

Aboriginal-themed giftware market in major Vancouver tourism sites

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Please note!

This study is designed to procure information and hypotheses about observable trends in the Aboriginal-themed giftware market in Vancouver's major tourism sites.

The methodology employed was primarily qualitative with quantitative features. All numerical estimations are based on qualitative observations.

The scope of the research was limited by time and budget constraints.

Given these parameters, the study is to be considered solely as a preliminary study. Accordingly, its results should be treated as impressions of the phenomenon examined, impressions that can only be confirmed by further research.

Introduction

Goals

- Overview of the level of Aboriginal participation in the Aboriginal-themed giftware market in the major tourism sites of Vancouver
- Overview of the repercussions of this level of participation on the revenue generated by this market for Aboriginal individuals and companies

Methods

- Retail store sample
- Observations in retail stores
- Product and business research
- Product classification
- Estimation of display space distribution
- Artist survey
- Other qualitative research
- Estimation of revenue distribution

Focus

- Major Vancouver tourism sites
- Retail stores
- “Aboriginal-themed giftware”:
Artworks, gifts and souvenirs

Exceptions: Paper products and books
2010 Olympic merchandise

Overview

- What kinds of Aboriginal-themed giftware are on display in the retail stores of Vancouver's major tourism sites?
- What are the various levels of Aboriginal participation for these products?
- Approximately what proportion of wholesale and retail prices go to Aboriginal individuals and companies?
- Suggestions from the field

Findings

Product groupings

- Fashion
e.g. clothing, accessories, jewellery
- Decorated utilitarian objects
e.g. kitchenware, home textiles
- Non-utilitarian decorations
e.g. carvings, dreamcatchers, inuksuit
- Miscellaneous small items
e.g. keychains, stickers, magnets
- Toys and dolls

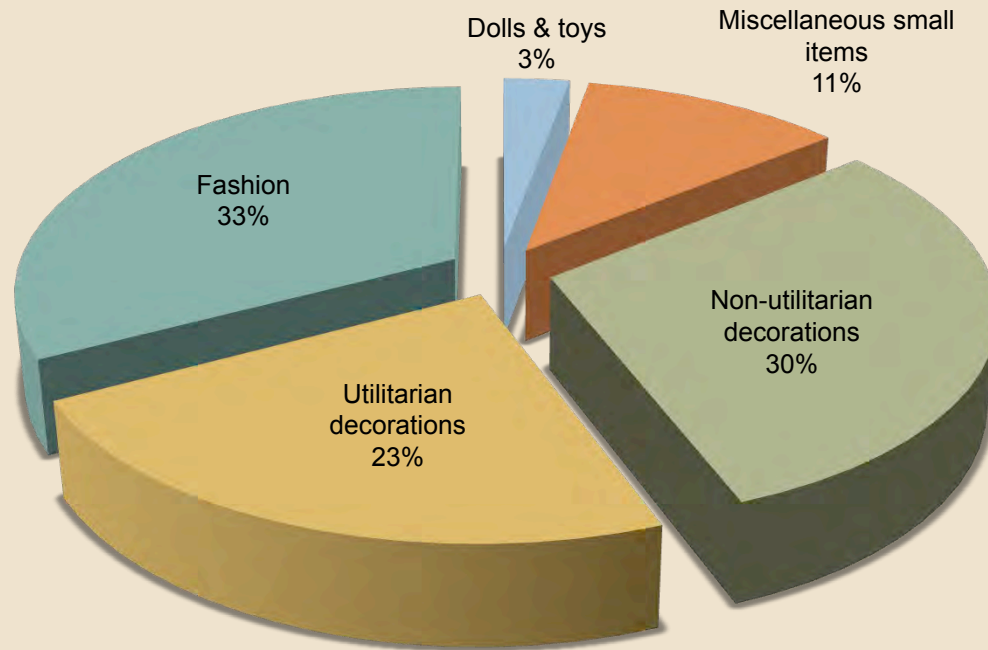
Categories

Individual artists
and Aboriginal-
owned companies

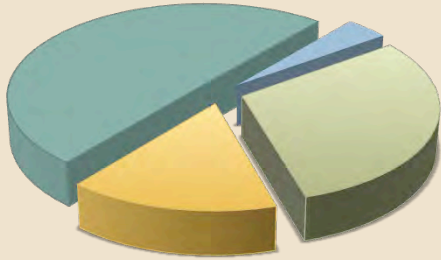
- **Category I: Maximum level of Aboriginal participation**
 - I-A: Individual artists
 - I-B: Companies
- **Category II: High level of Aboriginal participation**
 - II-A: Individual artists
 - II-B: Companies
- **Category III: Minimum level of Aboriginal participation**
 - III-A: Royalties
 - III-B: Flat Fees
 - III-Z: Mode of payment unknown
- **Category IV: No Aboriginal participation**
- **Category Y: Nothing indicates any Aboriginal participation**
- **Category Z: Level of Aboriginal participation not known**

Product groupings

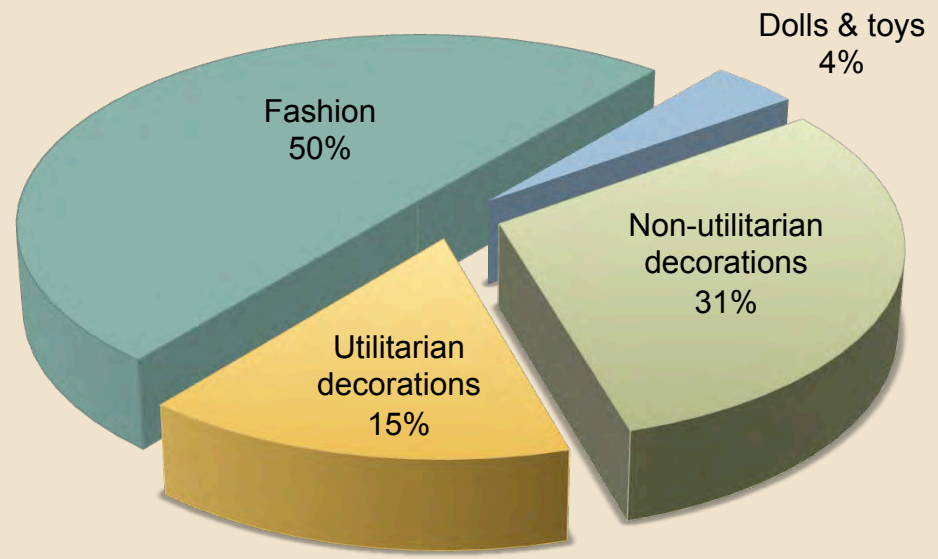
Product groupings overall



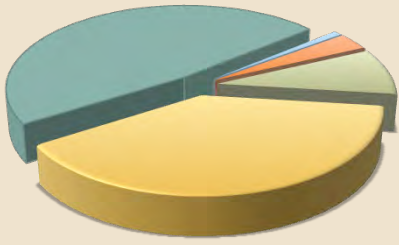
I + II: Aboriginal individuals and companies



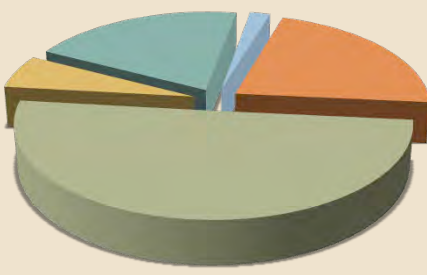
I + II: Aboriginal individuals and companies



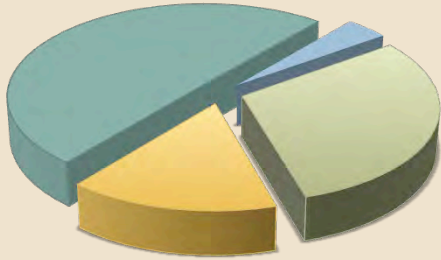
III: Minimum involvement



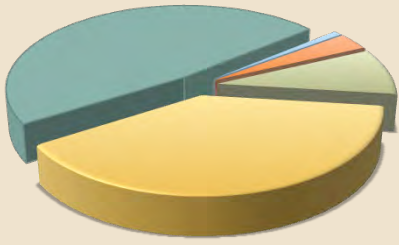
IV + Y: No involvement



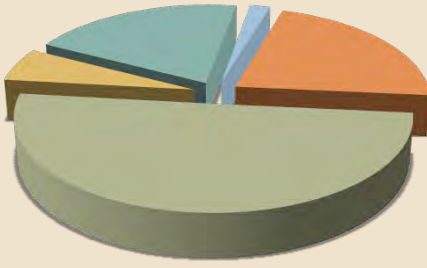
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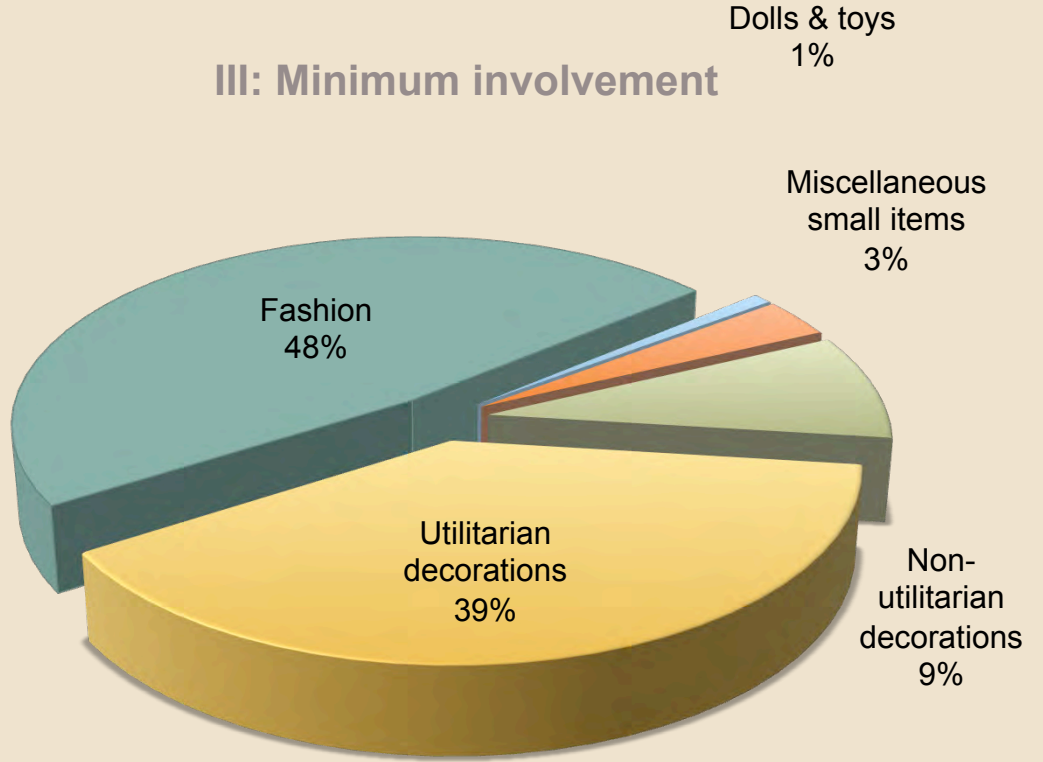
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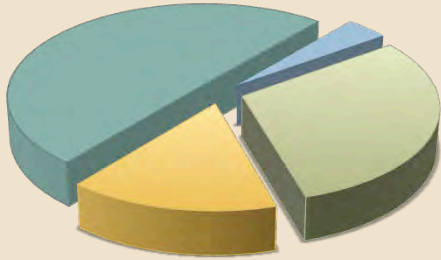
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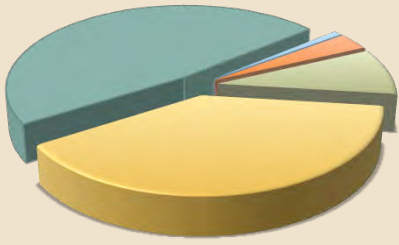
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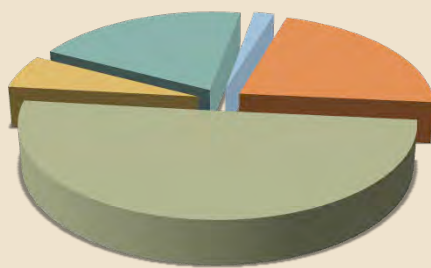
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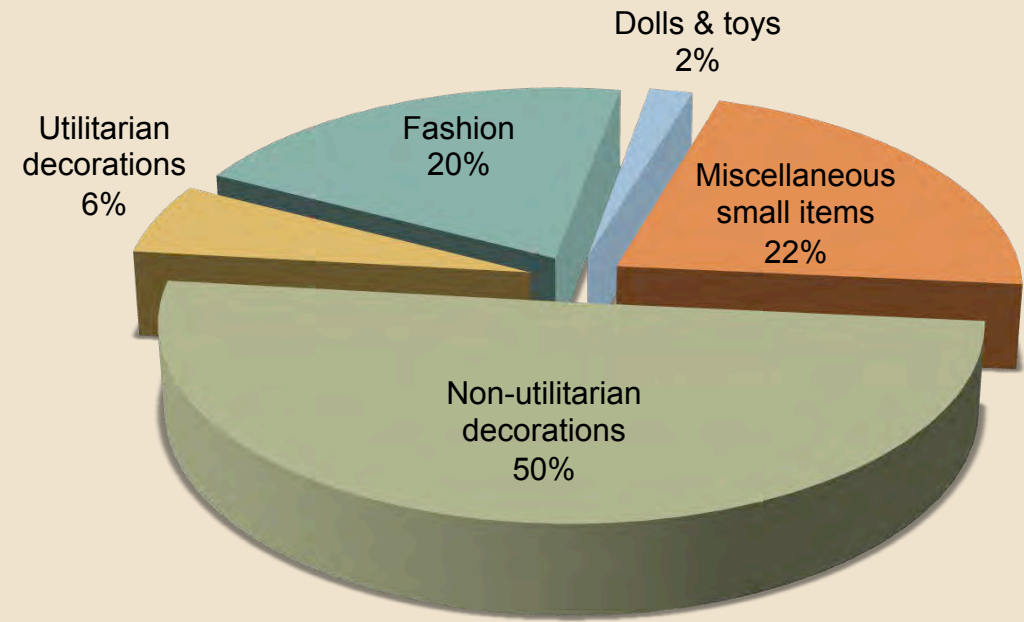
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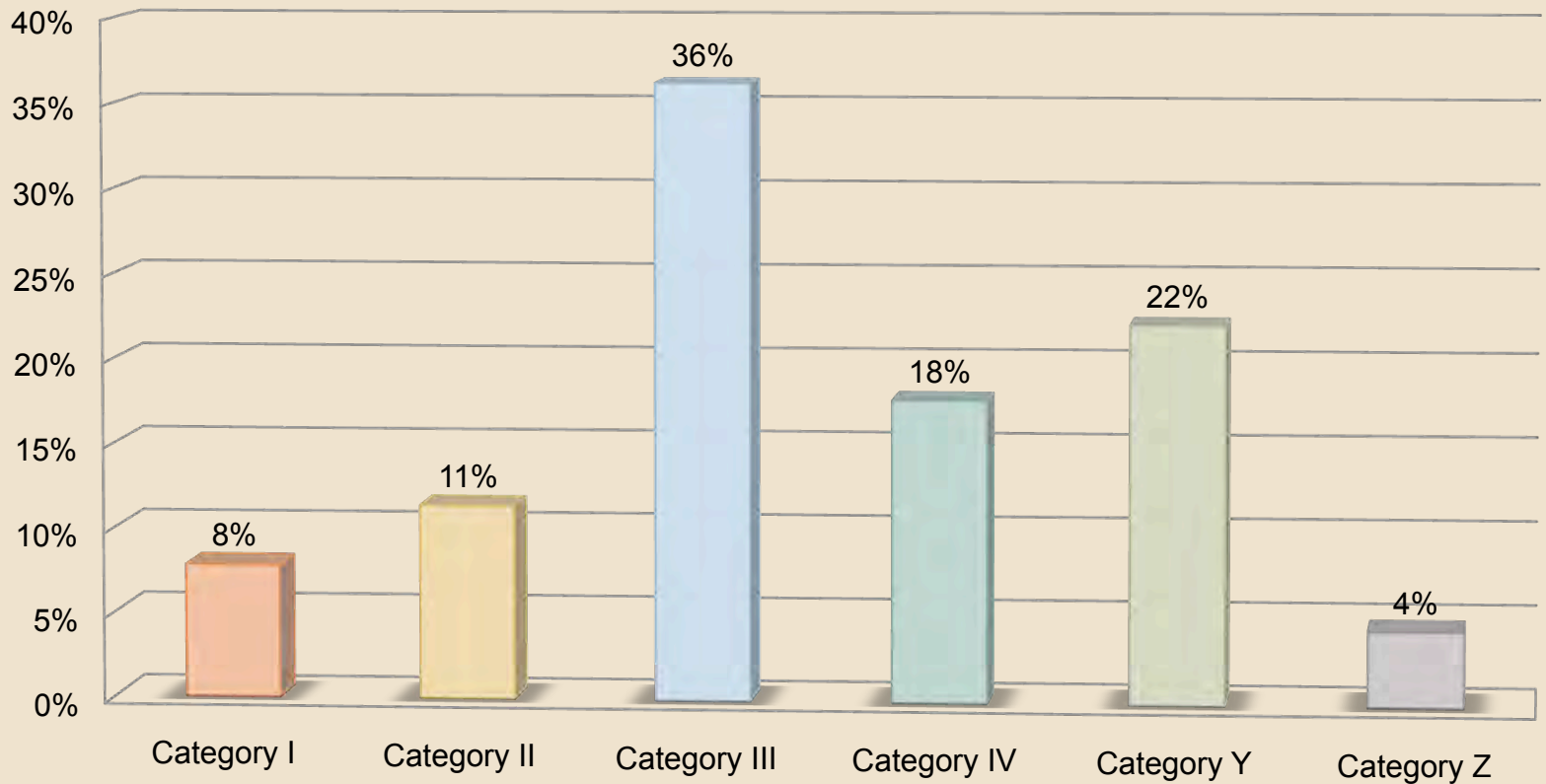


IV + Y: No involvement

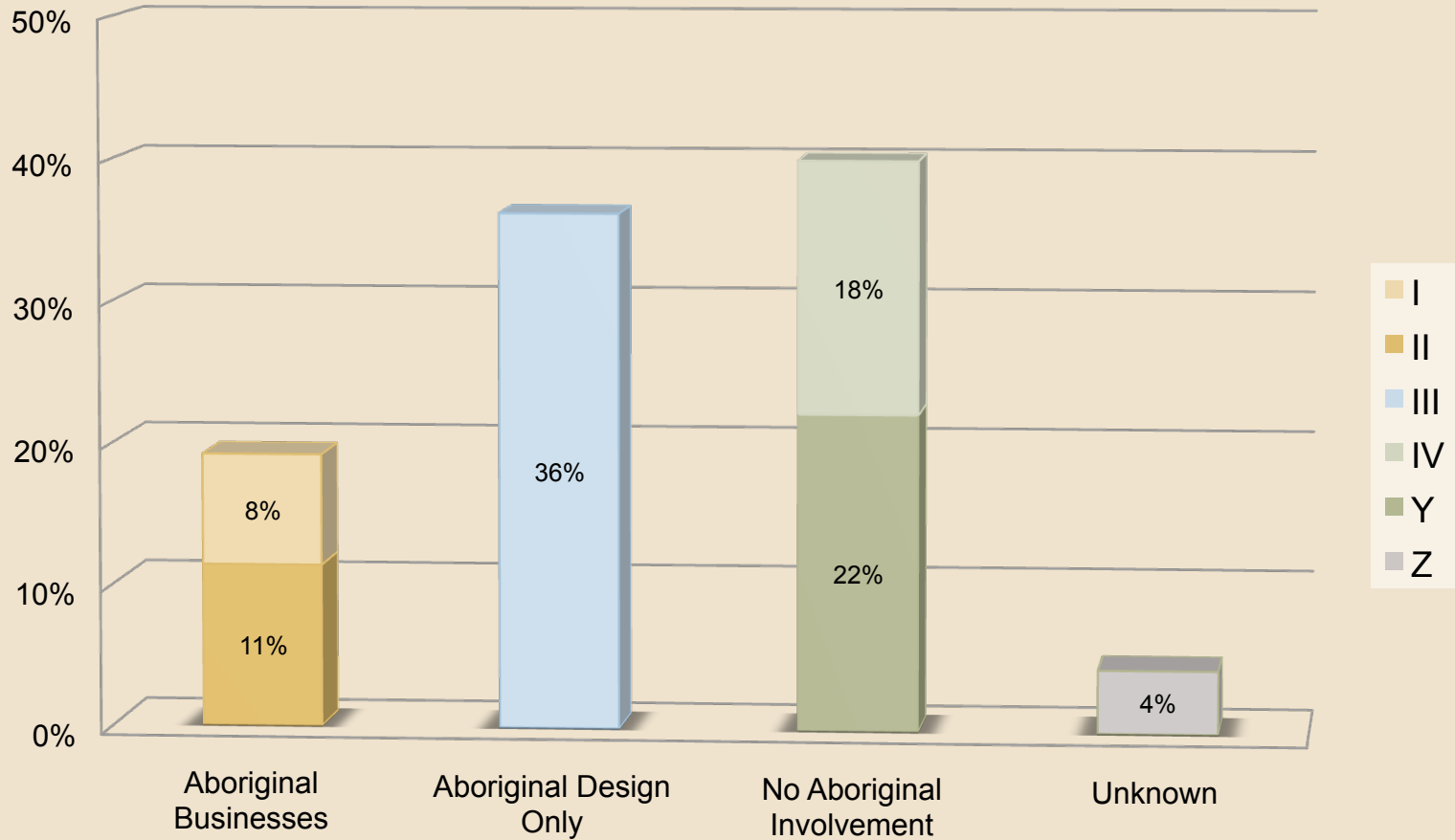


Share of display space per category

Overall share of display space by category

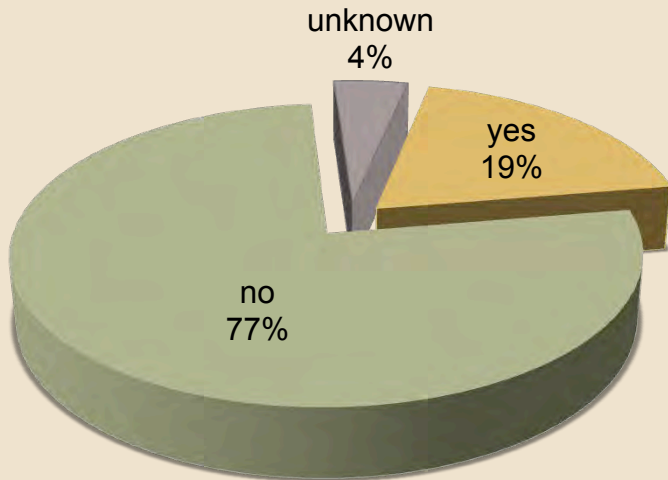


Aboriginal ownership and involvement

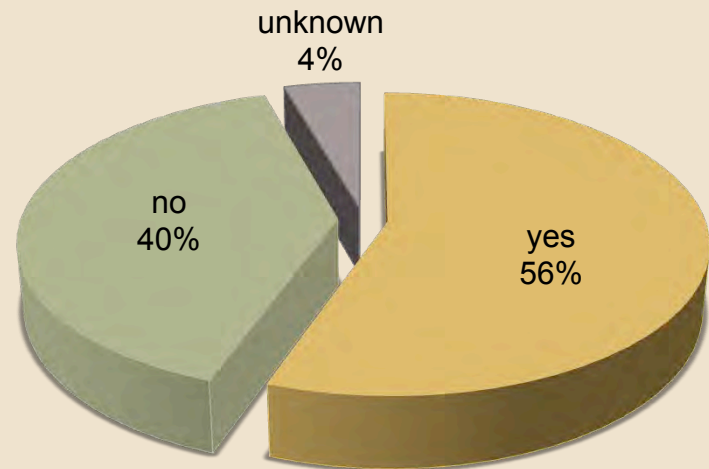


Share of display space per category

Aboriginal ownership



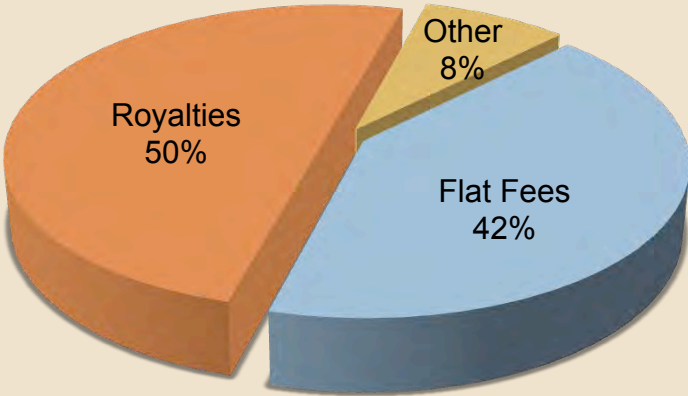
Aboriginal involvement



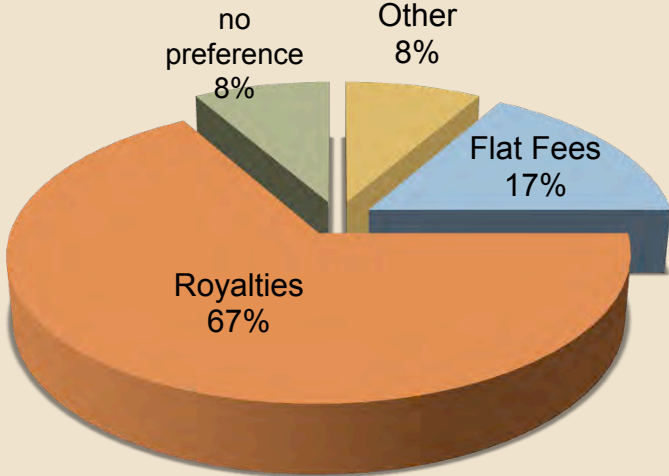
Share of display space per category

Mode of payment for design work

Mode of payment experienced by artists



Mode of payment preferred by artists



Retail stores

- Location
 - YVR Airport, ferry terminal, train and coach bus terminal
 - North shore, Gastown, Chinatown, Downtown, Granville Island, Stanley Park
- Size
 - small, medium, large
- Focus
 - High: most - if not all - objects are Aboriginal-themed
 - Medium: many - but not most - objects are Aboriginal-themed
 - Low: only a small portion of the objects are Aboriginal-themed

Retail stores

I + II: Products by Aboriginal artists and companies

Store focus	Share of display space
High	30%
Medium	13%
Low	12%

IV + Y: Products with no Aboriginal participation

Store focus	Share of display space
High	25%
Medium	45%
Low	55%

Revenue share

- Proportion of revenue going to Aboriginal businesses depends on:
 - Level of Aboriginal Participation
 - Cost of materials
 - Wholesale margin
 - Retail mark-up

Revenue share

- All products in display space, on average:
 - between $\approx 9\%$ and $\approx 18\%$ of wholesale price
(between $\approx 4\%$ and $\approx 8\%$ of retail price)
- Products occupying $\frac{3}{4}$ of the display space (Categories III, IV and Y), on average:
 - between 0% and $\approx 5\%$ of wholesale price
(between 0% and $\approx 1.5\%$ of retail price)

Remarks

- Labels

- Potentially confusing labels:

e.g. “made by native Canadians” (meaning individuals who were born in Canada)

“painted on an Indian reserve” (but not by Aboriginal individuals)

- Display

- What are the effects of having displays that mix the products of Aboriginal artists and companies with the products of companies that are not Aboriginal?

Highlights

Highlights: Products

- Aboriginal businesses (Category I and II):
 - Fashion
 - Decorative items
- Non-Aboriginal companies that work with artists (Category III):
 - Fashion
 - Decorated utilitarian items
- Companies with no Aboriginal participation (Categories IV and Y):
 - Decorative items
 - Small items

Highlights: Participation

- Aboriginal businesses: $\frac{1}{5}$ of display space
- Non-Aboriginal businesses: $\frac{3}{4}$ of display space
- When there is some Aboriginal participation (Categories I, II and III)
 - 60% of the time for design work only
- Stores that specialize in Aboriginal-themed giftware tend to be most supportive of Aboriginal artists and companies

Highlights: Revenue

- Revenue going to Aboriginal businesses varies greatly
- On average in major Vancouver tourism sites:
 - between 9% and 18% of the wholesale price
- On average for products occupying $\frac{3}{4}$ of the display space in major Vancouver tourism sites:
 - between 0% and 5% of the wholesale price

Suggestions from the field

- Establish standards for practices (e.g. minimum royalties)
- Providing other support for artists (e.g. business training)
- Raising awareness among retailers, businesses and consumers
- Finding ways to encourage non-Aboriginal companies to be more pro-active in hiring Aboriginal employees
- Thinking about ways to make more Aboriginal-owned companies more competitive in the market

Thank you!