are making a relatively short "once-in-a-lifetime" trip and may be willing to pay top dollar to see that it meets their expectations.

9. Most travelers interested in Aboriginal culture are primarily looking for a learning-centred experience.

The most highly rated benefits of cultural tourism were focused around learning: "to learn about Yukon's history," followed closely by "to learn about another culture." Respondents also rated "to see or do something new or different" and "to gain new insights or enrich your perspective on life" highly. Open-ended responses also revolved around themes of "learning," "understanding" and "knowledge." Escape-oriented benefits such as "to forget everyday demands or frustrations" and "to have fun, to be entertained," were rated significantly less highly, and were not encountered in the open-ended responses. The most popular Aboriginal cultural experiences also frequently involved a learning component.

10. There is interest in both contemporary and historical events and culture

Respondents gave high ratings to experiences related to "traditional" cultural ways. "Hearing about traditional uses of the land," "seeing the way Aboriginals used to live," and "watching traditional crafts being made (e.g. carving, making moccasins)" were the three top-rated experiences. However, open-ended responses, both in regards to the specific experiences sought and the most important benefits to be obtained from cultural tourism, often indicated interest in both historical and current political events and realities, and changes in Aboriginal culture and lifeways.

11. Aboriginal people are viewed as being closely connected with "nature" and possessing unique knowledge of the natural environment

Responses to the open-ended question, "What is the most important benefit you would hope to take away from a cultural experience?" often related to knowledge of the natural environment.

Travelers sought, for example, "interaction with those who understand the north and the land." Wilderness survival techniques were also frequently mentioned.

Many other researchers have also found that travelers frequently associate Aboriginal peoples with the landscapes they inhabit, and seek to understand one through the other (Ryan and Huyton, 2000). This has been specifically noted in relation to First Nations people in Canada (Insignia Research, 2007), who are often perceived as providing unique perspectives on the local environment.

12. Older travelers are often more interested in passive learning experiences, while younger travelers desire more active adventures.

Although travelers of all ages appear to desire experiences with a learning component, younger travelers may prefer more hands-on experiences with a larger participatory element or more active focus. Older travelers, however, who make up the majority of visitors to Yukon, tend to prefer more passive activities and experiences. For example, younger travelers (both those aged 18-34 and those aged 35-54) expressed greater interest in "taking part in an outdoor adventure tour with Aboriginal guides," and "participating in traditional methods of food gathering (e.g. hunting, trapping and fishing)." Older travelers (those aged 65 and over, and those aged 55-64), on the other hand, expressed more interest in "touring Aboriginal cultural heritage centres," "watching ceremonial dances" and "watching traditional crafts being made (e.g. carving, making moccasins)." This echoes the results of Moscardo and Pearce's (1999) research at Tjapukai Aboriginal Park in Australia, which also found that those tourists interested in more passive activities tended to be older on average than those with greater desire for participation and direct contact.

13. Independent travelers and those in organized groups seek different benefits from cultural tourism

Although few significant differences were found in the ratings given to particular Aboriginal cultural experiences by independent travelers as opposed to those in organized groups, differences elsewhere suggest that these types of travelers approach their trips differently. Those traveling in an organized group were significantly more likely to rate the benefits "to have fun, to be entertained" and "to have stories to tell back home" more highly than independent travelers. Organized group travelers were less likely to have participated previously in an Aboriginal cultural experience, and were less likely to be willing to name a price for a particular experience, suggesting a lower level of engagement with this type of experience. This does not mean that such travelers are not interested in Aboriginal cultural experiences, but they may be less likely to seek them out or put much effort into planning them.

APPENDIX A: LITERATURE REVIEW

INTRODUCTION

A thorough review of the literature around cultural tourism was conducted prior to the development of the Yukon Aboriginal Tourism Survey, in order to determine priorities for research and areas where sufficient data were already available. Relevant journal articles and government documents from Canadian and international contexts were reviewed, and a number of major research themes were identified and explored in greater detail. These themes included the nature and intensity of overall demand for aboriginal tourism experiences, the uncertain relationship between expressed interest and participation in cultural tourism activities, the segmentation of visitors to cultural experiences (both through demographic data and through more subjective measures), the concept of "authenticity," and the relationship between nature-based and culture-based tourism attractions. Finally, specific issues relating to Aboriginal tourism in the Canadian context were investigated.

DEMAND FOR ABORIGINAL CULTURAL TOURISM

Many industry and government-sponsored studies, both from Canadian contexts and worldwide, offer high estimates of demand for Aboriginal cultural tourism. The executive summary for Aboriginal Tourism Team Canada's document, "Demand for Aboriginal Tourism Products in the Canadian and American Markets," states: "there is tremendous untapped potential for the cultural and outdoor experiences Canada's Aboriginal communities can offer" (2001, p. 1). The same document also tells us that "millions of Americans and Canadians fall within the potential markets for Aboriginal Communities" (p. 2). Similarly, a multi-country study of interest in Aboriginal tourism prepared for the Canadian Tourism Commission (TNS Canadian Facts, 2007) found that "significant interest is expressed in long-haul trips to participate in aboriginal activities

in all of the markets under study" (p. 7). These markets included the US, the UK, France, Germany, Mexico, Japan, South Korea, China and Australia. Between 12 and 26 percent of all travelers/intenders in each market stated that they would be "extremely interested" in taking a trip that included participation in aboriginal activities; large numbers of respondents also rated themselves "very interested" (TNS Canadian Facts, 2007, p. 4).

A separate report for the Canadian Tourism Commission also reported data from the European Segmentation Survey, which found similar interest levels, with 41 percent of UK long haul travelers, 67 percent of German long haul travelers and 75 percent of French long-haul travelers stating that Aboriginal cultural tourism would be "very important" or "somewhat important" on a trip of three or more nights with one or more nights in paid accommodation (Insignia Research, 2007, p. 33). The same study, however, found that only one percent or less of French, German and British travelers rated Aboriginal culture as the main reason for traveling, and only four percent of British travelers, 13 percent of German travelers and 19 percent of French travelers stated that it was a reason for traveling at all (p. 34).

Participation rates were found to be fairly high globally, with 43 percent of French travelers on long haul trips participating in an Aboriginal cultural activity, as did 32 percent of German and 18 percent of British travelers. In Canada, numbers were slightly lower for French and German travelers (41 percent and 26 percent, respectively) participating in Aboriginal cultural experiences, and slightly higher for British travelers (19 percent) (Insignia Research, 2007).

If taken at face value, these findings do appear to indicate that demand for Aboriginal tourism products in Canada is strong among all key markets, with a large growth potential reliant upon increased awareness of Canada as a destination for Aboriginal cultural tourism. However, a number of articles from Oceania (Ryan and Huyton, 2000; 2002; Ryan and Higgins, 2006) have questioned the accuracy of demand estimates presented in such documents. In particular, Ryan and

Huyton (2000) suggest that reports may overestimate demand through failing to adequately compare Aboriginal tourism products with other products available in the area. As they note, "if visitors are indicating interest, but the subject of the interest is comparatively unimportant to respondents, then actual visitation may be below expectation" (p. 17). In their analysis of data collected at the town of Katherine in Australia's Northern Territory, the authors compared responses to Aboriginal tourism products with non-Aboriginal products in the same region, and found that the highest-rated Aboriginal product (viewing rock art) was ranked 15th on the list, though interest in Aboriginal tourism in general was expressed by 40 percent of the sample (Ryan and Huyton, 2000). The same authors, in a later (2002) article, claim that only a small subset of tourists actually possess high levels of interest in Aboriginal tourism (mainly, young, female travelers from the UK, North America and Germanic countries). The medium levels of interest expressed by a larger subsample are thought by Ryan and Huyton to have much to do with the association for travelers of Aboriginal culture with landscape and environment, of which complex, they believe, the landscape is the more essential aspect (2002, p. 642). A similar conclusion is reached by Ryan and Higgins (2006) in their study of visitors to the Maori Arts and Crafts Institute in New Zealand. This facility is located at the site of a volcanic geyser, and interpretive activities are centred around both natural and cultural features. Ryan and Higgins found that while both aspects drove visitors' interest, the geysers were generally rated higher than the cultural aspects. They suggest, further, that while many visitors expressed high levels of interest in Maori cultural activities in general, their actions on trips suggest that Maori cultural exploration is not a high priority for many travelers, as evidenced by the minimal searching conducted for experiences, the high frequency of trips to only a few easily accessible and well-known attractions, and the oft-cited reason of "no more time" as a reason why they did not allot more time to Maori cultural activities. It is suggested that visitors feel that once they have done one Maori cultural experiences they have "crossed it off their list." Thus Aboriginal cultural activities may in some cases be felt to be almost

obligatory items for some destinations, on a mental checklist of essential "things to write home about." While this is positive in that people are in fact participating in these experiences, we are left with a note of caution on the risks of interpreting either presence at a cultural attraction or high stated level of interest as indicative of strong and growing demand.

CONSTRAINTS ON MEASUREMENTS OF DEMAND

The World Tourism Organization defines "cultural tourism" in two ways. The first, narrower, definition is operational in nature, describing it as: "movements of persons for essentially cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages." The broader definition focuses on the benefits of cultural tourism, defining it as: "all movements of persons ... because they satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience and encounters" (Richards, 1996, p. 24). The problem in trying to draw together these two definitions lies in the fact that travelers may engage in the same activities for very different reasons and receive very different benefits (McKercher, 2002; Chang, 2006); they also may pursue vastly dissimilar activities for identical reasons.

Herein lies one of the difficulties in defining demand in the cultural tourism sector. We may identify levels of participation in various activities, but this does not tell us why individuals participate or what they might do in future. We can also explore individuals' attitudes toward cultural tourism, but this is not consistently a good predictor of the activities they will choose to participate in. When estimates of demand are based upon levels of participation in activities broadly classed as "cultural tourism," the danger lies in assuming the same level (and source) of motivation for each participant, often leading to unrealistic estimates of interest. On the other hand, estimating demand based upon stated interest levels also runs the risk of creating unrealistic expectations.

While interest may indeed exist, participation in activities often depends on multiple factors, including price, accessibility, comfort (physical and emotional), and relative levels of interest in activities available at the same time and location.

The Aboriginal Tourism Association of BC (O'Neil Marketing & Consulting et. al, 2005a) gives the following definition of Aboriginal cultural tourism:

> ...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. (p. 3)

When considering demand for Aboriginal cultural tourism, additional factors may come into play. For example, some tourists, despite high levels of interest, may choose not to participate based on fears that their presence is unwanted by, or disruptive to, the Aboriginal community (Insignia Research, 2007, p.15). Others may be skeptical of the available products due to past negative experiences or concerns regarding "authenticity" (Insignia Research, 2007, p.11, p. 17) and choose not to participate due to the perceived "unreliability" of Aboriginal cultural products. Additionally, we must consider the possibility of a social desirability bias toward high self-ratings of interest in Aboriginal products as contributing to high estimates of demand.

CHARACTERISTICS OF ABORIGINAL CULTURAL TRAVELERS

Who are the travelers that are most interested in Aboriginal tourism experiences? A number of different researchers have addressed this topic in various ways. Government-sponsored research has often focused on determining the differences between those who either state an interest in or have previously participated in Aboriginal cultural experiences, and those who do not and/or have not. The most common measures are sociodemographic, such as age, country of origin, income, level of education, and gender; however, some of this research has also inquired into travel motivations and the desired characteristics of products and destinations.

ATBC's Blueprint Strategy Report determined that BC's primary Aboriginal cultural tourism market is made up largely of domestic travelers (45 percent, of which over half are themselves BC residents) and Americans (29 percent). They tend to be baby boomers earning upper-middle incomes. Most are well educated and a majority is female (O'Neil Marketing & Consulting, 2005a, p.10).

Research conducted by Aboriginal Tourism Team Canada (ATTC) found that in both the domestic and American markets, a key segment is the "Dual Track" traveler. These travelers are "those that have sought Aboriginal cultural experiences on trips in the recent past and also like to engage in outdoor activities when traveling" (ATTC, 2001, p. 2). These travelers are deemed by the authors of this report to have "the greatest potential for Aboriginal experiences in Canada because their interests are consistent with the products Canada's Aboriginal communities currently offer – a blend of the outdoors and heritage" (ATTC, 2001, p. 2).

A Travel Attitudes and Motivations Study of the American market gives a demographic profile of "Aboriginal Cultural Experiencers," the 6.6 percent of adult Americans who "engaged in an aboriginal cultural experience while on an out-of-town, overnight trip of one or more night." (Lang Research, 2007, p. 2). Commonly these travelers are married but without children under 18,

are middle-aged or older, and are well-educated, with above average household incomes. They often live in smaller towns or cities and are overrepresented in the "Mountain" and "Pacific" regions and in Alaska and New England. This study also inquired into the benefits of vacations sought by this market, and found that they are more likely than other travelers to be looking to "see or do something new and different," to "create lasting memories, and "to gain knowledge of history, other cultures or other places," as well as a number of other benefits related to challenging and enriching oneself. They are less likely than other travelers to be looking for a break from day-to-day life, or to be searching primarily for rest, relaxation and relieving stress (Lang Research, 2007, p.16). The attributes they desire in a destination are also somewhat different from those of other travelers, being less focused on convenience, safety and familiarity, and more focused on "being at a place that is very different, culturally than mine," and having "lots of things for adults to see and do" (p. 17) Availability of camping is also important to this segment, which supports the idea that these travelers are often also interested in outdoor or nature-based pursuits (p. 17).

Research conducted on behalf of Tourism Yukon has also attempted to segment the groups of tourists who come to the Yukon. Three main target segments were identified, two of which were deemed to be strong potential markets for Aboriginal tourism experiences. The smaller segment, the "Cultural Explorers" (comprising roughly 13 percent of potential travelers to Yukon), are often middle-aged, with an average age of 47, and generally have above-average incomes. They tend to be empty-nesters, retirees, and owners or executives, and are more often female than male. They are intellectually driven and like to experience new lifestyles and see as much as possible (Cameron Strategy, 2005; Tourism Yukon, 2008b). The second segment deemed relevant for First Nations cultural tourism purposes was the "Adventure Challenger" group. This segment, which makes up a larger proportion of potential visitors to Yukon, is primarily motivated by "wilderness oriented and adventure travel activities;" however, they also tend to express interest in First Nations culture (Cameron Strategy, 2005; Tourism Yukon, 2008b)

A number of academic researchers have also investigated the characteristics of cultural travelers. Many of these studies have pointed to the need to further differentiate visitors to cultural attractions from one another, noting that they are not necessarily so homogeneous a group as may be suggested by studies that envision cultural travelers as one segment.

Kim et al. (2007) examined the influence of socioeconomic status on the types of activities to which travelers are attracted. The authors determined that of the four types of cultural tourism attractions they distinguished amongst, those with higher income and higher levels of education were more likely to participate in "Festival and Musical Attractions" and "Knowledge/Aesthetic Seeking Attractions," less likely to participate in "Commercial Recreation Parks," and equally as likely as other travelers to participate in "Local Festival and Fairs" (2007). The suggestion made by the authors is that "although tourism is often promoted as a way of escape from everyday sociocultural routines, the actual choice of cultural consumption in the tourism arena still appears to be dictated by one's *habitus*" (p. 1370).

In another study of cultural travelers, Chang (2006) conducted a survey of visitors to the Rukai Aboriginal Festival in Taiwan, focused around five main motivators/factors for: equilibrium recovery, festival participation and learning, novelty seeking, socialization and cultural exploration. Three clusters, the "Aboriginal Cultural Learners," the "Change of Routine Life Travelers" and the "Active Cultural Explorers," were created using respondents' answers to motivational questions.

Chang found no significant differences in regards to the demographics of the three clusters. What she did find, however, was that a number of different motivational factors attract tourists to an aboriginal cultural festival. Although "cultural exploration" was the highest rated motivator, some tourists attended the festival to escape life routines and for a change of pace rather than for experience and understanding of an Aboriginal culture.

A 1999 study by Moscardo and Pearce, based on research conducted at Tjapukai Aboriginal Park in Australia, also found different levels of engagement and motivations among cultural tourists. The authors used cluster analysis to segment the sample into four groups, which they labeled "Ethnic Tourism Connection," "Passive Cultural Learning," "Ethnic Products and Activities" and "Low Ethnic Tourism." Each group desired different products (e.g. some were more interested in participation and direct contact, while others preferred less involved activities). Unlike Chang, Moscardo and Pearce found significant age differences between the groups, with the "Passive Cultural Learning" group slightly older than the rest (1999, p. 426).

In a similar vein, McKercher (2002) proposes a system of classifying cultural tourists based on two dimensions: (1) "the importance of cultural motives in the decision to visit a destination" and (2) "depth of experience" (p. 29). He suggests that tourists can be classified into five different segments based on these factors: (1) purposeful cultural tourists, who have high motivation to seek cultural experiences and attempt to engage deeply in those experiences, (2) sight-seeing cultural tourists, who have high cultural motivation but engage less deeply, preferring to take photographs and have superficial experiences, (3) casual cultural tourists, for whom culture is only a secondary motivator and do not engage very deeply with experiences, (4) incidental cultural tourists, whose motivation and engagement are both minimal, though they nevertheless do attend cultural tourism experiences, and (5) serendipitous cultural tourists, whose motivation for travel has little to do with cultural tourism yet end up engaging deeply in cultural experiences. McKercher applied this model to a study of visitors leaving Hong Kong, and found that cultural motivations were fairly low in the majority of cases, and engagement also tended to be less intense. His "purposeful cultural tourists" comprised only 12 percent of the sample of cultural tourists, while "sightseeing," "casual," and "incidental" tourists made up 31 percent, 24 percent and 28 percent respectively. These results suggest that the ideal type of cultural tourist, the "purposeful" segment, is much smaller than many

studies imply, accounting for only 12 percent of cultural tourists and less than four percent of tourists in total.

AUTHENTICITY IN CULTURAL TOURISM

Authenticity is a much-debated concept in the academic tourism literature. It is beyond the scope of this paper to do justice to the viewpoints of the many authors who have addressed themselves to the topic; I will attempt here to give a brief overview of some of the more recent and relevant writings.

Cohen (1988) begins his seminal work with a discussion of the argument, primarily advanced by MacCannell (1973) and Greenwood (1977), that (1) tourism leads to "commoditization," (2) "commoditization destroys the authenticity of local cultural products and human relations" (372) and therefore leads to the development of a "staged authenticity" where these products and relations are oriented toward external audiences and lose their meaning to the locals, and (3) that this "staged authenticity" destroys the potential for tourists to have an authentic experience, which is what they are assumed to be in search of (in a manner akin to that of a religious pilgrim) (p. 372).

However, Cohen feels that these postulates are not entirely accurate. He argues that "authenticity," defined as "a quest for that unity between the self and societal institutions, which endowed pre-modern existence with 'reality'" (p. 374), is itself a particularly modern value, and that the desire for it is motivated by an alienation from "modern" or industrial society and its institutions. Different individuals, however, experience this alienation to different degrees. This variance, Cohen suggests, influences the importance that individual tourists place on authenticity in a product or experience. The more alienated they are, the more importance they place on authenticity, and the more importance they imbue this concept with, the less likely they are in turn to have their demands satisfied. This is said to be because the most alienated group of tourists,

labeled the "existential" group, is looking for a new "elective center" (p. 376) for their own existence and trying to find it in the "Other." Like cultural anthropologists and curators, this group places a high premium on authenticity and sets a high standard for its fulfillment (because they are looking to adopt a culture almost as their own). The least alienated group of tourists, on the other hand, labeled the "diversionary" tourists, are not at all concerned with authenticity and are seeking only escape and enjoyment. Cohen's three other tourist types, the "experimental," "experiential" and "recreational" tourists, occupy stages between these two extremes in their demands for authenticity. The argument is made that "most rank-and-file tourists will be content with much wider, less strict criteria of authenticity" (p. 376).

Similarly to Cohen, Wang (1999) sees the modern tourist as reacting against an alienation often present in modern industrial life and routine. Both see the concern with authenticity as a particularly "modern" preoccupation, caused by a sense that one's own life is not as "natural" or "real" as one would like it to be. Unlike Cohen, however, Wang envisions the authenticity that people seek as residing not exclusively in an object "Other" but in a subject self (p. 364). Therefore, tourists may achieve an "authentic" experience even if objects and displays that are a part of that experience are not authentic, or even judged to be so. Wang labels this type of experience as "existential authenticity." He states that: "unlike the object-related case which is the attribute, or the projected attribute, of objects, existential authenticity is a potential existential state of Being which is to be activated by tourist activities" (p. 352). "In common sense terms, existential authenticity denotes a special state of Being in which one is true to oneself, and acts as a counter dose to the loss of "true self" in public roles and public spheres in modern western society" (p. 358, drawn from Berger, 1973).

The concept of authenticity is discussed in relation to the European markets in Insignia Research's (2007) report for the CTC. Drawing on the results of focus groups conducted with travelers and potential travelers, a thought process is described whereby the first thing that comes to

mind is an "Indians on the Prairie" stereotypical image, followed by the remembrance that this is not accurate, then doubt as to whether the possibility of an authentic experience exists at the present time (p. 17). The authors suggest that this confusion and backtracking is disruptive to desire for Aboriginal tourism experiences, and causes many tourists to avoid booking in advance as they feel checking things out in person allows them to avoid "tourist traps."

It is suggested that Aboriginal cultural tourists want to be very much like cultural anthropologists doing fieldwork – allowed to interact and observe "other cultures" and learn in a participatory, partially self-directed sort of way, rather than being lectured at or performed for. However, the need for the experience to be both "comfortable" and "authentic" may be irreconcilable with such desires – living on reserve may be highly uncomfortable while living in a teepee may be less than authentic in many circumstances. The ideal is to explore "living cultures" rather than "staged authenticity," but the ubiquity of technology and industrial components in First Nations societies these days may cause tourists to feel "authenticity" no longer exists.

This approach, however, appears to be drawn more from objectivist notions harking back to MacCannell and fails to consider more recent contributions to the topic from Cohen and Wang, among others. The conclusion that tourists are in most or all cases seeking such a high level of authenticity (objective or existential in nature) is also questionable in light of the various segmentation studies discussed above. Ryan and Huyton (2002) directly claim that tourists, rather than engaging in learning, pseudo-anthropological explorations, are really well aware that they are tourists and are often more interested in relaxation and fun than educational activities. In fact, they suggest that marketing "authenticity" may be less important (and possibly more dangerous) than has been assumed and that the best way to market cultural products is to admit frankly that they are not 100 percent "authentic" but "can offer an entertainment based upon some aspects of another culture" (p. 644). The term "authorization" is suggested as a more appropriate term than "authenticity."

Zeppel (2002) also found that comments and complaints from visitors to the Cowichan Native Village in Duncan, BC varied widely in their perception of how "authentic" or "commercialized" the attraction was. Some were impressed with the guides and the knowledge they shared, while others mentioned that they were disappointed that they had not met a "real Indian." (All of the staff at the Cowichan Native Village is Cowichan or Coast Salish.) Equally, some visitors praised the center for being "not at all commercial" while others called it "a bit too touristy" (2002, p. 99).

Expectations of "authenticity" are never straightforward. What is fairly clear, however, is that the same product or attraction may be experienced as more or less authentic by different travelers, for several different reasons. How satisfied each is with the authenticity of their experience will depend as much upon his or her own motivations, attitudes and previously held ideas as upon the nature and quality of the product itself. Thus Aboriginal cultural tourism businesses must be aware of the variety of expectations held by their customers, and determine according to their own particularities how best to manage them.

NATURE-BASED TOURISM AND ABORIGINAL BUSINESSES

One of the strategies recommended by a number of researchers for making the most of resources and existing expectations is to develop businesses that combine aspects of Aboriginal culture with nature-based tourism products, such as outdoor pursuits, educational activities and displays revolving around land use, plants and animals, medicines, and traditional crafts incorporating natural materials. A key draw for many travelers to Aboriginal attractions is the idea that "Aboriginals in Canada commune closely with nature and therefore they could provide insights, perspectives, or aspects of nature that are unique from other Canadian tourism products" (Insignia Research, 2007, p. 18).

Because Canada is primarily viewed as a scenic/outdoor destination (Insignia Research, 2007), and because this is the main reason of many foreign travelers for visiting Canada at all, products which target visitors drawn to "nature" and "wilderness" are more likely to be successful than those which are solely based around "culture." As noted above, a great deal of research has also found that Aboriginal culture is rarely the primary reason for tourists to visit a destination (e.g. Ryan and Huyton, 2000; 2002, Insignia Research, 2007, ATTC, 2001) and therefore such research has suggested that products be based upon a combination approach, using cultural aspects as "value-added" components of an outdoor or nature-based product or package.

Ryan and Huyton note (2000, p. 27) that a correlation exists between interest in national parks and Aboriginal culture. They suggest that (perhaps particularly with overseas tourists) there is a trend toward viewing parks in a way that sees them as both natural and spiritual locations, and has much to do with Aboriginal concepts of the land. In fact, they suggest that this is perhaps the one area in which tourists do experience a deep connection with Aboriginal culture, gaining some understanding of the people through the landscape and vice versa.

The Dual Track market segment identified by ATTC in the domestic and American markets also suggests that cultural activities might be more easily marketed in combination with outdoor pursuits. Even those strongly interested in Aboriginal cultural tourism may also be drawn to many other products; those that can offer both an educational/cultural experience and an opportunity to experience Canada's natural attractions will have a competitive edge. Research has also shown that those who rate cultural activities highly tend to be the same people who rate all types of experiences more highly and are more likely to participate in many activities, both on trips and when at home (Lang Research, 2007). This all-encompassing enthusiasm means that Aboriginal cultural products have to compete with other products even for their core market segments. Thus playing up the connection between Aboriginal culture and the Canadian environment is a strongly recommended strategy both in marketing and in business development.

ABORIGINAL CULTURAL TOURISM IN CANADA

Several broad generalities can be pointed to, in regards to the positioning of Canadian Aboriginal cultural tourism in the world market. First, there is extremely low top-of-mind awareness (TNS Canadian Facts, 2007, Cook Consulting, 2004a). Research conducted for the Aboriginal Tourism Association of BC's Blueprint Strategy on Aboriginal tourism found that over half of visitors surveyed at Visitor Information Centres and Aboriginal tourism attractions "indicated that they did not have any pre-trip familiarity with such opportunities in BC" (O'Neil Marketing & Consulting et al., 2005, p. 6). Only seven percent rated themselves "very familiar with opportunities for Aboriginal tourism experiences in BC prior to their trip" (p. 6). Bearing Point and Goss Gilroy, in fact, in a report for Aboriginal Tourism Team Canada, suggest that "prospective tourists are unaware of the many experiences that Canadian Aboriginals have to offer them. A comprehensive promotional campaign needs to be developed and implemented in order to attract domestic and international travelers to Aboriginal tourism destinations" (2003, p. 56).

Many other destinations consistently rank higher on tourists' lists of places to go for Aboriginal tourism. In a study for the Canadian Tourism Commission, long-haul travelers in a number of primary and secondary markets were asked to list destinations for Aboriginal tourism (TNS Canadian Facts, 2007). Australia was mentioned by the largest number of travelers in the US, UK, French, Japanese, and Chinese markets, as well as in the Australian domestic market itself. New Zealand, South/Central America, Africa, and Southeast Asia also were consistently listed by a large number of travelers. Canada, on the other hand, was mentioned by only three percent of travelers from the US, UK, and Japan, and by similarly small numbers from France, Germany, Mexico and Korea. Awareness was only slightly higher in Australia (seven percent) and China (13 percent) (2007, p. 11). Of prospective travelers to Canada interested in Aboriginal tourism, a different report prepared for the CTC found that eight percent of UK travelers and 12 percent of

German travelers mentioned Canada as country that comes to mind when thinking of Aboriginal tourism (Insignia Research, 2007, p. 30).

Interest, however, remains high for Aboriginal tourism products in Canada, despite these low levels of awareness. Of those judged "potential Canadian travelers," 82 percent of the French market, 72 percent of the German market, and 46 percent of the UK market were interested in Canadian Aboriginal products (Insignia Research, 2007, p. 39).

Second, individual markets also present different levels of demand, and for sometimes vastly different products. While German, French and British travelers are often looking for interactive, extended experiences where they can learn about Aboriginal culture in a hands-on way (Insignia Research, 2007), the experiences desired by domestic travelers, American travelers, and those from secondary markets such as Japan or Korea may be very different. Research conducted for ATBC's Blueprint Strategy found that while German and Swiss travel trade representatives were interested (on behalf of their clients) in trips of a long duration, often in remote locations, the Japanese market was far more receptive to shorter trips close to major city centres, as well as trips oriented around a particular theme, such as food or medicine (O'Neil Marketing & Consulting et al., 2005).

Third, there are concerns among tourists that products offered may be "inauthentic." Qualitative research conducted by Insignia for the CTC found that "those interested in Aboriginal travel want to be able to have extended, direct contact with natives who are living their native lifestyle" (Insignia Research, 2007, p. 48). However, expectations of what the "native lifestyle" consists of may be unrealistic, driven by inaccurate and/or dated representations of First Nations people in films, television, books and other materials. Travelers may quickly realize that they are unlikely to find many Aboriginal people living the way they are portrayed in such materials, and come to the conclusion that "there is no authentic culture" anymore (p. 16; p. 49). They will often

shy away from products that appear "staged" (p. 17); however, too much of a "modern" approach may not encapsulate the images driving their desire for these experiences. Thus Aboriginal cultural tourism operators are caught in a double bind: if they attempt to present the stereotypical image that tourists may initially expect, they will be accused of having "staged" the experience. If, on the other hand, they present things as they are today, they may not meet tourists' expectations for a "cultural experience."

Additionally, a frequent worry among tourists appears to be that their presence is unwanted by Aboriginal communities. This has to do with an uncertainty as to whether it is actually Aboriginal people themselves who are promoting products. The focus groups facilitated by Insignia Research found that travelers felt that Canadian advertising does not showcase Aboriginal culture sufficiently, as evidence by comments such as "They never refer to it," and "I would think the Indians don't want us" (2007, p. 31).

Finally, there appears to be a lack of market-ready product to satisfy demand (Cook Consulting 2004a). This is not to say that there are no products available, but that those offered are not always accessible, appropriate, and attractive to the intended markets. 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 (BearingPoint and Goss Gilroy, 2003, p. 9). Travel trade representatives also expressed some wariness about including Aboriginal tourism products in packages, due to concerns over product quality: "There is a concern amongst international tour operators over the level of quality and authenticity of some Aboriginal tour products being offered" (p. 8). In addition, they note that:

> The physical environment of many Aboriginal communities is also believed to constrain Aboriginal tourism. Visitors require well-maintained communities that are visually

> appealing, safe, have good transportation access (i.e. roads, planes, boats), and business services such as health, police and financial. These infrastructure prerequisites are absent in many communities. (BearingPoint and Goss Gilroy, 2003, p. 90)

These issues relate fundamentally to supply side issues such as funding availability (and information on such opportunities), operator knowledge and local circumstances, including attitudes to tourism and the economic circumstances of the community. However, what is important to keep in mind, from a demand perspective, is that although desire, both on the parts of consumers and travel trade representatives, exists, it is fairly specific and varies both in degree and in kind by market, by demographic, and by location. Thus Aboriginal tourism operators developing or starting businesses should, like other tourism business operators, have a good idea of what products and ideas are appropriate to their targeted markets, and not assume that demand is universal.

ABORIGINAL CULTURAL TOURISM IN THE NORTHERN CONTEXT

Although subject to many of the same influences and trends as the rest of Canada, tourism in the Yukon, as a remote and northern destination, presents its own unique advantages and challenges. The ATTC regards both the winter off-season and the remote location of many products as challenges throughout Canada (Aboriginal Tourism Team Canada, 2001). It is noted that Canada is seen more as a summer destination and that the small niche market for winter products must be addressed specifically. This applies particularly to the North, where the winter is far longer than the summer, and where far fewer tourists venture at all. Interestingly, however, proportionally more Americans and overseas tourists include time in the North on their trips than do Canadians. In fact, Insignia found that in a ranking of the desirability of regions, the Yukon comes third (after BC and Alberta, and after Quebec for French travelers) among those interested in Aboriginal tourism (Insignia Research, 2007).

The remote location comprises both an attraction for tourists and an obstacle. Visitors must in most cases travel long distances to reach their destination, either by air or ground – neither is an inexpensive option. Upon arrival, car use is essential to visit most attractions, and in many cases, the location of those attractions is not well advertised. Yet, the very fact of having traveled so far initially may make tourists more open to traveling a bit further in search of a desired attraction. Petterson (2002) in his study of cultural tourism among the Sami in Sweden, found that those visitors (usually Germans) who had traveled the furthest to reach their destination were the least likely to weight the value of an attraction based on its driving distance. It is also likely that the further one must go in search of a particular experience, the greater is the sense of discovery and adventure. Difficulties around access may also heighten perceptions of how "authentic" a product is, through an increased sense of the product's degree of difference from the usual milieu of the traveler.

An additional parallel with the Sami case is that the traditional adaptations and lifestyles of the indigenous groups in each place are draws to tourists; yet in both cases many indigenous people are unable to subsist solely on "traditional" resources, and many turn to industry or tourism as economic alternatives. In both cases, the incorporation of modern technologies and systems into indigenous communities and businesses may result in the introduction of doubts among visitors as to the authenticity of the experience (Petterson, 2002).

A case study from closer to home is found in Notzke's (1999) study of indigenous tourism development in the Arctic. Addressing both host and guest perspectives, Notzke describes her own mixed-methods research in Inuvik and Tuktoyaktuk, including participant observation, semi-structures interviews with stakeholders, and questionnaires distributed to tourists at Inuvik (p. 70-73). The results indicated extremely high interest in Aboriginal culture (probably higher than in the Yukon, where a lesser percentage of the population is Aboriginal), and a very high level of participation in Aboriginal tourism as well as informal contact with Aboriginal people (much higher

than in BC, and again, likely higher than in the Yukon). Although some frustration was expressed with the tour companies operating in the area, most visitors reported very positive experiences overall and high levels of satisfaction with their time spent there. The demographics of the sample are usual for the North, and for Aboriginal tourism experiencers in general – older, well-educated, well-paid. The author notes that her sample is probably biased toward education (41 percent had post-graduate degrees) because of the higher likelihood of those with exposure to university research responding in a positive manner and returning a completed questionnaire.

Notzke reports that most of the impressions of Aboriginal people reported were not based in stereotypes and had a fairly balanced view; however, peoples' expectations surrounding tourism ventures may have been unrealistic. She suggests that the industry, especially in remote and harsh locations in the North, may be such that the sporadic and unpredictable nature of tours is inevitable, but that it can be dealt with by educating tourists about the contingencies that may arise and making it part of the whole tourism experience (p. 72).

CONCLUSIONS

The issues affecting demand for Aboriginal cultural tourism experiences, both in Canada and elsewhere in the world, are complex. Although a great deal of research has been conducted around cultural tourism, both at home and internationally, the constantly changing nature of the industry means that such research must continue steadily in order to keep up with emerging trends and challenges. Local, national and global trends have the potential to both adversely and positively impact demand over short and long timeframes, shaping the types of experiences that most appeal to travelers as well as affecting the budgets of businesses and customers alike. It is strongly advisable for cultural tourism business operators not to assume constant or continuing demand for a particular type of product, even among markets that currently show a strong growth potential.

Adaptability is key, as is keeping abreast of current trends and opportunities, in order to make best use of market niches where they appear.

The present document aims to describe a few of the trends and patterns that might be most relevant to Aboriginal tourism businesses in Yukon. In order to link these trends and patterns to the local context, and to provide current, specific data for local businesses, Tourism Yukon conducted research over the summer of 2008 into demand for Aboriginal cultural tourism in Yukon. The results, presented in the preceding report, are intended to provide First Nations communities and businesses, as well as the Yukon tourism industry in general, with a clearer view of the issues surrounding guests' demand for, and perspectives on, Aboriginal cultural tourism in Yukon.

APPENDIX B: SURVEY METHODOLOGY

SURVEY DEVELOPMENT

In consultation with the Yukon First Nations Tourism Association (YFNTA), staff in the Research and Product Development branch of the Yukon government's Department of Tourism and Culture drafted a list of survey questions, pooling questions and answer options from a variety of materials. In order to maintain the ability to directly compare our data with that of other researchers, we attempted, where possible, to keep our questions and answer categories similar to those used elsewhere. Materials drawn on included the 2004 Yukon Visitor Exit Survey, or YVES (Department of Tourism and Culture, 2006), the Travel Attitudes and Motivations Study (TAMS) (Lang Research Inc., 2007), as well as research conducted under the Aboriginal Tourism Association of BC (ATBC) Blueprint Strategy (O'Neil Marketing & Consulting et al., 2005; 2006), and a recent report prepared for the Canadian Tourism Commission (CTC) (Insignia Research, 2007). Demographic questions in particular were designed to be consistent with the YVES. In many cases, however, questions were modified or replaced due to the need to collect context-specific data, and several open-ended questions were also inserted.

Prior to drafting the survey questions, a major literature review of government and academic documents relating to cultural tourism (see Appendix A) was conducted. Based on themes encountered during this process, several questions were included that related to the benefits that different tourists might hope to obtain from cultural travel experiences. This was done in order to make it possible to compare our data with tendencies identified in the literature (e.g. whether tourists were primarily looking for learning-centred experiences, spiritual renewal, or fun and entertainment, and whether such preferences varied by demographic).

The draft survey was pilot-tested, using paper surveys read out to travelers in the Whitehorse Visitor Information Centre (VIC). It was quickly deemed to be too long to support face-to-face administration. As it was felt that many of the lengthier questions, including some with open-ended answers, were important, the decision was made to develop two versions of the survey: the first, on paper, would be handed out to respondents for self-administration, and included most of the questions originally included in the pilot questionnaire; the second, considerably shortened version was uploaded to hand-held data collection devices for face-to-face administration. All of the questions asked in the face-to-face intercept survey appeared in identical format on the paper version of the survey; the only difference was the additional questions.

DATA COLLECTION

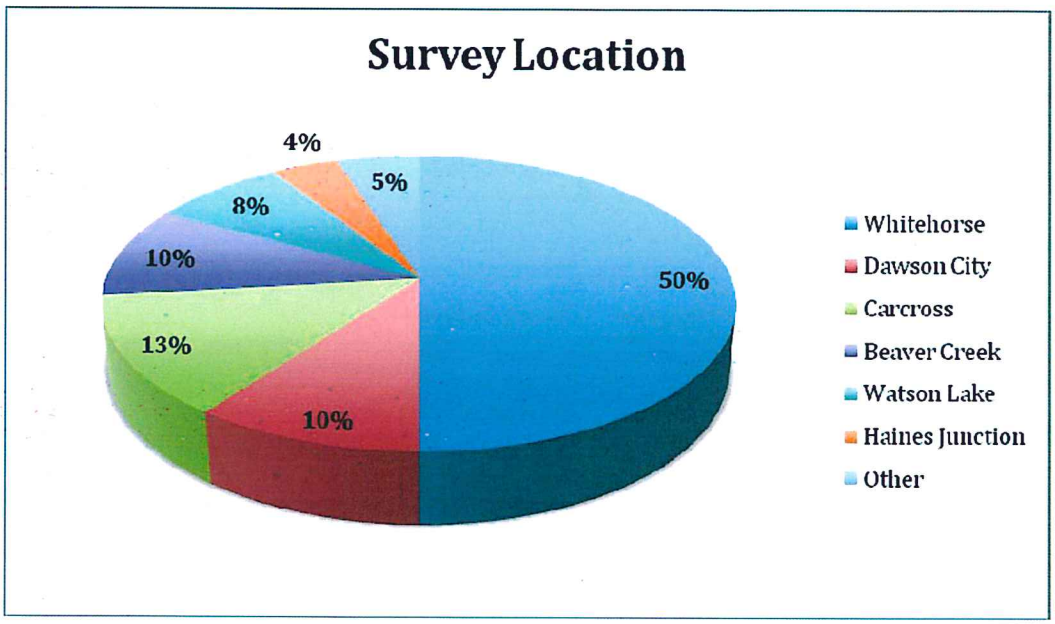
Two research assistants (including the author of the present document) were hired for the summer of 2008 by the Department of Tourism and Culture through the STEP program (Student Training and Employment Program) to participate in the development of the survey and to collect all data for the project. The data collection phase began in June, and continued through early August.

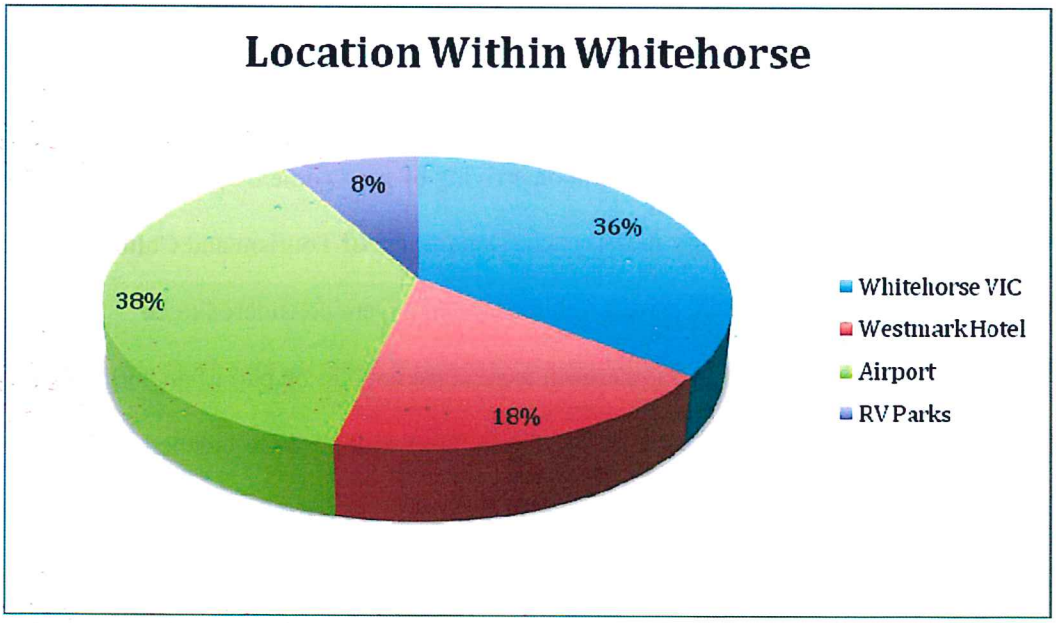
A limited number (51 interviews, or 11 percent of the total number) of face-to-face intercepts were conducted in the Whitehorse Visitor Information Centre and in campgrounds located in the Whitehorse area. Due to the length of the survey (it still took up to 20 minutes in total, depending upon the respondent's answers), campgrounds were the only locations where respondents were generally free of other commitments for long enough to complete the survey. Due to time pressures, the majority of the surveys were collected using the paper version.

Paper surveys were distributed in English, French and German at all six Visitor Information Centres (VICs) in the Yukon. These VICs are located in Whitehorse and five other Yukon communities: Dawson City, Carcross, Haines Junction, Beaver Creek and Watson Lake. VIC staff

members were informed of the project's goals, and were asked to collect completed surveys for return to the Whitehorse office. We also distributed surveys on clipboards to travelers in two locations: Whitehorse International Airport and the Westmark Hotel, also in Whitehorse. By collecting surveys at the Westmark Hotel, we were able to reach organized group travelers with Holland America, who frequently depart from the Westmark on tours to other parts of the Yukon and Alaska, and often spend half an hour or more in the hotel lobby waiting for their coaches to arrive. At the airport, we were able to specifically target German travelers departing on the Condor flights, and to administer the paper surveys in German. It also allowed us to collect large numbers of surveys in a short period of time; had we used face-to-face intercepts at the same locations, our captive audiences would have dispersed for their coaches or planes before we had completed more than two or three interviews.

A total of 458 paper surveys were collected, just over half of which (230) were collected in Whitehorse. Of these 230 surveys, 94 were conducted at Whitehorse International Airport, 46 at the Westmark Hotel, and 19 at various RV parks around the Whitehorse area, as well as 88 conducted at the Whitehorse Visitor Information Centre. The remaining 228 surveys were collected at Visitor Information Centres outside Whitehorse. Of these, 58 came from Carcross, 43 each came from Dawson City and Beaver Creek, 38 came from Watson Lake, and 19 came from Haines Junction.





As incentives to encourage participation, we provided small Yukon pins to all travelers who completed a survey, and also offered respondents a chance to have their names entered into a draw for a gold nugget valued at approximately $1,000.00. Both incentives were well received by potential respondents; however, the pins were vastly more popular. Some respondents indicated a

reluctance to provide us with their personal details for the purposes of the prize, fearing that they would be used to send promotional materials or provided to third parties; almost all, however, were happy to receive a pin.

CHALLENGES AND LIMITATIONS

Representation and Sampling

The overall margin of error for our results is +/-4.5%, with a confidence level of 95 percent. However, a number of specific limitations are noteworthy. As data collection took place only in the summer months, we missed out on the subset of travelers who visit the Yukon in other times of the year. The vast majority of travelers to Yukon do visit in the period from May to August (Department of Tourism and Culture, 2008); however, those who choose to come in winter or fall may represent a very different population from that of our sample, and we therefore cannot generalize beyond summer travelers.

Approximately 62 percent of visitors to Yukon arriving by road come by private vehicles, with the remaining 38 percent traveling by motorcoach (Department of Tourism and Culture, 2008).[3] For the purposes of this research, private vehicle travelers were considered to be "independent" and those who traveled by motorcoach were considered to be part of an "organized group." Our sample overrepresented independent travelers (79%) as opposed to independent travelers (21%). Although the majority of travelers to the Yukon do indeed come independently, the ratio is closer to 3:2 than 4:1. The reason for this bias in our sample has to do with the difficulties encountered in accessing group travelers. While most independent travelers follow their own schedules and are not greatly inconvenienced by spending five or ten minutes completing a survey,

[3] A significant number of travelers also arrive by air. Unfortunately, the only available numbers for air arrivals count both tourists and Yukon residents returning home, and are therefore not interpretable for tourism purposes. Most of the travelers who arrive in this manner, however, can be assumed to be traveling independently.

passengers on motorcoaches are under strict timelines. They may be dropped off by the tour company at a VIC en masse, but usually stay for only a very short period of time, during which their priorities usually include a bathroom break and gathering literature. A ten-minute survey is usually too long for travelers on this sort of schedule to complete comfortably, and therefore very few surveys were completed with bus travelers at most locations. The Westmark Hotel in Whitehorse, in fact, was the only location where access to this group was reliably obtained.

Most travelers to the Yukon in 2007 came from the United States (73 percent) with a further 18 percent coming from within Canada (approximately half of whom were Yukon residents) and only nine percent from elsewhere (Department of Tourism and Culture, 2008c). Our sample over-represented Canadian travelers (41 percent) and foreign travelers from outside North America (25 percent), while under-representing Americans (33 percent). This was, however, necessary in order to collect statistically valid data on foreign markets. Even at that, we were able to divide foreign travelers into only three categories, each of which was quite small. These included Germans (16 percent of our total sample), "Other Europeans" (6 percent) and "Other Foreign" (3 percent).[4] In order to correct for the differences in country of origin between our sample and the overall breakdown of Yukon visitors, data weighting techniques were employed. Where appropriate, a "weighted total" column was incorporated into graphs to show the distribution of data once weighted by country of origin.

The gender balance of our sample was the reverse of that found in the Yukon Visitor Exit Survey, with 53 percent female respondents and 47 percent male. This is likely to be due to the fact that couples traveling together would frequently fill out a survey together. As mentioned above, although we requested that only one person fill out each survey, this was impossible to ensure with paper surveys, and in practice we often ended up with a joint effort with the wife's demographic

[4] This category is too small to be statistically valid, but nonetheless can be used to see general trends.

information attached. Nonetheless, the gender balance was fairly even; however, this practice does mean that we cannot always be certain that the age and gender information that we obtained reflects that of the individual whose answers to other questions were recorded.

Response Biases and Misinterpretations

With only two interviewers and a limited number of campgrounds and RV parks to visit, face-to-face survey collection was a slow process. Therefore, we relied heavily upon the paper surveys to obtain our sample quota. While we did in fact exceed our target, there are several problems with the use of paper survey data, which, while not rendering results invalid, merit a mention. The most significant of these was the "team effort" issue, whereby a husband and wife would frequently complete a single survey as a couple. Thus we would have demographic information for one member of the couple but no clear idea as to whose answers to specific questions about products and interests we were receiving. When conducting face-to-face surveys, we were able to discourage this practice; however, this was not possible with the paper versions.

A further issue with paper questionnaires was that many respondents appeared to misinterpret the open-ended questions. As with the above issue, such misunderstandings could be corrected in a face-to-face situation, but not with the paper versions. In some cases this may have had to do with language difficulties, and in some cases travelers may simply not have read the questions closely. As this problem was observed mainly with the open-ended questions, it posed no problems for our quantitative data but did render some of our qualitative data useless.

A survey of this type is also vulnerable to response biases. During the collection and input of data, it was noted that a small but potentially significant number of respondents rated all scale questions a "ten out of ten." This enthusiasm for the activities and benefits they were describing may be viewed in three ways: firstly, it is possible that some of these respondents were genuinely very interested in all of the possible products they were presented with that "ten" was an

appropriate answer. Secondly, some respondents may have simply wished to complete the survey, either out of a desire to be helpful or for the purposes of being entered in the prize draw, but did not take the time to consider the questions thoroughly (or at all). Thirdly, these answers may be due to social desirability bias. It has been noted that survey respondents sometimes respond to questions in a manner that they feel is socially valued (ORC International, 2007). Some respondents may have felt that giving highly positive evaluations of their own interest in Aboriginal cultural tourism products was more acceptable than reporting low or medium levels of interest. While conducting research, we occasionally overheard comments from respondents to the effect that "it would be rude to say less than [such and such a rating]." This possibility is also supported by the fact that many respondents gave unrealistic answers to another question regarding interest in Aboriginal cultural tourism. When asked how many experiences of this sort they might be interested in taking in on their current trip, respondents frequently gave numbers that would be impossible to fit in given their schedule (e.g. 4-6 experiences when they were spending only 2 or 3 days in Yukon. Such answers may, again, have to do with respondents not carefully considering the question, or may have to do with social desirability bias, or both.

APPENDIX C: A NOTE ON TERMINOLOGY

Aboriginal Tourism Team Canada (ATTC) defines Aboriginal as "a person of Aboriginal origin including status and non-status, First Nations, Métis, and Inuit" and First Nation as "a single Band or group of Bands affiliated with a Tribal Council or cultural group" (ATTC, 2000).

During survey development, the decision was made to use the term "Aboriginal," as opposed to "First Nations." This choice was due to (1) a desire to be consistent with existing literature, and (2) ease of understanding for respondents. Although "First Nation" is the more frequently used term in Yukon, "Aboriginal" was viewed as a more inclusive, all-encompassing term and one that visitors would likely be more familiar with. A small text was included in paper versions of the survey to clarify for respondents the meaning of "Aboriginal":

"By Aboriginal, we are referring to the people indigenous to Yukon, also known as First Nations, Natives or North American Indians."

REFERENCES

Aboriginal Tourism Team Canada (ATTC). (2001). *Demand for Aboriginal Tourism Products in the Canadian and American Markets: Executive Summary.* Ottawa: Aboriginal Tourism Team Canada.

Aboriginal Tourism Team Canada (ATTC). (2000). *Aboriginal Cultural Tourism: Checklist for Success: How to Develop a Successful Cultural Tourism Business.* Ottawa: Aboriginal Tourism Team Canada.

BearingPoint and Goss Gilroy Inc. [Prepared for Aboriginal Tourism Team Canada]. (2003). *Aboriginal Tourism in Canada. Part II: Trends, Issues, Opportunities and Constraints.* Ottawa: Aboriginal Tourism Team Canada.

Canadian Tourism Commission. (1999). *Packaging the Potential – A Five-Year Business Strategy for Cultural and Heritage Tourism in Canada.* Ottawa: Canadian Tourism Commission.

Canadian Tourism Commission. (2007). *Canada's Tourism Performance: National Tourism Indicators, Q4 2007 and Annual 2007*. Retrieved August 11, 2008, from http://www.corporate.canada.travel/docs/research_and_statistics/stats_and_figures/nti/NTI_q4_2007_eng.pdf

Insignia Research. [Prepared for the Canadian Tourism Commission]. (2007). *Aboriginal Tourism Opportunities for Canada (U.K., Germany, France).* Ottawa: Canadian Tourism Commission.

Canadian Tourism Commission. (2008). *Canada's Tourism Performance: National Tourism Indicators, First Quarter 2008*. Retrieved August 11, 2008, from http://www.corporate.canada.travel/docs/research_and_statistics/stats_and_figures/nti/NTI_q1_2008_eng.pdf

Chang, J. (2006). Segmenting Tourist to Aboriginal Cultural Festivals: An Example in the Rukai Tribal Area. *Tourism Management 27*, 1224-1234.

Chhabra, D., Healy, R. and Sills, E. (2003). Staged Authenticity and Heritage Tourism. *Annals of Tourism Research 30 (3),* 702-719.

Cohen, E. (1988). Authenticity and Commoditization in Tourism. *Annals of Tourism Research 15,* 371-386.

Cameron Strategy Inc. [Prepared for Tourism Yukon]. (2005). *Yukon Tourism Brand Strategy Research Report.* Whitehorse, YT: Queen's Printer

Cook Consulting Inc. [Prepared for Aboriginal Tourism Canada]. (2004a). *Environmental Scan 2004: Aboriginal Tourism in Canada: Final Report.* Ottawa: Aboriginal Tourism Canada.

Cook Consulting Inc. [Prepared for Aboriginal Tourism Canada]. (2004b). *Traveling With Wisdom: Aboriginal Tourism Industry in Canada. (Working copy).* Ottawa: Aboriginal Tourism

Canada.

Hou, J. S., Lin, C.H. and Morais, D.B. (2004). Taiwanese Visitors to Pei-Pu, Taiwan Antecedents of Attachment to a Cultural Tourism Destination: The Case of Hakka and Non-Hakka. *Journal of Travel Research 44,* 221-233.

Kim, H., Cheng, C.K. and O'Leary, J.T. (2007). Understanding Participation Patterns and Trends in Tourism Cultural Attractions. *Tourism Management 28,* 1366-1371.

Kolar, T. and Zabkar, V. (2007). The Meaning of Tourists' Authentic Experiences for the Marketing of Cultural Heritage Sites. *Economic and Business Review 9(3),* 235-256.

Lang Research Inc. (2007). *Travel Attitudes and Motivations Study (TAMS): Aboriginal Cultural Experiences While on Trips of One or More Nights: US Travel Market.* Retrieved May 21, 2008, from http://www.tourism.gov.on.ca/english/research/travel_activities/US%20 TAMS%202006%20_Aboriginal%20Cultural%20Experiences.pdf

McKercher, B. (2002). Towards a Classification of Cultural Tourists. *International Journal of Tourism Research 4,* 29-38.

Moscardo, G. and Pearce, P.L. (1999). Understanding Ethnic Tourists. *Annals of Tourism Research 26(2),* 416-434.

Notzke, C. (1999). Indigenous Tourism Development in the Arctic. *Annals of Tourism Research 26(1),* 55-76.

O'Neil Marketing & Consulting, Dr. Peter Williams, Small Planet Consulting Inc. & DMRussell Consulting Inc. [Prepared for the Aboriginal Tourism Association of BC]. (2005a). *Aboriginal Cultural Tourism Blueprint Strategy for BC: Full Report.* Retrieved May 20, 2008, from http://www.aboriginalbc.com/corporate/marketingresearch

O'Neil Marketing & Consulting, Dr. Peter Williams, Small Planet Consulting Inc. & DMRussell Consulting Inc. [Prepared for the Aboriginal Tourism Association of BC]. (2005b). *Blueprint Strategy: Consumer Intercept Survey.*

O'Neil Marketing & Consulting, Dr. Peter Williams, Small Planet Consulting Inc. & DMRussell Consulting Inc. [Prepared for the Aboriginal Tourism Association of BC]. (2006). *Blueprint Strategy: Visitor Post Trip Survey.*

ORC International. (2007). *Methodologies: Dealing With Social Desirability Response Bias in Market Research.* Retrieved January 17, 2009, from http://www.orc.co.uk/news/methodologies/Social-desirability-response-bias.asp

Pettersson, R. (2002). Sami Tourism in Northern Sweden: Measuring Tourists' Opinions Using Stated Preference Methodology. *Tourism and Hospitality Research 3(4),* 357-369.

Price Waterhouse Coopers. [Prepared for Aboriginal Tourism Team Canada & the Canadian Tourism Commission]. (2000). *Demand for Aboriginal Culture Products in Key European Markets 2000.* Ottawa: Canadian Tourism Commission.

Richards, G., ed. (1996). [2005]. *Cultural Tourism in Europe.* Wallingford, UK: CABI International. Retrieved August 4, 2008, from http://www.tram-research.com/cultural_tourism_in_europe.PDF

Ryan, C. and Higgins, O. (2006). Experiencing Cultural Tourism: Visitors at the Maori Arts and Crafts Institute, New Zealand. *Journal of Travel Research 44,* 308-317.

Ryan, C. and Huyton, J. (2000). Aboriginal Tourism: A Linear Structural Relations Analysis of Domestic and International Tourist Demand. *International Journal of Tourism Research 2(1),* 15-29.

Ryan, C. and Huyton, J. (2002). Tourists and Aboriginal People. *Annals of Tourism Research 29(3),* 631-647.

Tjapukai Aboriginal Cultural Park. (2007). *Frequently Asked Questions.* Retrieved August 14, 2008, from http://www.tjapukai.com.au/faq.html

TNS Canadian Facts. [Prepared for the Canadian Tourism Commission]. (2007). *Interest in Aboriginal Tourism: Multi-Country Study.* Ottawa: Canadian Tourism Commission.

Tourism Yukon. (2006). *2004 Yukon Visitor Exit Survey.* Whitehorse, YT: Queen's Printer.

Tourism Yukon. (2008a). *2009 Tourism Yukon Situational Analysis.* Whitehorse, YT: Queen's Printer.

Tourism Yukon. (2008b). *2008-2009 Tourism Yukon Strategic Plan.* Whitehorse, YT: Queen's Printer.

Tourism Yukon. (2008c). *Yukon Visitor Statistics: 2007 Year-End Report.* Whitehorse, YT: Queen's Printer

Wang, N. (1999). Rethinking Authenticity in Tourism Experience. *Annals of Tourism Research 26(2),* 349-370.

World Tourism Organization (WTO). (1985). *The State's Role in Protecting and Promoting Culture as a Factor of Tourism Development and the Proper Use and Exploitation of the National Cultural Heritage of Sites and Monuments for Tourism.* Madrid: World Tourism Organization.

Yeoman, I., Brass, D., & McMahon-Beattie, U. (2007). Current Issue in Tourism: The Authentic Tourist. *Tourism Management 28,* 1128-1138.

Zeppel, H. (2002). Cultural Tourism at the Cowichan Native Village, British Columbia. *Journals of Travel Research. 41,* 92-100.