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**Keewatin Destination Zone - Tourism
Development And Marketing Strategy -
Background Technical Data -Part II Tourism,
Tourism - Keewatin Region
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KEEWATIN DESTINATION ZONE

TOURISM DEVELOPMENT AND

MARKETING STRATEGY



Prepared for:

THE KEEWATIN CHAMBER OF COMMERCE

Prepared by:

MARSHALL **MACKLIN** MONAGHAN LIMITED

LUTRA ASSOC. LTD.

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This table is very misleading!
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this is all that we have!

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PART I - ACTION PLAN FOR TOURISM DEVELOPMENT IN KEEWATIN

1. INTRODUCTION

1.1 **The Keewatin Tourism Study Was Initiated
By The Keewatin Chamber of Commerce**

The Keewatin Region, lying at the geographic centre of Canada, is comprised of close to one half million square kilometres of tundra and coastal landscape. The seven permanent communities found in the Keewatin are home to approximately 10% of the Northwest Territories total population. The community residents are predominantly **Inuit**, many of whom still rely heavily on hunting and fishing for their livelihood. The present economic base in the Keewatin communities relies heavily on indigenous renewable resources, the arts and crafts industry and numerous small businesses. However, lack of employment, particularly for young people, is becoming an increasingly serious problem in the Keewatin communities.

For some time now the Government of the Northwest Territories **and** the local business community have recognized the relatively undeveloped potential that the tourism industry offers to the economy "of the Keewatin Region.

In an effort to identify the potential for tourism development in the Keewatin Region and outline an action strategy **for** tourism development, the Keewatin Chamber of Commerce initiated the Keewatin Destination Zone; Tourism Development and Marketing Strategy study. In March, 1984, the consulting firm Marshall **Macklin** Monaghan Limited was hired to undertake the study.

This Keewatin Tourism Study was funded under the Economic Development Agreement for the Northwest Territories and was directed by a Steering Committee composed of representatives from the Keewatin Chamber of Commerce (Chairman), the **Keewatin** Regional Council, the Keewatin **Inuit** Association and the Keewatin Wildlife Federation.

1.2 The Main Objective of the Study is to Define A Strategy For Future Tourism Development

The major objective of the Keewatin Tourism Study is to identify and evaluate the tourism potential in the region, assess the market opportunities for Keewatin tourism products and define a tourism strategy to guide tourism development throughout the region and in the individual communities.

The more specific objectives of the study are as follows:

- i) to increase the awareness of Keewatin residents regarding tourism and the nature of the tourism industry as well as the opportunities for their involvement in the tourism industry;
- ii) to assess the tourism opportunities and constraints in the communities and surrounding areas;
- iii) to describe the existing and potential markets;
- iv) to define a tourism development and marketing strategy for the region which identifies roles and opportunities for each community;
- v) to develop an implementation program (action plan) to direct the implementation of the regional **strategy** and the individual community plans; and
- vi) to assess the possible costs and benefits that would result from the implementation of the development and marketing strategies.

The overall intent is to develop an action oriented tourism development program or strategy which will provide:

- i) a means to maximize the region's tourism potential;
- ii) a guide for desirable tourism development for **both** the private and public sector; and
- iii) useful background information for investors, community residents and other interested groups.

1.3 The Study Approach Was Divided Into A Number of Distinct Products

In order to ensure that each of the study objectives are met, the work program was divided up into a number of distinct tasks or products. Each product consisted of a number of sub-tasks intended to identify individual work tasks involved in the study and their order of progression.

The eleven products or tasks are summarized below and the integration of the products is schematically illustrated in the following Figure 1.1- Framework for Preparation of a Keewatin Tourism Strategy.

Task 1: Startup Workshop and Background Data

The products of this task were as follows:

- o a clear understanding with respect to client and consultant responsibilities and participation throughout the study process; and
- o development of a “partner” working relationship with the Steering Committee.

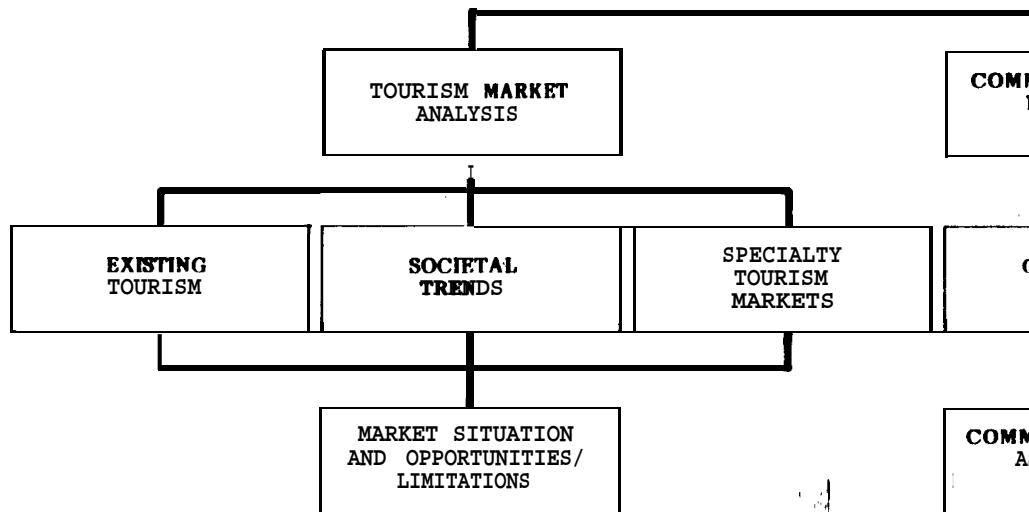
Task 2: Funding Programs and Policy Framework

The intent of this task was to:

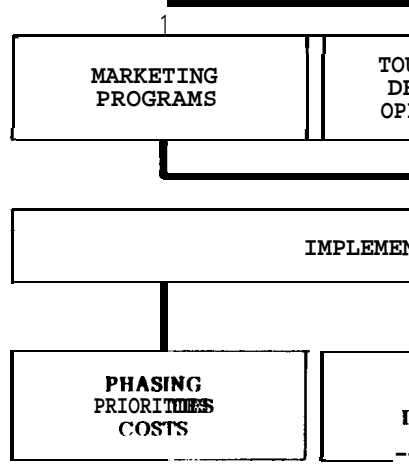
- o develop a clear understanding respecting the policy framework within which planning will take place; and
- o development of a working knowledge respecting criteria and directions of current funding programs.

Task 3: Community Awareness/Involvement Program

This task detailed a community involvement program designed to ensure credible and informed input from the community while creating an awareness of the benefits of well-planned, community-based tourism development.



- o NEEDS APPROVAL
- o TEST OPPORTUNITIES



Task4: Educational/Training Activities of the Study

The intent of this task was to work with, and thereby train, individuals in each community in the tourism planning and development process.

Task 5: Evaluation of Regional/Community Tourism Resources and Assessment of Product Strengths and Weaknesses.

The products from this task were a detailed assessment of the strengths and weaknesses of community and hinterland related opportunities and identification of potential products for each of the primary seasons in light of physical constraints and existing services.

Task 6: Analysis of Target Market Product Requirements and Expectations

The intent of this task was to document the characteristics and volume of existing tourism visitation to the Keewatin region and to determine the growth, trends and expectations of new target markets which may be attracted to the region.

Task 7: Analysis and Application of Successful Promotion Strategies/Techniques

The product from this task was an **inventory** and evaluation of current, innovative marketing/promotional techniques applicable to the Keewatin region.

Task 8: Preparation of Regional and Community Development/Marketing Strategies.

This task resulted in the preparation of distinct regional and community tourism development and marketing strategies reflecting community aspirations, resource opportunities as well as community/operator ability to implement and control developments.

Task 9: Action Program for Implementation

For each community and the region as a whole an implementation program was developed outlining what development should take place, how much it will cost, who is responsible and when.

Task 10: Regional Marketing Strategy

The intent of this task was to prepare an overall marketing strategy to facilitate the effective promotion of the Keewatin tourism products to the identified target markets.

Task 11: Economic Benefits of the Plan

A definition of the overall economic benefits of tourism as well as a clear indication of the relative importance of tourism in creating employment and enterprise in the region.

1.4 This Report is Divided Into Two Parts ---

Part One - Chapters 1-8 inclusive - presents the components of the Tourism Development Strategy and Action Plan for Implementation.

Part Two - Chapters 1-4 - provides background analyses related to tourism resources, community involvement and markets. Part Two should be regarded as a support document providing the context for the plan proper presented in Part One.

1.5 Regional Overview

The Keewatin Region represents one--of the five Territorial Government administrative districts. Bounded on the west by the District of Mackenzie, the Keewatin Region lies almost entirely between the Arctic Circle to the north and the treeline to the south, and to the east forms the western shore of Hudson Bay. The region is comprised of approximately 592000 km² representing close to 18% of the Northwest Territories land-base. It is also of interest to note that the Keewatin Region lies at the geographical centre of Canada.

The seven communities which comprise the Keewatin Region are indicated on Drawing **No.1**. These seven communities are home for approximately 4327 people (1981 Census) of which approximately 86% are **Inuit**. This total population represents close to 10% of the Territorial population.

	BAKER LAKE	CHESTERFIELD INLET	CORAL HARBOUR	ESKIMO POINT	RANKIN INLET	REPULSE BAY	WHALE COVE	BARREN LANDS
THEME								
PRE-CONTACT HISTORY	0	○		○	●	○		
POST-CONTACT HISTORY	●			○				
SEARCH FOR THE NORTHWEST PASSAGE		○			●			
WHALING ERA		○			●	●		
FUR TRADE ERA		○		○		●	1 0 1	
MISSIONARY ERA		●						
POLICING THE NORTH		●						
EXPLORATION	○							
MINING				○	●			
BARREN LANDS/ ARCTIC LANDSCAPE	0			●		●		?
ARTS/CULTURE	●			●	1 0		○	
WILDLIFE	○		●	○		●		
WATERWAYS	●			○				
FISHING	●	○			○			
SERVICE								
GATEWAY/SERVICE COMMUNITIES	II				○			N/A
THEME COMMUNITIES	0	○	○	○		○	○	
FISHING	●			●	●			
HUNTING	●	●	●			●		
REMOTE LODGE						●		
PHOTO SAFARI			●			●		
ADVENTURE			●			●		
SHORT-TERM FLY-M	●	○		●	●		○	
ARTS/CULTURE	●			●	●	●	●	
GENERAL INTEREST	●	●		●	●	●		
SEASON								
WINTER			○		○	○		
SPRING	○	○	○	●	●	○		
SUMMER	●	●	●	1 0	●	●	○	
FALL				○	○	●		

SCALE ● MODERATE OPPORTUNITY/ASSOCIATION
○ HIGH OPPORTUNITY/ASSOCIATION

COMMUNITY ACTIVITY EVALUATION SUMMARY

TABLE

ACTIVITY	BAKER LAKE	CHESTERFIELD INLET	CORAL HARBOUR	ESKIMO POINT	RANKIN INLET	REPULSE BAY	WHALE COVE	BARREN LANDS
WILDLIFE VIEWING	●	0	●	○	0	●	○	0
SCENIC VIEWING	●	○	●	○	●	●	0	0
INTERPRETATION OF NATURAL FEATURES	●	○	●	0	●	●	○	0
VIEWING/INTERPRETING HISTORIC/ARCHAEOLOGICAL SITES	●	●	○	●	●	●	○	0
BIRD WATCHING	●	○	●	●	○	0	0	0
ROCK HOUNDING	●	○	○	○	●	○	0	0
BACKPACKING	●	0	●	0	●	●	0	0
CANOE TRIPPING	●	○	○	●	○	○	0	●
WHITE WATER KAYAKING/RAFTING	●	N/A	○	0	0	0	0	0
DOG SLEDDING	●	○	○	●	○	●	0	N/A
ICE FISHING	●	●	●	●	●	●	●	●
OPEN WATER FISHING	●	●	○	0	●	○	0	●
LEARN-OBSERVE-EXPERIENCE	●	●	●	●	●	●	●	N/A
CROSSCOUNTRY SKIING	0	0	○	○	●	●	0	0
BOAT TOURS	●	●	○	●	●	●	●	○
AMATEUR BOTANY	●	●	●	●	●	●	●	●
BEACHCOMBING	●	○	●	○	0	0	0	N/A
BIG GAME HUNTING	●	●	●	○	○	●	○	○
WATERFOWL HUNTING	●	●	○	●	●	○	●	●

REGIONAL SCALE

- HIGH ACTIVITY OPPORTUNITIES
- ◐ MEDIUM ACTIVITY OPPORTUNITIES
- LOW ACTIVITY OPPORTUNITIES
- NOT APPLICABLE

PART II
BACKGROUND TECHNICAL DATA

1.0 TOURISM DEVELOPMENT POLICY FRAMEWORK

1.1 Introduction

The tourism industry is a multi-faceted industry which affects **or is** affectedly practically every facet which makes up the **socio-economic** fabric in the Northwest Territories. Accordingly the industry is very much influenced by both federal and territorial policies and programs emanating from a multitude of government agencies, boards and commissions.

A tourism strategy to be effective must, during the formulation stage, be cognitive of public sector objectives and current programs as well as the private sector objectives and capabilities. The development of a Keewatin tourism strategy must, to the extent possible, recognize these objectives and realistically, work within their intent. This is not to suggest the stifling of activity for tourism strategy development; certain changes must occur. It does, however, recognize that a great many agencies have a secondary impact on tourism development in the Keewatin and may be unwilling to change current policy or **programs from** concern of detracting **from** their primary mandates.

----- "..." awkward

The **following** chapter provides an overview of all relevant government (federal, territorial) and private sector agencies along with relevant policies and programs that may affect the tourism industry.

1.2 Roles and Responsibilities of Relevant Government Agencies

Before 1867 Canada's north was administered by the Hudson's Bay Company in an area referred to as **Rupert's** land. In 1868 the Hudson's Bay Company surrendered **Rupert's** land to Britain. In 1870 the Northwestern Territory of Canada (including western Quebec, Northern Ontario, Manitoba, Saskatchewan, Alberta, Yukon and most of the Northwest Territories) was admitted to the Dominion of Canada (the high arctic areas were not transferred until 1880).

Prior to the formation of the **N.W.T.** government the federal government administered all levels of government in the Northwestern Territory. By 1912 the **N.W.T.** was reduced in size to its present shape with the rest of the lands going to the relevant Provinces and the Yukon Territory. At that period in time, the Territorial government was conceived and has evolved into its present form

consisting of a Commissioner (reporting to the federal Department of Indian and Northern Affairs), a Territorial Council, and an Executive Council with each member responsible for a department/agency representing the major activities and concerns of the Territorial Government. However since the Northwest Territories does not have Provincial status the federal government is still responsible for the administration of the following components:

- o control over most land (except Commissioners lands);
- o non-renewable resources with the exception of game;
- o **labour** relations; and
- o certain aspects of criminal law.

The following sections describe the relevant federal and provincial agencies which have a bearing on tourism development in the **N.W.T.**

1.2.1- Federal Government Agencies

i) Indian and Northern Affairs Canada

Within the federal government the Department of Indian and Northern Affairs has been given the responsibility for Canada's Indian and Inuit people and for natural resource management in the Yukon and N. W. T. Within the department there are three main programs that have particular relevance to the **N.W.T.** as follows: -

1) Northern Affairs

The major objectives of this program are:

to advance northern social, economic and political development in conjunction with the territorial government.

to develop strategies for federal/territorial relations.

to administer a program of northern native social and cultural development.

to develop policies and programs for the development and management of non-renewable and renewable resource sectors (except wildlife).

to administer Crown land (a new land-use planning system implemented in the early 1980's allows for land use responsibility to be shared with the G. N.W.T. Department of Renewable Resources).

2) Indian and Inuit Affairs

The mandate of this program is to assist the **Inuit** in achieving their cultural, social and economic goals.

3) Office of Native Claims

This program provides for the negotiations of land claims and development of a claims policy.

ii) Industry, Trade and Commerce and Regional Economic Expansion

Within this federal department the two most relevant agencies with respect to tourism development in the north are the Department of Regional and Industrial Expansion (D. R. I.E.) and Tourism Canada.

D. R.I.E. develops and co-ordinates programs designed to stimulate industrial activity and overcome regional economic ~~d~~isparities throughout the country. The Northwest Territories is a priority disadvantaged area for D. R.I.E. Funding programs offered under D. R.I.E. (to be discussed later in this chapter) include the Economic Development Agreement, the Industrial Rural Development Program and Special A. R.D.A.

Tourism Canada is charged with the mandate to sustain orderly growth of tourism in Canada. With Tourism Canada, the following programs have certain relevance to tourism development in the N. W .T.

Tourism development in ~~Canada~~: to ~~help~~^I plan and develop Canada's tourist industry, stimulate private sector investment, assist in the form of information and publications for the private sector on productivity improvement and the upgrading of facilities and services.

Tourism information in Canada: ~~dis~~^Sminates Canadian tourist information.

Tourism, travel/media assistance: through this program media researchers, writers, broadcasters, photographers and lecturers are invited to sample travel destinations to inform their public of Canada's tourism events and attractions.

iii) Environment Canada

The responsibilities of Environment Canada include the management and promotion of forest resources and migratory birds; the provision of information on climate; the protection and enhancement of the quality of the natural environment; and the conservation of renewable water, land and wildlife. From a tourism development perspective the two most relevant agencies in ~~Environm~~^Sent Canada are Parks Canada and the Historic Sites and Monument^A Board of Canada.

Parks Canada is responsible for evaluating the geographical regions of Canada and identifying potential historic sites and parks, heritage rivers and national parks. Once developed Parks Canada is responsible for the management of the parks and sites. Within the Keewatin Region, Parks Canada has identified two "Natural Areas of Canadian Significance" (Wager Bay and northern Southampton Island) which will be considered for future national park development.

The Historic Sites and Monuments Board of Canada acts as an advisor for historical matters to the Minister of the Environment, whose responsibility y it is to implement a program of commemorating historic sites of national significance. At the present time, three Keewatin Region explorers (James Ross, Sir John Ross, George Back) are being considered for ~~commem~~⁷oration, however no specific sites have been identified.

iv) National Museums of Canada

The mandate of the National Museums of Canada is to demonstrate the products of nature and the works of man with special, but not exclusive, reference to Canada. Within the National Museums of Canada the Canadian Conservation Institute helps publicly-owned museums, galleries, and archives to protect their collections against deterioration.

Another program referred to as the Museums Assistance Program provides financial and technical assistance to qualifying public museums, art galleries and other related institutions; to increase access to Canada's cultural heritage and to ensure the preservation of that heritage.

1.2.2- Territorial Government Agencies

In the past, the major interface between the federal and territorial governments has been through the Crown commissioner of the **N.W.T.** who reports to the Minister of Indian Affairs and Northern Development. However, in the recent past there has been an increasing **devolution** of responsibilities from the Crown commissioner's office to the elected ministers sitting on the Executive Council. At present **all** the territorial departments are under the responsibility of the ministers with the exception of the Department of Personnel. The Executive Council has evolved as the senior decision-making body in the territorial government. Members of the Council are collectively responsible for decisions on policy and programs, for relations with the federal government and for the general conduct of government.

At the present time there are 24 territorial electoral boundaries in the **N.W.T.** each providing an elected representative to sit in the Legislative Assembly. Eight of the territorial **MLA's** plus the Commissioner are appointed to sit on the Executive Council as Ministers. Each Minister is individually responsible for the policy and programs within their assigned departments or agencies.

The following provides a short description of the government departments and their mandates that have a particular relevance to the **N. W.T.** tourism industry.

i) Department of Economic Development and Tourism

This department is charged with the development of economic opportunities in the N. W. T., tourism development and the equitable distribution of the resulting economic benefits to the residents throughout the **N.W.T.**

The major divisions in the department along with their responsibilities are as follows:

Planning and Resource Development - with responsibility for economic planning and economic and **policy/program** analysis for the department.

Commerce - responsible for advocating development in the small business section and supporting entrepreneurial activities.

Tourism and Parks - assist with the development of tourism programs and associations and promotes tourism in the **N.W.T.**

ii) Department of Education

The relevant division within the Department of Education, from a tourism perspective is the Manpower Development Division. This division is responsible for providing **programs** and information on employment, industrial training, apprenticeship and related support programs for Northerners in business and industry.

iii) Department of Renewable Resources

The mandate of the Department of Renewable Resources is to ensure that the option of lifestyles based on renewable resources is maintained for future generations.

For administrative purposes **the N.W.T.** has been divided into five regions of which the Keewatin is one. Rankin Inlet is the regional headquarters for the Keewatin Region.

At some time in the future it is likely **that** the **N.W.T.** will be divided into two separate territories (to evolve into two provinces). In 1979 the **Inuit** Tapirisat Council proposed that the area north of the treeline come under its own **self-**government and become known as **Nunavut**. The idea to divide the **N.W.T.** has been endorsed by the Territorial Legislative Assembly and a public plebiscite resulted in a majority of yes votes in favour of division. At the present time the federal government has given agreement in principle with the idea.

The **Nunavut** Constitutional Forum has been assigned the responsibility for drafting a **Nunavut** Act and negotiating a boundary.

1.2.3- Municipal Government

At the municipal government level the **N.W.T.** Municipal Ordinance provides for a number of different levels of local government. All the communities in the Keewatin Region have reached Hamlet status which allows them to set their own budgets within certain guidelines set by the Territorial government. Hamlet revenues consist of an operating grant, community service charges, permits, licenses, fines and fees (no **tax base**). Each Hamlet has an elected Mayor and seven **councillors**.

Each of the Mayors in the Keewatin Region sit on the Keewatin Regional Council which acts as an advisory body to the Territorial government.

1.3 Roles and Responsibilities of Major **Inuit** Organizations

This section briefly outlines the mandates and responsibilities of major **Inuit** organizations which have some degree of control over development or which operate programs relevant to the development of tourism in the Keewatin Region.

i) **Inuit** Tapirisat of Canada

Inuit Tapirisat of Canada (**I.T.C.**) is the national association representing the **Inuit** of Canada. **I.T.C.** represents six regional affiliates including four in the **N.W.T.** - the Keewatin Region **Inuit** Association, the Baffin Region **Inuit** Association, the Kitikimeot **Inuit** Association and the Committee for Original People's Entitlement; and two in Quebec and Labrador - the

Makivik Corporation and the Labrador Inuit Association^{respectively} The president of each of these regional affiliates comprises the **I.T.C. board** of directors, along with four other elected members.

The mandate for **I.T.C.** is to provide a unified voice for the residents of the **N.W.T.** on issues such as development of the north, preservation of the **Inuit** culture, land claims, constitutional development, and the pursuit of self-government through the **Nunavut** proposal.

I.T.C. affiliated agencies include:

- i) **Inuit Broadcasting Corporation** - responsible for communications.
- ii) **Nunasi Corporation** - responsible for economic development.
- iii) **Tungavik Federation of Nunavut** - responsible for land claims negotiations.
- iv) **Inuit Committee on National Issues** - represents **Inuit** views on the Canadian constitution.

I.T.C. also has two seats on the Nunavut Constitutional Forum.

- ii) **Inuit Cultural Institute**

Beginning as a project of the **Inuit Tapirisat**, the **Inuit Cultural Institute (I.C.I.)** in Eskimo point is now an **autonomous** affiliate funded through the Northern Affairs Cultural Education Centre Programs.

I.C.I. has been identified by **I.T.C.** and other **Inuit** organizations as the agency with prime responsibility for education, language, culture and history in the north.

- iii) **Arctic Co-operatives Limited**

This organization is an amalgamation of the Canadian Arctic Co-operative Federation Limited (C. A. C. F. L.) and the Canadian Arctic Producers Co-operative Limited (C. A. P.). Incorporated under the Co-operative Association Ordinance the C. A. C. F. L. consists of 37 **Inuit** and Indian co-operatives in the Northwest Territories. The C. A. C. F. L. provides

marketing and purchasing services for its member **co-ops**, conducts education and training programs and represents the **co-ops** to outside groups and governments.

The Canadian Arctic Producers Co-operative Limited is the major marketing agency for the sale of **Inuit** craft items made in the Northwest Territories to wholesalers in the south. However the co-operative is not the sole marketing agency for **Inuit** arts and crafts due to competition from the Hudson's Bay Company, Cape **Dorset** Fine Arts and private buyers.

1.4 Roles and Responsibilities of Major Private Sector Organizations

Within the Keewatin Region, there is a small but active private sector business community. The private sector business sector is small in comparison to a predominance of government agencies. In addition to the government, the three most active industries in the Keewatin Region include an undeveloped tourism industry, a small construction industry and a relatively small mining industry.

Early on, the private business community recognized the problems associated with the predominance of government agencies and funding. In this type of a situation where the government is the major "industry", it becomes critical that the government be understanding and sensitive to the local business sector. In order to express their concerns and create an awareness in the government with respect to the difficulties -faced by the private business sector, local business in the Keewatin Region grouped together and formed the Keewatin Chamber of Commerce. In addition, two of the larger communities, Eskimo Point and Baker Lake have also formed local Chambers of Commerce to help promote better communication between local businesses and government.

The following section provides a brief summary of the goals and objectives of each of these organizations.

- i) Keewatin Chamber of Commerce

Mandate to be added.

ii) Baker Lake Chamber of Commerce

This chamber was formed in 1984 with a mandate to:

- o develop, encourage and assist any programs which will assist in the well-being of the community
- o to promote and improve the business, economic, social and cultural interests of Baker Lake

iii) Eskimo Point

Mandate to be added.

1.5 Jurisdictional Controls

The following section provides a brief summary of relevant legislation which may affect tourism development in the Keewatin Region.

1.5.1- Land Use Ordinances

Land in the Northwest Territories comes under both federal and territorial administration and ultimately under the jurisdiction of the federal government. Up until 1954, all aspects of land use came under the control of the federal government.

Since 1954, the federal government has given certain lands to the territorial government for certain limited purposes. These are for the most part lands that fall in and around settled communities. Lands that fall under territorial administration are referred to as Commissioner's lands. These lands are under the administration of the territories, not complete control, and are subject to specific mineral, water and shoreline reservations as stipulated by the federal government. Thus, the territorial government has the right to administer surface uses only on lands given them by the federal government.

The authority to legislate (not dispose) lands in the Northwest Territories comes under the territorial ordinances and regulations whether the land is territorial, federal or private.

The following territorial ordinances and federal regulations have a particular **relevance** to the tourism industry.

i) Travel and Tourism Ordinance

This ordinance gives the power to the Commissioner to regulate the use and development of any recreational area by designating it a "travel development area" or a "**travel** restricted area". A "travel development area" would require any tourist establish ent therein to have a permit for construction and a license for operation. A "travel restricted **area**" would be an area of restricted public use where no one other than a resident would be allowed to enter for recreational purposes without a permit and a guide.

ii) Historic Resources Ordinance

Through this ordinance, the Commissioner has the power to acquire and set aside historic places and lands and to provide for their administration. Furthermore, this ordinance provides the Commissioner with the power to order adequate investigation, recording and salvage of historic or archaeological artifacts during mining, exploration or industrial operations.

iii) Territorial Parks Ordinance

This ordinance empowers the Commissioner to establish and set aside land for parks purposes. This includes the establishment of Environment Recreation Parks, Outdoor Recreation Parks, Community Parks and Wayside Parks.

iv) Migratory Bird Sanctuary Regulations

At the present time, three bird sanctuaries have been designated in the Keewatin Region to help protect nesting areas for significant migratory bird populations (Harry Gibbons and East Bay on Southampton Island and McConnell River south of Eskimo point). The Migratory Bird **Sanctuary** Regulations administered by the Federal Department of the Environment provide regulations to restrict visitation to and use of the designated sanctuaries.

v) Wildlife Ordinance

This ordinance allows the Commissioner of the **N.W.T.** to set aside special areas and make special laws to protect wildlife.

1.5.2- Licensing

Licensing is an extremely important component of the tourism industry both in terms of assuming a basic level of management capability and facility quality, but also in terms of ensuring visitor safety and to regulate use of certain limited resources. The following licensing programs demonstrate some of the regulatory controls exercised by both the territorial and federal governments over tourism development in the **N.W.T.**

i) Outfitters Regulations

These regulations administered by the territorial government, provide for the licensing of individuals proposing to run an outfitting business. An outfitter's license authorizes the holder to provide equipment or transportation, guide and related services to the general public. The outfitting services would be offered in conjunction with some type of outdoor recreational activity such as angling, hunting, boating or camping.

ii) Travel and Tourism Ordinance

This territorial ordinance provides for the licensing of anyone intending to run a tourist establishment or outfitting business. A tourist establishment is defined as any sleeping accommodation facility (including boats where applicable), campsite or picnic area catering to the traveling public.

iii) Guide Exemption Regulations

These regulations allow a guide to work without a license. A guide is defined as "a person who, for gain or reward, accompanies or assists another person in any outdoor recreational activity".

iv) Tourist Establishment Regulations

These territorial administered regulations provide for the regulation of constructing, moving or altering tourist establishments.

v) Sportfishing and Hunting Regulations

Within the Keewatin Region, sport fishing and hunting activities are regulated by the Federal Department of Fisheries and Oceans (fishing and hunting sea mammals), the Federal Department of the Environment (migratory bird hunting) and the Territorial Department of Renewable Resources (hunting of wildlife **including** polar bear, muskox, caribou, wolf and small game).

Sport fishing is regulated by daily catch restrictions and no seasonal restrictions.

Seals are the only marine mammal at present that can be hunted by non-residents. Regulations include a catch restriction and the requirement to use an **Inuit** outfitter.

Sport hunting in the **N.W.T.** is regulated by commercial quotas, bag limits and hunting seasons. Big game hunting opportunities in the Keewatin Region include barren ground caribou (there is a commercial quota in Repulse Bay), polar bear (each community has a quota which can be used for non-resident hunters) and muskox. The hunting seasons are as follows:

- o polar bear - December 1- May 31
- o muskox - October 1- March 31
- o caribou - August 15- October 31

Migratory bird hunting is regulated by bag limits and seasons. In the Keewatin Region, the bird hunting season runs from September 1 - December 10.

1.6 Tourism Policy Context

In 1983, the Government of the Northwest Territories developed a comprehensive strategy for tourism development in the N. W .T. entitled "Community Based Tourism; A Strategy for the Northwest Territories Tourism Industry".

The intent in developing the strategy was to provide direction for the government, over a five year planning horizon, in the development and marketing of the tourism industry. The emphasis of the strategy was placed on increasing the economic benefits from tourism development to local residents.

In developing this new development and marketing strategy, the Government of the Northwest Territories recognized the faults in their past approach of supporting and encouraging the wilderness type sport fishing lodges instead of developing opportunities in and out of the communities.

The following goals and principles were identified in the Government's tourism strategy:

- 1) The degree of government interest and strength of government support for the tourism sector will be directly dependent upon the extent to which tourism can contribute to one of the basic goals of the Government of the Northwest Territories: to develop the N.W.T. economy in a manner compatible with N. W .T. lifestyles and aspirations.
- 2) Before the Government of the Northwest Territories can provide support for the tourism sector, there must be a broad-based concensus on a direction or future for tourism and concensus concerning respective roles of government and industry in achieving that future.
- 3) The Governmentts aim is to assist communities right across the N.W.T. in defining and then achieving their tourism revenue and employment objectives. Tourism opportunities and benefits should be wide spread throughout the N.W.T.
- 4) The Government believes that encouraging and supporting community based tourism is the most appropriate means for accomplishing their goals.

- 5) The Government will advise and assist community councils and businesses, on their request, in the development and promotion of community based tourism endeavors.
- 6) Government will encourage and facilitate community based tourism developments which are saleable in the marketplace, potentially profitable, are in keeping with the host' com munit y's aspiration, and adhere to the following key principles:
 - o Tourism development should be promoted and initiated only in those communi ties that are interested.
 - o Tourism should primarily be a private sector industry.
 - o In the medium and long term, N.W.T. businesses should become self supporting.
 - o Emphasis will be on small manageable volumes of visitors at one time, in one location.

These six principles and goals formed the basis for the development of a comprehensive Community Based Tourism Strategy for the Northwest Territories. The following list provides an outline of the proposed programs comprising both the tourism development and marketing strategies.

Most of the new programs identified in the strategy are designed for delivery by the travel associations, tourism businesses and communities. The Travel Industry Association in the N.W.T. and the six zone travel associations will play an increasing role in encouraging and supporting growth of the N. W .T. tourism industry.

Tourism Development Strategy

1. Employment
 - o a "tourism skills training program" will identify manpower needs, create training programs, arrange for job placement and ensure liaison among the several responsible agencies.

o a "tourism as a career program" will help to acquaint students with tourism career opportunities and provide an early foundation for such careers.

o employee of the month/year programs will be initiated.

2. Business Opportunities

o the "accommodation and eating place program" will provide financial contributions for the construction and renovation of hotels and restaurants; a new emphasis will be placed on tourist home accommodations.

3. Community Tour Packaging Program

o to find organizer-managers to co-ordinate all tour elements and operate the tours; in addition, industry will be funded to produce and deliver training presentations on tourism hospitality.

4. Heritage and Crafts

o restaurants will be encouraged to serve native foods.

o funding will be provided for protection and preservation of natural and archaeological sites.

5. Visitor Safety and Satisfaction

o tourism businesses will be offered a personal service audit and counseling service.

6. Distribution of Tourists Among Communities

o funding for events and attractions of sufficient size and interest to hold visitors will be channeled through travel associations.

7. Research and Planning

o research and planning will be on-going.

Marketing Strategy

1. Information

- o existing programs will be continued.
- o special interest pamphlets will be developed.
- o **pre-trip** orientation programs will help to orient visitors.
- o an awareness of tourism program will help improve awareness of tourism in the communities. --
- o a new information/reservation system will be developed; Government and industry would co-operate to list tourism operators on a centralized, easily accessible system with national and international connections.

2. Consumer Promotion

- o-- to increase presence in - the existing proven geographic and demographic markets.
- o creative themes will be **developed** to convey the desired image(s).
- o Travel Arctic will increase the effectiveness of its present consumer promotion programs through:
 - o lure publications
 - o direct mail marketing
 - o better range of promotion/presentation items
 - o increased sport show attendance
 - o development of traveling exhibits
 - o improved target market advertising
- o "ambassadors for the N. W .T." will present cultural presentations at conventions, sport and trade shows.

- o a new travel promotion film and travel feature television clips will be developed.
- o an audio-visual library will be developed.

3. Trade Promotions

- o travel associations will be provided with increased opportunity to participate in the design and delivery of current travel trade promotions through:

- travel agent manual
 - attendance at selected travel agent marketplaces

- o **N.W.T.** will participate in co-operative or complementary promotion campaigns with other provinces or territories through a program called Canada West/North.
- o selected writers and photographers would be sponsored on FAM trips.
- o a "**meeting** and convention **program**" will help increase the number of business meetings and small conventions held in the N. W .T.

4. Assistance for Industry Promotions

- o a "marketing skills for tourist operators program" would train community based operators to do their own marketing.
- o promotion of package tours by operators will be supported by **co-**staging **travelog** evenings with tour operators in strategic target market cities.
- o a "**co-op** promotions program" will help communities and operators increase promotions for their products.
- o the "new markets - new promotions program" will help community based operators develop promotional programs for new products.

- o travel associations will be encouraged to promote resident travel, business **traveller** tourism, shoulder season travel, and community attraction and events.

1.7 Funding Opportunities

It is important that any development and marketing opportunities that may be identified for the Keewatin Region are developed with an understanding of the current forms of financial support that are available.

The following table provides a summary of the major funding programs currently available to the tourism industry in the Keewatin Region.

SOURCE of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
DEPARTMENT OF ECONOMIC DEVELOPMENT AND TOURISM				
<u>G. N. W. T. Business Loans and Guarantees Fund</u>	To provide term loans and loan guarantees to business enter- prises in the N.W.T. where the required credit or other financial assistance is not available. For the purposes of financing the purchase, installation, renovation, improvement, or expansion of equipment, inventory, or premises used or to be used in carrying on business enterprise.	o available to new or existing businesses registered in the N.W.T.	o loans and bank loan guarantees are limited to a maximum of \$500000 and a term of 15 years.	
<u>Eskimo Loan Fund (E. L. F.) and Eskimo Economic Development Contributions (EEDC)</u>	To provide loans and loan guarantees for the purposes including establishment of commercial business, additional working capital to existing businesses, building construction, purchase or renovation, and purchase of vehicles and aircraft to be used for commercial purposes.	o Eskimo, Eskimo co-operatives, companies, etc.	o no prescribed limit o EEDC grants may be granted in conjunction with ELF loans	
<u>Business Development Program</u>	To stimulate business development and create new employment oppor- tunities in the N.W.T; contribu- tions may be granted to new business enterprises for purchase, installation, renovation or expan- sion of facilities or for feasibility or market studies.	o any business registered in the N.W.T.	o accountable grant contributions restricted in size by employ- ment and asset considerations.	
<u>Financial Assistance to Business</u>	To support maintenance of stable business enterprises and employ- ment opportunities.	o any N. W. T. business in financial difficulty	o accountable grant contributions restricted in size by employ- ment and asset considerations.	
<u>Priority Initiatives</u>	1. Tourism Career Information - funds for developing and distributing written and audio-visual materials for tourism career awareness and educational program enrolment.			

Source of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
X	<p>2. Tourism Accommodation/Restaurant Management Contribution - funding to operators already receiving a capital contribution to assist with hiring an on-site trainer/manager for 1 year.</p>	operators already receiving capital funds	o 50% matching contribution	
	<p>3. In-Community Tour Packaging - funds for community tourism boards to develop and organize all inclusive in-community vacation offerings.</p>	Community Tourism Boards		
	<p>4. Attractions contribution towards the cost of operating in-community attractions, that are of sufficient size and interest.</p>	- Community Tourism Boards		
	<p>5. Special Interest Pamphlets contract funds for design and printing of general or special interest brochures.</p>			
	<p>6. "In-Community" Information Services contributions towards direct cost of providing community information services to tourists.</p>	Community Tourism Boards or Travel Associations		
	<p>7. Sponsor Travel Writers - funds to sponsor noted travel writers.</p>	- Tourism Associations		
	<p>8. Photo Library contract funds for hiring professional photographers to take photos for use in government/industry brochures, produce news releases and other marketing initiatives.</p>			

Source of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
	9. Travel Trade Fam Trips - contribution to offset travel expenses of national/international representatives of the retail/wholesale travel trade.	- Travel Associations		
	10. Inter-Agency Cooperative Ventures contract funds so that Travel-Arctic can enter cost-shared national/international marketing ventures with adjacent provinces and territories.			
	11. Marketing Skills - contract funds to develop self-help handbooks to help improve marketing skills of operators.			
	12. Cooperative Promotions - contribution funds to help cosponsor new marketing initiatives by local operators.	- Travel Associations		
	13. Promotion of Package Tours - contribution funds to help co-sponsor marketing initiatives of new N.W. T. tours with retailers/wholesalers.	- Travel Associations		
	14. Promotion of Shoulder Season Activities contribution to sponsor marketing initiatives aimed at increasing visitation in mid-March to mid-June.	- Travel Associations		
	15. Program Monitoring - contract funds to monitor previous 14 initiatives.			

SOURCE of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations and General Comments
DEPARTMENT OF REGIONAL INDUSTRIAL EXPANSION (Federal) and DEPARTMENT OF ECONOMIC DEVELOPMENT AND TOURISM (Territorial)	Assistance to projects which create new jobs, increase income and improve living conditions of residents in the N.W. T.	o commercial projects with a majority of Inuit employees - priority to Native entre- preneurship.	o up to 50% of costs for commer- cial projects.	
<u>Special ARDA</u>				
DEPARTMENT OF REGIONAL INDUSTRIAL EXPANSION and INDUSTRY, TRADE AND COMMERCE	To create and maintain long term employment for all Canadians.			
<u>Industrial and Regional Development Program</u>	<p>1. Establishment</p> <p>i) Studies - funding for project feasibility y, market research or venture capital search associated with pros- pective establishment project.</p> <p>ii) Plant Establishment establishment of new facilities.</p> <p>2. Modernization/Expansion</p> <p>i) Studies - for project feasibility studies, market research and venture capital search.</p> <p>ii) Modernization upgrading tourism operations.</p>		<p>o Maximum sharing ratio of 50%.</p> <p>o Maximum cost sharing ratio of 50% (minimum capital cost of \$50 000).</p> <p>o Maximum sharing ratio of 75%.</p> <p>o Maximum sharing ratio of 50% (minimum capital costs of \$50 000).</p> <p>o Maximum sharing ratio of 50% (minimum capital costs of \$50 000).</p> <p>o Maximum sharing ratio of 75%.</p>	

SOURCE of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
<p>DEPARTMENT OF REGIONAL INDUSTRIAL EXPANSION and INDUSTRY, TRADE AND COMMERCE</p> <p><u>Industrial and Regional Development Program</u> (continued)</p>	<p>iii) Expansion - expansion of tourism facilities</p> <p>3. Marketing</p> <p>assistance for market research and development</p>			
<p>GOVERNMENT OF CANADA & GOVERNMENT OF THE NORTHWEST TERRITORIES</p> <p><u>Economic Development Agreement for the Northwest Territories</u></p>	<p>To sharpen business skills of northerners and to promote business growth and community economic planning.</p> <p>To provide northerners with the option of improving economic opportunities.</p>	<p>1. Human Resource Development</p> <p>i) Business Management Development Program</p> <ul style="list-style-type: none"> o to improve the manage- ment capabilities of northern businesses and to make oppor- tunities available for northerners to be employed as business managers. o individuals, groups or associations of employers and local development corporations are eligible for funding. o available for projects that will ultimately produce qualified northern business managers. 	<p>Funding for:</p> <ul style="list-style-type: none"> o evaluation/review of a range of potential options which would improve the management skills of northerners. o consulting services to assist in the preparation of specialized teaching materials or support programs. o programs to employ a consultant or trainer. o up to \$100 000, limited to a 12 month period; maximum for a project is \$300000 over 36 months. 	

Source of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
<u>Economic Development Agreement for the Northwest Territories</u> (continued)	<ul style="list-style-type: none"> ii) Options North <ul style="list-style-type: none"> o to encourage and support native northerners to overcome the barriers they face in participating in a wage economy. 	<ul style="list-style-type: none"> o available to employers, associations, agencies and non-profit organizations who are prepared to establish a counseling project. 	<ul style="list-style-type: none"> o to recruit and hire trained counselors to deal individually with people, to prepare them for employment opportunities. <p>Representatives areas include:</p> <ul style="list-style-type: none"> - life skills counseling - alcohol and drug awareness - family counselling <p>0 up to \$100000 for 12 months; maximum \$300000 over 36 months for one project.</p>	
	2. Natural Resource Development			
	<ul style="list-style-type: none"> i) Intersettlement Trade <ul style="list-style-type: none"> o support for planning and development of intersettlement trade (soapstone & country foods). 	<ul style="list-style-type: none"> o communities and regional groups, individuals, businesses and companies registered in the N.W.T. may apply. 	<ul style="list-style-type: none"> o up to 100% funding for Opportunity Identification o up to 100% funding for Feasibility Studies. o up to 100% funding for Product Development and Test Marketing. o up to 100% for Resource Inventory and Assessment Programs. 	
	<ul style="list-style-type: none"> ii) Renewable Resource Use Planning & Implementation <ul style="list-style-type: none"> o to encourage development of commercial use of renewable resources within the N.W.T. and to produce goods for sale in other areas. 	<ul style="list-style-type: none"> o available to individuals, businesses, communities and regional groups. 	<ul style="list-style-type: none"> o up to 75% of development costs for development of commercial fisheries and commercial activities with a wildlife base. o up to 100% of the approved costs required for data collections, analysis and interpretation to assess whether or not a resource can be commercially developed. 	
	3. Domestic Market Development			
	<ul style="list-style-type: none"> i) Business Assistance <ul style="list-style-type: none"> o to respond to problems facing small business, funding will be available for: 	<ul style="list-style-type: none"> o individuals, businesses, or regional economic development organizations. 	<ul style="list-style-type: none"> o up to 90% of approved costs of consulting services for business opportunity identification. 	

Source of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
<u>Economic Development Development Agreement for the Northwest Territories</u> (continued)	<ul style="list-style-type: none"> - opportunity identification - small business development incentives - business services infrastructure - small business interns 		<ul style="list-style-type: none"> o up to 40% of eligible costs to a maximum of \$100000 for establishment of a new facility; up to 30% eligible costs to a maximum of \$50000 for the expansion or modernization of an operating business (the applicants equity contribution must be at least 20% of eligible costs). o up to 75% of relocation costs to attract professionals to the N. W. T.; the sponsoring organization must provide the remaining 25%. o up to 50% of a managerial candidate's salary for a twelve month period, up to a maximum of \$15000 or \$1250 per month. 	
	ii) Tourism Development o to encourage a well-planned and orderly expansion of the tourism sector.	a) Regional Planning Program o available to Federal and Territorial governments, travel associations or tourism industry sector organizations or municipal/community endorsed projects submitted by regional or area groups or non-profit organizations.	<ul style="list-style-type: none"> o up to 100% of costs, provided the association guarantees a 10% in-kind contribution. o G. N. W. T. projects are eligible for 60% of costs. 	
		b) Tourism Hospitality/Awareness Programs o development work for Tourism funding to be done by GNWT while travel associations will implement.	<ul style="list-style-type: none"> o up to 100% for development of programs and support materials and 100% for conducting programs. 	
		o direct contributions to Travel Industry Associations of N.W.T. for development of a hospitality awareness package; and contributions to sponsoring associations, organizations or firms for delivery of program.	<ul style="list-style-type: none"> o up to 100% of costs for development and delivery of programs. 	

Source of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
<u>Economic Development Agreement for the Northwest Territories</u> (continued)	3. Community-Based Economic Development Planning	<ul style="list-style-type: none"> c) Tourism Association Support Program <ul style="list-style-type: none"> o tourism associations. d) Tourism Superstructure Program <ul style="list-style-type: none"> o available to private sector entrepreneurs, non-profit organizations currently operating tourist facilities and travel associations. e) Travel Generators Expansion Program <ul style="list-style-type: none"> o for private sector entrepreneurs, non-profit organizations, or travel associations. f) Tourism Marketing Programs <ul style="list-style-type: none"> o funds available to zone travel associations to stimulate interest for N.W.T. package tours among southern wholesalers. o available to travel/tourism associations to research, design, produce and distribute pre-trip information packages. o for zone tourism/travel associations to develop two-year destination zone marketing strategies. 	<ul style="list-style-type: none"> o up to 100% of eligible costs for program development fees, production and distribution of support materials, costs of staging seminars and travel costs. o direct contribution to the owner/operator for upgrading/modernization, expansion and establishment of facilities; a minimum of \$1 000 and maximum of \$50 000 available. o up to 60% of capital costs to develop attractions and events (priority given to areas where a tourism study has identified an opportunity); minimum of \$1000 and maximum of \$50000. o variable contribution 	<ul style="list-style-type: none"> o up to 100% for consulting fees.

Source of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
DEPARTMENT OF REGIONAL INDUSTRIAL EXPANSION				
<u>Native Economic Development Program</u>	To provide improved coordination of federal government programs and policies in support of Native economic development.			
	1. Aboriginal Economic and Financial Institutions. o to assist with the building of Aboriginal financial and economic institutions.	o available to national, provincial, territorial, community, regional and urban-based Aboriginal economic and financial institutions.	o investments will be in the form of contributions to new and existing Aboriginal economic/ financial institutions; other federal and provincial assistance granted will be taken into consideration in determining NEDP contributions.	
	2. Community-Based Economic Development o to assist with economic development in a pre- determined number of communities.	o available to communities Selected by the NEDP Secretariat.	o contribution agreement	
	3. Special Projects o to provide investment in community-based economic development projects and Aboriginal owned and controlled enterprises of a high priority which conform to NEDP strategic objectives. o funding for training programs, marketing and product development.	o available to individuals, associations, partnerships, co-operatives, corporate bodies and non-profit organizations.	o contribution agreement	

Source Of Funds/ Name of Program	Purpose of Assistance Program	Qualifications or Criteria for Eligibility	Form of Assistance Program	Limitations or General Comments
DEPARTMENT OF ECONOMIC DEVELOPMENT AND TOURISM	To provide term loans and loan guarantees to business enter- prises in the N.W.T. where the required credit or other financial assistance is not available.	o available to new or existing businesses registered in the N.W.T.	o loans and bank loan guarantees are limited to a maximum of \$500000 and a term 15 years.	
<u>G. N. W. T. Business Loans and Guarantees Fund</u>	For the purposes of financing the purchase, installation, renovation, improvement, or expansion of equipment, inventory, or premises used or to be used in carrying on a business enterprise.			
<u>Eskimo Loan Fund (E.L.F) and Eskimo Economic Development Contributions (EEDC)</u>	To provide loans and loan guarantees for the purposes including establishment of commercial business, additional working capital to existing businesses, building construction, purchase or renovation, and purchase of vehicles and aircraft to be used for commercial purposes.	. Eskimos, Eskimo cooperatives, companies, etc.	o no prescribed limit o EEDC grants may be granted in conjunction with ELF loans.	

2. TOURISM RESOURCE INVENTORY AND ANALYSIS

2.1 Introduction

With its unique natural resources and culture the Keewatin Region has potential to develop a variety of specialty tourism activities and products.

X In order to identify the potential tourism activities and products in the Keewatin region it was necessary to gain an understanding of the area! tourism resource base considering both the land, the people and their culture. The following chapter provides a summary of the tourism resource inventory and analysis which was undertaken for the Keewatin region **tourism** study.

The objective of the Keewatin tourism study is to examine the potential for community based tourism with the emphasis on concentrating economic benefits from tourism within specific communities. Due to the isolated nature of the Keewatin communities, community-based tourism offers the greatest potential benefits to northern residents. However it is also the intent to identify regional or hinterland opportunities, particularly those that can provide economic benefits indirectly to the communities.

Thus the resource inventory and analysis was undertaken at two levels of detail. First, a regional analysis has identified the most significant resource characteristics of the region - those **which** present major opportunities or constraints to tourism development. To a large extent this phase of the analysis was completed using secondary data sources.

Second, a more detailed inventory and analysis was conducted for the community based resources including existing facilities. Information from secondary data sources was supplemented with a first hand knowledge of each community gained through four separate community visits and numerous trips out on the land.

- ii) Community **Specific Tourism Resources**: provides an inventory and analysis of the tourism resources and associated opportunities found in and **around** the seven communities.
- iii) Regional Tourism Resources: provides an inventory and analysis of the tourism resources and related opportunities found in the hinterland areas.

202 Regional Resource Base

2.2.1 -.Regional Overview

districts no longer used, or delineated.

The Keewatin Region represents one-of the five **Territorial** Government administrative districts. Bounded on the west by the District of Mackenzie the Keewatin Region lies almost entirely between the Arctic Circle to the north and the treeline to the south, and to the **east** forms the western shore of Hudson Bay. The region is comprised of approximately 592000 km² representing close to 18% of the Northwest Territories land-base. It is also of interest to note that the Keewatin Region **lies** at the geographical centre of **Canada**.

No maps provided.

The seven communities which comprise the Keewatin Region are indicated on Drawing **No.1**. **These** seven communities are home for approximately 4327 people (1981 Census) of which approximately 86% are **Inuit**. This tot al population represents close to 10% of the Territorial population.

Because of their remoteness the Keewatin communities sre serviced only by air and water. Scheduled air service into the Keewatin is provided through Winnipeg and Churchill to the south and Yellkowknife snd **Frobisher** Bay to the west and **east** respectively. Each of the communities in the Keewatin Region have scheduled air access at least twice weekly, some as many as five times a week. The major trade routes into snd out of the Keewatin **are** limited to **regular** air freight services south to Winnipeg, an annual sealift from Montreal to Repulse

descent. The percentage of **Inuit** composition in the communities varied from 93.9% in Eskimo Point to 72.3% in Rankin Inlet, the regional government administrative **centre**.

The following table provides a comparison of the age distribution throughout the Keewatin Region as compared to the age distribution of the Northwest Territories population as a whole, and a typical southern province, Ontario.

TABLE
AGE DISTRIBUTION IN THE **KEEWATIN**

Region	Age Distribution				
	0-4 yrs %	5-14 yrs. %	15-64 yrs. %	65 years + %	
Keewatin (1978)	15.1	30.0	53.2	1.7	= 100
N.W.T. (1978)	12.3	23.2	61.8	2.7	= 100
Ontario (1981)	2.0	15.0	6.8	1.0	= 24.8 ?

It is evident that there is a higher proportion of school age and **pre-school** age children in the Keewatin Region as compared to both the Northwest Territories as a whole and the province of Ontario. The implications of this are that over the next 10-15 years there will be a large influx of young people into the Keewatin work force.

This leads to the question of whether or not there will be enough job opportunities to fill the demand.

At the present time the economic base of the Keewatin Region relies heavily on small businesses, indigenous renewable resources and a relatively small tourism industry.

In 1981/82 the per capita income in the Keewatin Region was estimated to be \$4800.¹⁾ Approximately 8% of this figure was accounted for by government transfer payments including welfare, old age pensions, family allowances and trapper grants. Other income sources included private firms, government employment, trapping, fishing and the sale of arts and crafts. However, to be

1) Keewatin Region Economic Base study;
H.T. Ruitenbeck Resource consulting Ltd., 1983.

X **realistic**, one should also consider the imputed income value of ~~subsistence~~^e hunting and fishing. The Keewatin Region Economic Base Study estimated the average imputed income due to country food consumption for the Keewatin at \$1400 per capita. Thus the more realistic total estimated per capita income would be \$6200 compared to a figure of \$8893 per capita for Canada as a whole in 1981. However, this figure is somewhat deceiving because of the large number of dependants in northern families. The average income per household in the Keewatin Region, including the imputed value for country food consumption, was estimated in the Keewatin Region Economic Base Study at \$30 700.00, which is **low when** one considers the high cost of living in the north.

X Looking at the various income sources in the Keewatin it is ^o**abvious** that the Government (federal, territorial end local) is the largest employer. Government income revenues represent 66% of the total regional income revenues.

In 1982, total Government employment incomes for the Keewatin Region were \$13667000, ranging from \$576000 in Whale Cove to \$6434000 in Rankin Inlet. These figures compared to a total income value of \$4782000 (1982) from private firm employment with the great est income revenues occurring in Baker Lake (\$1 776 000). Private firm employment income represent ed approximate ely 23% of "the total regional employment income, (including the Co-ops).

Another major economic activity in ~~the~~ Keewatin communities is renewable resource harvesting. **Polar** bears, seals, foxes and wolves are hunted and trapped for their furs. Whales and walrus provide ivory for the erts **and** crafts industry. And caribou, whales, walrus end game birds provide a major food source. Total revenues from the sale of furs in the Keewatin amounted to \$151 067 in 1982. The revenues in the communities ranged from \$2400 in Chesterfield Inlet to \$58150 in Coral **Harbour**.

In addition to the sale of furs, commercial fishing provides a significant income to residents in Rankin Inlet, Whale Cove end Chesterfield^{Inlet}. ^{At} the present time there is only one commercial fish plant in the region, located in Rankin Inlet and owned and operated by the G. N.W. T. Ice plant facilities have recently been built in both Whale Cove and Chesterfield Inlet to help supply the Rankin fish **plant**. In 1982, total revenues from the operation of the fish plant amounted to \$125000 of which \$100000 were export revenues. Approximately 80% of the catch is exported to Winnipeg and other southern cities.

X In the non-renewable resource sector relatively little has been developed to date in the Keewatin Region. The one producing mine in the region, the **Cullaton** Mine, is located southwest of the community of Eskimo Point. The **Cullaton** Mine was started in late 1981 and **gradually** reached 95% efficiency by 1982, However, gold prices have **consistently** been lower than anticipated and the mine has consequently been operating at a loss through most of its existence. The mine has been estimated to have a productive life span of 5-20 years (depending on gold prices). In terms of economic benefits to Keewatin communities the mine has a local hiring program and in future they are looking to utilize local contracting businesses more and more. In the future there may be potential for further mines in the Keewatin Region but at the present time exploration activity is down from past years because of the state of the mineral markets.

Oil and gas exploration represents the other major component of the non-renewable resource sector. **There** is evidence of two large sedimentary basins in Hudson Bay, however to date drilling activity has been limited. The ultimate potential of the region is reported to be significant but in the short term the prospects are unlikely due to access problems.

The only other significant economic activity in the Keewatin Region is the tourism industry. Very little documentation is available on the economic impact of the industry. However, in 1981 it was estimated that visitors to the region spent a total of \$5 000 000, and over the summer of 1982 a total of \$660 000 was spent.¹⁾ These figures are **felt** to be very rough estimates.

In addition to the tourism activity centred in the communities there are a total of eleven seasonal fish camp operations in the Keewatin Region which generated a total of approximately \$2 000 000 in gross revenues in 1982. The impact on the communities would have been minimal because very little local hiring is done and supplies are generally brought in directly from the south.

A small amount of sport fishing does occur in the communities and it was estimated that in 1982 this sector generated \$44 000 in employment income and accounted for approximately 3.7 man years of employment for local residents.

1) Keewatin Region Economic Base Study;
H.J. Ruitenbeek Resource Consulting Ltd., 1983.

223- **Biophysical Resources**

Biophysical resources refer to those parts of the landscape existing as a result of natural processes and include topographic-geologic features, climate, vegetation, and fish and wildlife resources.

In the following section the **biophysical** resources are discussed under the headings of:

- i) Climate
- ii) **Physiography**
- iii) Fisheries and Wildlife
- iv) Vegetation

i) Climate

Climate is an important consideration when trying to identify an area's tourism potential, particularly in an area like the Keewatin. Generally there are three components or climatic considerations with respect to tourism that have to be considered. First, a tourist entering the Keewatin region normally flies in. Clear weather conditions are essential when traveling to the Keewatin communities because the small planes that access the communities lack the sophisticated equipment necessary to land when ceilings are below ^{metres} 400 feet. Second, upon arriving in the **communities**, many of the tourism opportunities and activities lie outside the communities and require local transportation by skidoo or boat, depending on the season. Again this local travel is very dependant on suitable weather conditions. Third, when the tourists finally reach their destination they require suitable weather conditions to fully enjoy their chosen activity.

The climate in the Keewatin region and its impact on existing and potential tourism and recreation activity is a study in itself. However, only a limited number of details have to be known about both the regional climate and the more specific community climates in order to determine the major constraints and opportunities for tourism. The following six tables provide a summary of the region's major climatic variables including:

1. Freeze-up/break-up dates
2. Temperature and wind chill

TABLE 2-1

MEAN FREEZE-UP AND BREAK-UP DATES

Community	Freeze-Up	Ice Safe for Traffic (Range of dates)	Ice Unsafe for Traffic (Range of Dates)	Break-Up
Baker Lake	Oct. 24	Oct. 20 - Dec. 12	May 14 - June 29	July 15
Chesterfield Inlet (Spurrell Inlet)	Oct. 10	Nov. 3 - Jan. 30	Apr. 14 - July 2	May 31
Coral Harbour	Oct. 5	Oct. 4 - Nov. 6		July 25
Eskimo Point	Oct. 30			July 1
Churchill (Hudson Bay)	Nov. 17		May 1 - June 16	July 16
Ennadai Lake	Oct. 22			July 4

Sources:

Freeze-up, Break-up and Ice Thickness in Canada; Fisheries and Environment Canada.
N.W.T. Data Book 84/85; Outcrop Ltd.

→ How about minimum number of safe ice days by community and minimum number of days of open water by community?

TABLE 2-2

COMPARATIVE TEMPERATURE AND WIND CHILL DATA

COMMUNITY/AREA	MEAN DAILY/MEAN DAILY MINIMUM TEMPERATURES						MEAN WIND CHILL INDEX ●					
	JAN	MAR	MAY	JULY	SEPT	NOV	JAN	MAR	MAY	JULY	SEPT	NOV
Baker Lake	-33.0 /-36.4	-27.9/-32.0	-6.4/-10.2	11.0/6.0	2.3/-0.7	-20.3 /-24.3	VI	v	II	I	H	N
Chesterfield Inlet	-31.5 /-35.2	-26.5 /-30.8	-6.0/-9.5	8.9/4.6	2.5/0.1	-17.4/-21.2	VI	v	u	I	H	N
Coral Harbour	-29.7/-33.8	-25.2 /-30.2	-6.3/-10.5	8.7/4.2	0.9/-2.0	-17.5 /-21.8						
Ennadai Lake	-30.9/-34.8	-23.8 /-28.7	-2.7/-7.1	13.0/8.2	3.9/0.7	-17.3 /-21.2	v	v	II	I	H	N
Whale Cove	-31.4 /-34.7	-25.4 /-29.9	-5.4/-8.8	8.4/4.2	-1-	-16.0 /-19.7						
Yellowknife	-28.8 /-33.0	-18.9 /-24.7	5.0/-0.1	16.3/11.8	6.7/3.5	-14.1 /-18.0	N	III	I	I	I	HI
Frobisher Bay	-25.6 /-29.7	-22.7/-27.5	-3.2/-6.6	7.6-3.7	2.4/-0.3	-13.0 /-16.9	N	HI	II	I	H	III

* Wind Chill Indices

class I	Comfortable with normal protection.
class H	Work and travel become uncomfortable unless property clothed.
class HI	Work and travel become hazardous unless properly clothed. Heavy outdoor clothing necessary.
class N	Unprotected skin will freeze with prolonged direct exposure.
class v	Unprotected skin will freeze in one minute with direct exposure.
class VI	Adequate face protection becomes necessary. Work and travel alone extremely hazardous.

Sources: The Climatic Classification of the Northwest Territories for Recreation and Tourism, (unpublished manuscript).
 Canadian Normals; Wind 1955-1972
 Canadian Normals; Wind 1951-1980
 Canadian Normals; Temperature and Precipitation 1951-1980

← how about annual total percentages?

TABLE 2-3

PERCENTAGE FREQUENCY CLEAR SKIES

COMMUNITY	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Baker Lake	34.5	34.0	43.8	36.7	16.9	7.5	8.8	8.1	5.7	8.7	24.9	35.0
Chesterfield Inlet	46.9	46.6	49.8	33.5	19.1	9.3	14.2	11.2	6.2	8.2	26.3	45.0
Coral Harbour	34.9	35.9	38.8	32.6	11.1	4.8	4.5	4.1	4.2	10.6	22.4	33.0

Source: Airport Handbook Index, (unpublished manuscript); Environment Canada

TABLE 2-4

MEAN NUMBER OF DAYS WITH RAIN

COMMUNITY	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Ott	Nov	Dec		
Baker Lake	O	O	O	*	1	6	9	1	O	8	3	*	*	
Chesterfield Inlet	0	0	0	*	1	5	9	9	8	4	*	*		
Coral Harbour			*	*	*	*	1	5	11	10	6	2	*	*
Ennadai Lake		O	0	0	0	*	4	8	12	12	10	3	*	0
Whale Cove	0	0	0		M	M	5	8	M	M	M	0	0	

* amounts less than 0.5 except O

M Missing

Source: Climatic Normals: Temperature and Precipitation; Environment Canada

TABLE 2-5

MEAN NUMBER OF DAYS WITH SNOWFALL

COMMUNITY	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Ott	Nov	Dec	
Baker Lake	7	6	8	9	6	2	0	*	5	12	10	8	
Chesterfield Inlet	6	4	7	8	6	2	*	*	3	11	10	9	
Coral Harbour			7	7	7	8	8	3	*	5	12	11	9
Ennadai Lake		9	7	9	9	6	2	0	*	4	13	13	10
Whale Cove	4	2	3	M	M	1	0	O	M	M	M	6	

TABLE 2-8

COMPARATIVE FLYING RESTRICTIONS

	% FREQUENCY OF CEILING 200 FT. AND/OR VISIBILITY 1 MILE <i>metric find</i>						% FREQUENCY OF CEILING 500 FT. AND/OR VISIBILITY 1 MILE <i>metric</i>					
	Jan	Mar	May	July	Sapt	Nov	Jan	Mar	May	July	Sapt	Nov
Baker Lake	12.6%	7.5%	2.0%	1.2%	0.2%	6.3%	18.0%	11.3%	4.9%	2.2%	2.2%	10.496
Chesterfield Inlet	6.0%	3.9%	2.0%	2.6%	1.8%	5.1%	9.1%	6.4%	5.8%	5.3%	4.9%	11.6%
Coral Harbour	6.0%	2.7%	3.0%	2.8%	4.0%	7.496	8.5%	5.0%	7.1%	6.8%	8.6%	12.1%
Frobisher Bay	2.2%	1.3%	0.4%	1.5%	0.6%	1.3%	5.0%	3.0%	2.1%	4.8%	3.1%	4.0%
Cambridge Bay	7.3%	3.1%	3.4%	1.3%	1.8%	2.1%	13.6%	6.4%	8.9%	3.6%	7.2%	6.7%

Sources: Airport Handbook Index (Unpublished manuscript); Environment Canada.
Principal Station Data: Churchill; Environment Canada

3. Clear weather frequency
4. Days with rain
5. Days with snow
6. Flying restrictions

The preceding climatic data can be summarized into several basic factors that need to be considered from a tourism suitability standpoint. These basic factors are the activity **seasons**, flying weather, length of activity day and percentage of days with inclement weather restricting outdoor activity. The following presents a point form summary of the major opportunities and constraints under each of these factor categories.

Activity seasons

- o the Arctic year is best divided into four seasons.. based on the condition of water adjacent to the settlements as follows:

Summer	-	ice free season
Winter	-	frozen period
Fall	-	temperatures begin to drop below freezing
Spring	-	snow begins to melt.

*rather obvious don't you think!
- what factor is better!*

- o the **start** of the winter season in the Keewatin, represented by the date of complete freeze over, varies from early October in Coral **Harbour** to late October in communities like Baker Lake and Eskimo Point.

- o the beginning of the summer season, represented by the date that **Hudson's Bay** and local lakes are free of ice, ranges from late May at Chesterfield Inlet to late July at Coral **Harbour**.

- o in general the seasons in the Keewatin can be classified as follows:

Summer	-	early or mid July - September
Winter	-	mid November - March
Spring	-	April - mid July (includes break-up)
Fall	-	September - mid November (includes freeze-up)

- o the months of mid October - mid November and mid June - early July are transition periods when the ice is breaking or freezing and travel on the land is restricted.

Flying Weather

- 0 the coastal areas experience poor flying weather at any time during the year, but particularly during the spring and summer due to extensive fog.
- X 0 the inconsistency of foggy conditions from community to community accentuates the problem.
- 0 the inland or tundra areas experience generally good flying weather in the summer and generally poor flying weather in the winter due to blowing snow and white-out conditions.
- 0 coastal areas show relatively high cloudiness conditions in winter and the more continental areas have generally low cloudiness conditions.
- 0 The following table provides an indication of the percentage of time that below VFR* flying conditions are experienced in typical coastal and continental communities.

TABLE 2-7
 PERCENTAGE BELOW VFR CONDITIONS
 (Ceiling below 500 ft, visibility below 1 mile)

	February	April	July	September
Baker Lake	20.5%	8.6%	2.2%	2.2%
Chesterfield Inlet	16.6%	7.3%	5.3%	4.9%
Coral Harbour	10.6%	6.5%	6.8%	8.6%
Churchill, Manitoba (important as a gateway point)	7.9%	8.0%	10.7%	7.7%

Length of Activity Day

(Activity day is defined as the period of daylight plus **civil** twilight that allows for normal outdoor activity).

* VFR - Visible flight readings

metric

huh!?

- 0 daylight increases rapidly in **March** so that at least 12 hours of daylight occur everywhere in the Keewatin by the end of the month.
- 0 Repulse Bay experiences 24 hours of darkness on the winter solstice (late December) and 24 hours of sunlight on the summer solstice (late June).
- 0 Coral **Harbour** and Baker Lake experience **less** than 6 hours of activity day from early December to early January and close to 21 hours of sunlight in late June.
- 0 Eskimo Point experiences 19 hours of sunlight in late June.

Inclement weather constraints

- o when compared with other areas in the **Northwest** Territories, a number of interesting points are evident.
 - X the Keewatin region has a higher incidence of poor ~~visibilities~~ than other areas.
 - o the highest mean wind chill-factors occur in the Keewatin due to the most extreme combination of low temperatures and strong winds.
- o the months of December to **March** are extremely cold with short activity days; outdoor activity is severely curtailed by extreme wind chill factors and blowing snow (blowing snow occurs at least 25% of the time in Baker Lake from December through February).
- 0 March to April is generally characterized by fine weather, however, the heat from the sun does not make an impression until April.
- 0 May to June is a transitional period characterized by extensive cloudiness and precipitation.
- 0 June and August are the warmest but wettest months.
- 0 September to November is a transitional period characterized by frequent storms; these are the snowiest months.

0 the major constraints for water based activities in the summer are fog and wind squalls; excessive winds curtailing boating activity is a common problem experienced by all Keewatin communities throughout the summer.

o May and July are the best months for tourism.

ii) **Physiography**

Physiography and Vegetation

The Keewatin falls within the physical region referred to as the Central Arctic characterized by extensive bedrock outcrops and tundra vegetation. A small portion of the Keewatin, that area below the treeline, ~~ext~~ends into the physical region referred to as the Western Shield Subarctic.

In general terms the Keewatin Region can be divided into four major physiographic features.

- i) Upland coast
- ii) Limestone ~~coasts~~
- iii) Rock-knob glaciated lowland
- iv) Glacial deposition

The greatest physical relief in the Keewatin is found in the upland coast regions which are found in Wager Bay, on Southampton Island and on Coats Island. Upland coast regions are responsible for some of the finest scenery in the arctic. Wager Bay is characterized by a high ~~cliffed-lined~~ south coast rising to 490 m and incised by deep narrow valleys. The north coast provides **more** gentle relief with high rounded hills and meandering river valleys.

The north coast of Southampton Island is **characterized** by isolated hills extending to 600 m, an abrupt ~~diff~~-lined coast along with a **number** of vertical walled inlets created by ancient ~~cirque~~ glaciers. The northeast coast of Coats Island, the third upland coast area is comprised of high cliffs bounded by high hills and long crescent shaped beach areas.

The limestone coasts which surround most of Southampton and Coats Islands are characterized by low rock ridge shorelines leading into a flat to gently rolling inland terrain.

The area between Repulse Bay and the Maguse River near Eskimo Point is termed rock-knob glacial lowland. The coast is comprised of an exhumed surface developed on granites and metamorphosed sediments. The glacial rebound which is **occurring** along this coastline has resulted in extremely shallow coastal areas with extensive shoals.

The lowland coast rises gradually westward across the inland tundra to an elevation of 175 m near the west end of Baker Lake, providing little relief other than rock ridges, river valleys and lakes.

The area south of the Maguse River is referred to as an area of glacial deposition characterized by large tidal flats and flat to gently **rolling** terrain.

The Keewatin provides one of the harshest botanical environments, referred to as the tundra. The principal characteristic of the tundra is the absence of trees. The three major factors which inhibit vegetative growth in the Keewatin are:

- i) Extreme temperatures
- ii) Permafrost which creates restricted drainage and contributes to soil motion like solif **luction**; and
- iii) The undeveloped soils which are shallow, acidic and lack important nutrients.

Although at first glance the Keewatin may appear barren, there is in fact a ^{surprising} variety and abundance of plant life, although much of ~~it~~^{and} is comprised of **lichens** and dwarf species which tend to cling to the ground. In general there are six main vegetative groups found within the Keewatin Region. X

Four of the groupings are associated with tundra vegetation. Lichen-moss tundra is found in **dry-subarid** conditions like up^{land} areas and **old dry** river beds. The main species found under these conditions are ~~Reindeer~~^{lichens} moss, ~~Lichens~~^{lichens} and Iceland moss.

In the more southerly areas heath tundra is ⁿ**predominat**, characterized by blueberries, crowberries and alpine cranberries.

In the poorer ⁿ**drianed** areas scattered throughout the region, referred to as wet tundra the prominent species include cotton grass and sedges.

Adjacent to the treeline one finds the bush tundra, an area characterized by willows, alders and **herbaceous** undergrowth.

The treeline itself extends across the southern end of the Keewatin Region. The treeline provides the northern limit for species like white spruce and sometimes larch. It is interesting to note that there is a tree line **anomaly** that extends well beyond the normal treeline up the **Thelon** River. This unique situation is caused by the presence of plentiful summer ground moisture without a restricting high permafrost table adjacent to the river.

The sixth vegetation grouping is termed the arctic desert. Found in the upland areas arctic **deserts** are characterized **by an** absence of vegetation with plants like mountain **avens, saxifrage** and arctic poppy growing in dispersed **tussocks**.

A

iii) Fish and Wildlife

The arctic landscape supports a surprising variety and abundance of wildlife including marine, terrestrial and **avian** species. Marine mammals common to the Keewatin Region include polar bear, walrus, **beluga** whales, narwhal, killer whales, and several species of seals. Principal species of terrestrial mammals include barren-ground caribou, **muskox**, arctic wolf, arctic fox, sic-sits, arctic hares, wolverines, and barren-ground grizzly bears. Major bird species include geese (snow **and** Canada), **sandhill** cranes, whistling swans, rough-legged hawks, **gyrfalcons**, peregrine **falcon**s, snowy owls, loons, **murres**, **guillemotts** and ducks.

The opportunity for seeing or hunting **these** and other less numerous and less significant species provides one of the major tourist attractions in the Keewatin. Unlike some of the other arctic regions, certain wildlife species in the Keewatin are accessible and very visible. Some of the more visible and abundant wildlife species include caribou, walrus, polar bear, ducks, geese, seabirds and falcons.

It is important to note that the migratory nature of many of the wildlife species has definite implications for the **seasonality** of tourism activities. Many of the animals in the Keewatin Region are common only during the summer; others are found close to settlements only during specific times of the year; and still others are most visible during specific seasons when they are most active. In general, the wildlife resources are most abundant and most varied during the summer (open water) season.

The potential for viewing and photographing wildlife in the Keewatin provides a major opportunity. In addition, there is considerable potential, which has only been partially tapped, for the development of sports hunting for polar bear and caribou, and possibly walrus and muskox.

The waters of the Keewatin Region are well populated with a large variety of sport fish species including:

- o Arctic Char
- o Lake Trout
- o **Grayling**
- o Whitefish; and
- o Pike.

The major species from a recreational standpoint are Lake Trout, Arctic Char and **Grayling**. Lake trout are normally found in the deep fresh water lakes. They spawn over gravel or rock in shallow water especially near the mouths of tributary streams in August or September. **Grayling** are commonly found in clear lakes, rivers and streams and often concentrate around rapids. The grayling move into small tributaries to spawn in May and June.

Both **anadromous** and resident char are found throughout the Keewatin. The **anadromous** char begin to migrate seaward at spring break-up. Migration back up the rivers to spawn occurs in August and September.

The Keewatin Region's countless lakes, **rivers and** streams and abundant fish populations, including trophy sized fish, provide a major tourism opportunity.

2.2.4- Historical Resources

The history of the Keewatin Region is both interesting and varied with, as is typical of northern areas, countless highly visible artifacts and remnants of bygone days. The historic resources found throughout the Keewatin can generally be classified under a number of themes which represent significant segments_ or eras of the region's past. _ Based on extensive historical research coupled with a first hand knowledge of the **region's** resources we have identified the most significant historical themes from a tourism perspective.

- a) **Inuit** history/culture (**pre-contact** period)
- b) Post Contact **Inuit** history/culture
- c) Search for the Northwest Passage —
- d) Whaling era
- e) Fur trade era
- f) Missionary era
- g) Policing the north (the R. C. M. P.)
- h) Geographic/scientific exploration
- i) Mining

much stronger theme in Arctic Coast Region.

The historic sites and artifacts associated with these themes, that are found scattered throughout the region, provide **opportunit y** for development of attractions based on viewing, interpretation and participation.

X The following synops~~s~~ will provide some idea of the elements and opportunities associated with each of the themes.

a) Pre-contact Inuit history/culture

The intent of this theme would be to portray the cultural **characterics** and lifestyles of the original **Inuit** cultures that inhabited the Keewatin region. Remnants from the pre-Dorset, **Dorset** and **Thule** cultures are found scattered throughout the Keewatin. A number of these sites have been subjected to archaeological digs and a wealth of information is now available.

↳ Who has it? ---

b) Post-Contact Inuit history/culture

When the first white men reached the Keewatin Region back in the 17th century, the **Thule** culture had split up and the Keewatin **Inuit** were divided into a number of smaller cultural groups. These separate cultural groups were characterized by their geographic **distrib~~ution~~** as well as language dialects, technology and ethos. The three main cultural groups in the Keewatin were the ~~Saglermiut~~ on Southampton Island, the **Aivilingmiut** around Repulse Bay and the Caribou Eskimos further south. Following their contacts with the whites, these groups began a major **acculturational** shift.

X

Saltirmiut ←

↳ is this a word

Remnants and knowledge of this era exist throughout the Keewatin and could provide the basis for presentation and interpretation of the post contact story of the Keewatin **Inuit**.

c) Search for the Northwest Passage

As early as the 17th century, Europeans began to search for the elusive Northwest Passage on the west side of Hudson Bay. The earlier explorers in the search for the passage in Hudson **Bay** included Thomas Button in The Resolution and Lake Fox. Possibly the most widely known explorer among modern day Keewatin residents was James Knight who set sail from Churchill in 1719 to search out the Northwest Passage. It wasn't until the mid 1700s that a Captain **Middleton** finally put to rest the idea that the Northwest Passage was to be found in Hudson Bay.

much
strange
things
Arctic
Coast region!

d) Whaling Era

X During the period between 1765 and 1910, American whalers along with the Hudson's Bay Company were actively whaling in Hudson Bay. They sought the beluga whale as well as the large bowhead whales.

The presence of the whalers in the Keewatin Region had a major effect on the local Inuit population. For many Inuit this was their first real exposure to white men and their technologies. The Inuit crewed in the whale boats, traded with the whalers and often established winter camps near the ships which wintered at Marble Island and Depot Island.

There are still some very visible reminders of the whaling era at certain locations along the Hudson Bay coast.

e) Fur Trade Era

X The intent of this theme would be to illustrate the story of the free-traders, like Revillon Freres and F.N. Monjo, and the Hudson's Bay Company and their respective roles in advancing the fur trade frontier. From the time when the Hudson's Bay Company opened their first post at Chesterfield Inlet, there was a constant succession of trading posts opening up in various areas of the Keewatin such as: Tavani, Nueltin, Cape Fullerton, Padlei, Wager Bay and Bury Cove as well as most of the present-day communities.

X At various sites throughout the Keewatin the historic trading post buildings still stand. Hudson's Bay Company archives contain a wealth of information and pictures. Innumerable stories can be related about the fur trading days in the Keewatin.

f) Missionary Era

Both the Roman Catholic and Anglican churches have played major roles in the development of the Keewatin Region. This theme would involve the portrayal of the historic roles of both churches. The first Roman Catholic Mission was established at Chesterfield Inlet in 1912. In the 1970's Anglican Missions were set up in several locations. These missions played a major role in the settlement of the present day communities.

Information on the Missions would be available from a variety of sources including the church records.

g) Policing the North (R. C. M. P.)

The first R. C.M.P. post to be opened in the Keewatin Region was located at Cape Fullerton in 1903. This post was moved to Chesterfield Inlet in 1924 and a second detachment opened a post at Baker Lake in 1929. From that point on the R. C.M.P. played an increasingly important role in the development of the Keewatin Region.

h) Geographic/Scientific Exploration

In the 18th and 19th centuries individuals like ^{e.} Samuel Hearne, Dr. Rae and the Tyrell brothers were busy exploring and mapping ~~the~~ portions of the Keewatin Region. Scientific exploration began in the 1800's with the Fifth Thub Expedition. In the recent past, as in other Arctic areas, numerous scientific studies have been undertaken in different parts of the Keewatin. The various stories and historic sites related to these explorations could provide interesting material for interpretation.

i) Mining

The Rankin Inlet Nickel Mine, which opened in the early 1950's, was the first truly Arctic mine to operate in Canada. The mine was both a testing ground for mining and milling technology in a northern environment as well as to test the adaptability of the Eskimos to a southern working environment. The story of the mine itself and the problems it had to overcome as well as the problems and successes with Inuit labour make for interesting interpretation.

The operation of the modern Cullaton Lake Mine provides an opportunity to compare modern mining techniques with those of the past.

or Thule?

20205- Cultural Resource Opportunities

X The cultural resources of the Keewatin Region are made up of all the life skills, technologies, rituals and activities that make an Inuk ~~an~~ **Inuk**. Southerners have an endless fascination with the ways of the **Inuit** - especially with the way in which this race has learned to survive in the Arctic environment. Such life skills as igloo building, dog sledding and the making of animal skin clothing can be major tourist attractions if they are presented to the tourist in appropriately designed interpretive exhibits and demonstrations. Native crafts, foods, dancing and singing also are great attractions to a tourist, and some of the larger special events like the Keewatin Summer Games would certainly have potential as a tourist attraction.

However, these types of cultural resources exist to varying degrees in each of the communities so the tourism potential associated with the cultural resources is not necessarily community specific.

On a regional basis the major cultural resource opportunities can be summarized as follows:

- o the **Inuit** Cultural Institute is headquartered in Eskimo Point; **I.C.I.** is the agency with the prime responsibility for education, language, culture and history in the north.
- o there are numerous established artists throughout the Keewatin in the areas of carving and print making.
- o there are several well known musicians in the Keewatin including William Tagoona and Charlie **Panagoniak**.
- o each of the communities hold a number of annual events (i.e., **Christmas**, Easter, Hamlet Days and Canada Day) which could have certain tourist appeal in addition to the regional Keewatin Summer Games.
- o facets of the traditional **Inuit** culture are still evident in each of the communities.

2.3 Community **Specific** Tourism Resources

Community-based tourism is a term which describes a tourism industry focused on and around specific communities in an attempt to concentrate the economic benefits to the extent possible, in the communities. It is the policy of the Government of the Northwest Territories to encourage and support **community-**based tourism because of the remoteness and isolated nature of the Territorial communities.

In order to identify potential tourism development opportunities in each of the Keewatin communities it was important to obtain a clear understanding of the strengths and weaknesses of existing tourism resources, plant and infrastructure. This was accomplished by undertaking the following four phased work program:

- i) **The** first phase involved researching the potential tourism resources throughout the Keewatin Region utilizing existing data sources.
- ii) An inventory of the existing tourism superstructure (i.e. accommodation, food and beverage, and search and rescue facilities, community access etc.) was undertaken and the facilities and services were assessed in terms of their quality, condition and so on, while in the community.
- iii) Meetings were held with knowledgeable individuals/groups in each of the communities in order to identify—the sites and resources out on the land which might be of interest to tourists.
- iv) Trips were made out on the land in each of the communities, in all four seasons, to field check some of the resources.

In addition to providing us with the necessary resource inventory, this process was intended to help create an awareness among local residents regarding the types of things tourists might like to see and do in the Keewatin.

The following sections provide a summary of the tourism resources and potential in each of the Keewatin communities:

2.3.1- Baker Lake

Baker Lake, a community of approximately 954 people (1981 census), is located at the northwest end of Baker Lake near the mouth of the Thelon River. Two of the more unique geographic characteristics of Baker Lake are that it is located at the approximate geographic centre of Canada and that it is the N. W.T.'s only inland Inuit community.

i) Resources of the Land

The topography around Baker Lake can best be described as flat, rocky tundra. The lake itself is contained by a large sill at the head of Chesterfield Inlet. During the highest tides this sill is sometimes breached by the salt water which then forms a layer at the bottom of Baker Lake. Fresh water enters the lake by several major river systems including the **Thelon** and Kazan Rivers.

The more important resources of the land in the Baker Lake area, from a tourism perspective were mapped with the assistance of **various groups** and individuals in the community. These resources are illustrated on Drawing _____ and are documented and described in the following table.

The following points summarize some of the more important natural resource related opportunities in and around Baker Lake:

- o the rolling topography around Baker Lake affords spectacular views out across Baker Lake.
- o there are a number of very scenic locations and unusual features close to Baker Lake including:

Kazan Falls;
Thelon rapids;
 Prince River mouth;
 eastern islands; and
 the narrows leading to Chesterfield Inlet.

Inconsistent!

0 proximity to the **Thelon** Game Sanctuary provides opportunities for viewing:

muskox;
caribou;
birds and waterfowl; and
the treeline **anomaly** extending up the **Thelon** River.

0 there are abundant opportunities for trophy sport-fishing around Baker Lake (lake trout, **char**, and **grayling**).

0 the terrain around Baker **Lake** is well suited for three-wheeling in the summer.

0 there are numerous good berry-picking areas around the community (blueberries and bakeapples).

0 three major canoeing rivers terminate in Baker Lake including the **Kazan**, **Thelon** and Dubawnt river systems.

ii) Resources of the People

The barren grounds around Baker Lake were inhabited by a number of different prehistoric native cultures. The first to occupy the area were thought to have been Indians who ventured north of the treeline chasing after caribou and possibly bison. Following the Indian's disappearance from the barrens around 1500 B.C. were the Pre-Dorset caribou hunters (an **Inuit** culture). Approximately 800 B.C. the **Pre-Dorset** culture was replaced by the Dorset culture ^{which was} ~~who were~~ in turn replaced by the Thule **Inuit** culture around 1300 A. D.. The **Dorset Inuit** are thought to be the predecessors to the modern day Eskimos in the Baker Lake area. The historic and modern day **Inuit** of the Baker Lake area, often referred to as the Caribou **Inuit**, are distinguished from other **Inuit** groups by their almost total dependence on the caribou and by their inland hunting skills. The habitations of the prehistoric cultures and the historic Caribou **Inuit** were concentrated along the major river systems and remnants associated with these habitations are visible to this day in certain areas.

TABLE 2-8
 RESOURCES OF THE LAND
 BAKER LAKE

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
1	Thelon River mouth - terminus of the 800 km Hanbury/Thelon canoe route	Boat	5 min.	July/August	
2	First rapids	Boat	1 hr.	July/August	o relatively eas to navigate in a boat.
3	Second rapids - good fishing area	Boat	2-3 hrs.	July/August	,0 extremely dangerous and difficult to navigate by boat.
4	Ingilik Point - popular ice fishing area	Skidoo	1 hr.	May-early June	
5	Twin Rivers - popular ice fishing area	Skidoo	1½ hrs.	May-early June	
6	Prince River mouth - scenic area in the summer - location of historic trail	Boat	40 min.	July/August	
7	Soapstone deposit	Boat	2 hrs.	July/August	

TABLE 2-8
(Continued)

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comment
8	Scenic islands	Boat	3 hrs.	July/August	
9	Narrows - very scenic; resembles a fiord	Boat	3½ hrs.	July/August	
10	Kazan River mouth - terminus of 960 km canoe route - good spring fishing - Canada Geese nesting area	Boat Skidoo	1-2 hrs. 1½ hrs.	- spring fishing - summer sight-seeing	o Lake ice can cause problem with access in early summer
11	Kazan Falls - good fishing - very scenic	Boat Skidoo	4 hrs. 2 hrs.	July/August May	
12	Canada Geese Nesting Area - also some snow geese	Boat	1-1½ hrs.	Late June-Aug.	
13	Qikiktaujuq River mouth - good open water fishing	Boat	1 hr.	June/July	
14	Good ice fishing lake (trout)	Skidoo	1 hr.	May	
15	Good ice fishing lake	Skidoo	2½ hrs.	May	
16	Good open water fishing (lake trout, char)	Boat	1 day	July	
17	Good fishing lake (ice or open water)	Skidoo & walk	3 hrs.	July	

The first contact with white people in the Baker Lake area took place around 1761 when Captain Christopher of the Hudson's Bay Company explored Chesterfield Inlet and Baker Lake (actually naming Baker Lake after a director of the H. B.C.).

Following this, a few of the Baker Lake **Inuit** had some contact with whalers out on Hudson Bay. It wasn't until 1914 that the first trading post was set-up on Big Hips Island in Baker Lake by the H.B.C. In 1927 and 1930 the Anglican and Roman Catholic Missions (respectively) located in the **Baker** Lake area. One of the early Anglican mission buildings, built in 1932 is still standing today.

In 1915 the RCMP built a temporary base on Baker Lake followed by a permanent post at the present community site in 1930.

X The resultant extensive contact with white people greatly influenced the Inuit in terms of their culture, ideologies and lifestyles. By 1959 almost half of the areas ^X **Inuit** population had settled in the community of Baker Lake.

Today Baker Lake is one of the larger communities in the Keewatin and exhibits a diversity of cultural talents including artists, musicians, sewing ladies and craftsmen. A number of the major cultural resources in the community which would **potentially be** of interest to tourists include:

X the **Sanavik Coop** and Print Shop;
Paul Toolooktooks Traditional **Inuit** Tools and Games Store;
Miqsuvik Sewing Centre; and
the traditional Village Office.

X In addition to the cultural resources found in the community itself we also identified the major resources of the **people** (historical/cultural resources) in surrounding areas. Drawing [#] illustrates some of the major historical/cultural resources found around Baker Lake. Each resource is documented and further described in Table 2-9.

TABLE 2-9
 RESOURCES OF THE PEOPLE
 BAKER LAKE

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comment
1	Kuup Paangani Trail - hiking trail featuring paleo-eskimo and Thule house remnants	Boat	5 min.	July/August	
	Traditional Village - located at the start of the trail				
2	Siuraqtarvik Trail - hiking trail featuring Thule tent rings	Boat	5 min.	July/August	o open only during July and August
3	Kinnga'tuaq Trail - hiking trail featuring Thule tent rings	Taxi or on foot	5 min.-45 min. (to the trail)	July/August	
4	Akilasaaryuk Trail - hiking trail featuring a variety of historic sites	Foot	10 min. (to the trail)	July/August	
5	Old camp - graves - stone traps - tent rings	Boat	40 min.	July/August	
6	Old fishing marker	Boat & on Foot	2 hrs. ½ hr. walk	August	
7	Old fish markers - the way the boulders are positioned tells how long the fishing season is	Skidoo	4 hrs.	May	
		Skidoo	4 hrs.	May	

TABLE 2-9
(Continued)

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comment
8	Old camp - fox trap - tent rings	Boat & on Foot	1½ days	July/August	
9	Large shelters (presumed to be quite old)	Foot from Kazan Falls	2hrs walk from falls	July/August	
10	Tom Kudloos' fish camp	Boat	1 day	July/August	
11	Old camp or trading post - graves with muskets in them	Boat	3-4 hrs.	July/August	
12	Interesting stone deposit - very soft; used to be used by the Inuit to make paint by mixing with fish oil	Exact location unknown			

iii) Existing Tourism Facilities

It was important to assess the existing tourism plant and infrastructure in each of the Keewatin communities in order to determine suitability from a market expectation perspective. Table 2-10 _____ provides a listing of the tourism related facilities and services in Baker Lake.

The following provides a point form summary of the main strengths and weaknesses associated with Baker Lake's existing tourism plant.

- o' Baker Lake has some of the best tourism facilities in the Keewatin with two hotels (one **seasonal**), several coffee shops, a Hudson's Bay store, two craft shops, a print shop, a sewing centre and a new airport terminal.
- o During the summer months, particularly in mid-August when the barge comes in, it is sometimes difficult to get a hotel room. From a tourism perspective this problem is accentuated because the construction/work crews are longer term customers than tourists, and "they normally pay the hotel rack rates.
- o There is an urgent need for transient type facilities catering to the canoeists who end up in Baker Lake. Typical services that the canoeists look for include:
 - a campground;
 - showers; and
 - a restaurant,
- o La Ronge Aviation have a float plane based in Baker Lake throughout the summer months, offering opportunity for short-term charters.
- o Search and rescue capabilities in Baker Lake are better than most of the other Keewatin communities. Both the La Ronge float plane and a helicopter (usually based by either D. I. A.N.D. or mining companies) are normally operating out of the community throughout the summer months.

TABLE 2-10

TOURISM PLANT AND COMMUNITY RESOURCES
BAKER LAKE

Resource	Characteristics	Other Comment:
Airport Terminal Building	o new building with offices, washrooms (accessible to handicapped) ticket sales area , and baggage claim area (decorated with local Inuit art).	
Taxi Operation	o truck with a built on cab (\$7 one way)	
Iglu Hotel	<ul style="list-style-type: none"> o 20 rooms in total -2 taken up by cook and wife, 1 by manager, 1 by maintenance man 0 used to rent to managers house 0 40 beds available now; financial break-even is just over 2596 (12 beds) - last year averaged 7% occupancy 0 pool room, T.V. room, restaurant 0 coffee shop trying to cater to the local market; sell fast food; expanding this year to include a video game room 0 \$120/night with meals, \$80 without 	o owned by Nunavut Corporation
Baker Lake Lodge	<ul style="list-style-type: none"> o 5 cabins to accommodate 20 people 0 central kitchen and bathhouse 0 open June, July, August, September 0 flexible meal hours; will provide box lunches 0 \$70/day with meals 0 also run an expediting business 0 thinking of developing a campground beside the lodge; using the common shower building 0 offer free van pick-up service 	<ul style="list-style-type: none"> o Used to be run in conjunction with the Chantry Inlet Lodge. o The C.I. Lodge only uses the Baker Lake Lodge if they are weathered in Baker Lake o will be replacing the kitchen next year

TABLE 2-10

(Continued)

Resource	Characteristics	Other Comment:
X Sanavik Coop	<ul style="list-style-type: none"> o sell carvings and prints o will allow tourists into the print shop but can't take pictures 	
Paul Toolooktook's Traditional Inuit Tools and Games Store	<ul style="list-style-type: none"> o makes and sells traditional tools and games 	
Miqsuvik Sewing Centre	<ul style="list-style-type: none"> o make and sell wall hangings, parkas, traditional clothing 	<ul style="list-style-type: none"> o Government owned Operati
Traditional Village	<ul style="list-style-type: none"> o traditional skin tent and implements/equipment on display at the mouth of the Thelon River, with interpretation provided by a family in traditional dress 	
Baker Lake Historic Trails	<ul style="list-style-type: none"> o 4 historic trails with interpretive brochures and signage, two of which are accessible by road or on foot from the community and two of which . . . <i>yo?</i> 	
Special Events	<ul style="list-style-type: none"> o Hamlet Days -2-3 days in early May o Christmas, New Years o Easter -2-3 days o Canada Day (new this year) 	<ul style="list-style-type: none"> Games, races etc
Community Hall	<ul style="list-style-type: none"> o dances o square dances o bingos o day-care Monday - Friday 	<ul style="list-style-type: none"> (rents for about \$50/night)
Communications	<ul style="list-style-type: none"> o local T.V. and radio 	
Alcohol	<ul style="list-style-type: none"> o controlled 	

TABLE 2-10

(Continued)

Resource	Characteristics	Other Comments
Nancy Sevoga	o runs fast food operation in her house	
Martha Nukik	0 caribou clothing industry	
Joe Mautaritnaak	0 translating and interpreting	
Womans Group Store	0 store and coffee shop	
Nirivik	0 coffee shop with video game room	
Airport Runway	0 1280 m x 45 m gravel runway; suitable for H.S. 748	
Hockey Arena	0 spring instant structure 0 holes appearing in the material after the first winter 0 plans to build a rink inside and an exterior protective wall	
Churches	0 Roman Catholic 0 Anglican 0 Christian Arctic Fellowship Church 0 Bakar	
La Ronge Aviation Services Ltd.	0 sum mer float plane base	

2.3.2- Chesterfield Inlet

Chesterfield Inlet, a community of approximately 249 people (1981 census) is located on the western shores of Hudson Bay just south of Chesterfield Inlet. **Because of** its strategic position with respect to ships entering Hudson Bay below Southampton Island, Chesterfield became a major transportation and distribution **centre** for western Hudson Bay in the early 1900's.

i) **Resources of the Land**

Chesterfield Inlet is situated in a low sandy/gravelly bay facing south, surrounded by low granite outcrops. The surrounding area is very rocky and dotted with small lakes. The rough rocky nature of the terrain makes three wheeler travel very difficult for any considerable distance. Although the Hudson Bay coast adjacent to Chesterfield is very susceptible to strong winds and big waves restricting travel, the mouth of Chesterfield Inlet just north of the community is dotted with islands and reefs providing relatively sheltered boating routes in behind.

The resources of the land found in the Chesterfield area were identified with the help of local hunters and other community residents. The most interesting resources of the land from a tourism perspective are illustrated on Drawing ? and documented on Table 2-11.

The following provides a point form summary of some of the more important opportunities associated with the natural resources in the Chesterfield area.

- o there are a number of good char fishing lakes about a half days travel from the community.
- o there are a lot of caribou, year-round, in the area north of Chesterfield Inlet, providing potential opportunities for viewing and possibly sport hunting.

TABLE 2-11
 RESOURCES OF THE LAND
 CHESTERFIELD INLET

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comment
1	Fishing lakes - first is the water lake - second is the best for fishing	Honda	½ hr. to second lake	July	
2	Checkers Lake - good fishing	difficult to get to			
3	Kanuk Lake good fishing	difficult to get to			
4	Lots of black guillemots	Boat	45 min.	July/August	
5	Ring seals commonly seen all through this area in the summer	Boat	varies	July/August	
6	Char fishing lakes				
7	Summer fishing area - netting area in late summer or fall	Boat	2 hrs.	July/August	
8	Good char fishing lake	Skidoo	3-4 hrs.	May	
9	Fishing lakes - middle one is called Qungaliq	Boat	2 hrs.	July/August	

TABLE 2-11
(Continued)

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
10	Lots of caribou	Boat	2 hrs.	July/August	o dependent on weather
11	Area where bearded seal are commonly found	Boat	2 hrs.	July/August	
12	Savajuaq Lake - very scenic - falcon cliffs on the way in	Boat	2 hrs.	landlocked(?)	o this is an inland salt water lake
13	Good fishing area	Boat	6-8 hrs.	July	
14	Lots of caribou and wolves	Boat or Skidoo	6-8 hrs.	Spring or Summer	
15	Whales often come into the bay	visible from the community		mid-late August	

- 0 **beluga** whales and the **whale** hunts following their sighting can be viewed from the community during the latter half of August.
- o the relatively sheltered water route between Chesterfield Inlet and Baker Lake may provide opportunity for boat trips between the two communities.
- o the **Savajuaq** Lake area is very scenic and is somewhat unique in that **it** is an inland salt-water lake; the **biophysical** resources in the **Savajuaq** Lake area have been extensively studied by the Department of Fisheries and Oceans.

ii) Resources of the People

The coastline along the west side of Hudson Bay is dotted with the remnants of prehistoric **Inuit** habitations. The visible remains of **semi-**subterranean houses, tent rings, caches, fox traps and kayak stands can be found in a number of areas.

The first outside interest in the Chesterfield Inlet area occurred as early as the 17th century when it was **felt** that the Northwest Passage to the Orient might be found leading out of Hudson **Bay**. A number of explorers including the likes of Captain Foxe and Middleton and Sir Thomas Button explored the Chesterfield Inlet area **feeling** that it might lead to the Northwest Passage.

A lot of whaling activity occurred along the west coast of Hudson Bay close to Chesterfield, and the local **Inuit** began to trade with the whalers in the 19th century.

In 1903 the RCMP set up their first post at Cape Fullerton which also doubled as a whaler wintering area.

In 1912 the Roman Catholic Mission was founded in Chesterfield Inlet and the **Hudson Bay** Company opened a trading post which eventually developed into a distribution point for the other **Keewatin** posts.

Over the years the Roman Catholic Mission expanded to include a hospital, a school and a senior citizens home. Today the Mission only runs a hospital for severely retarded and handicapped **Inuit** women.

The community of Chesterfield Inlet, today, is a small, quiet and relatively traditional community.

Some of the major cultural attractions from a tourism standpoint in the community include:

the Roman Catholic Mission and some of the historic buildings like the old church and the generating station.

X - the **Hudson Bay** building which has been there since 1914.

Drawing ? provides an illustration of the resources of the people which were identified with the help of local residents. Each resource is documented on the accompanying Table 2-12.

iii) Existing Tourism Facilities

The following Table 2-13 provides a listing of the tourism related facilities and services found in Chesterfield **Inlet**.

X The major strengths and weaknesses associated with Chesterfield Inlet's existing tourism plant can be summarized as follows:

- o for a small community Chesterfield Inlet has a good quality hotel.
- o there is a lack of local craft items available in the community.
- o there are very few community functions such as dances or bingos other than during special events celebrations.

TABLE 2-12
 RESOURCES OF THE PEOPLE
 CHESTERFIELD INLET

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
1	Old camp tent rings - fox traps - food caches - kayak stand	Honda or walking	5 min.	July/August	○ located on the first point beyond the community
2	Old fox trap	Boat	5 min.	July/August	
3	Man-made channel - passable in high tide	Boat	2 hrs.	July/August	
4	Abandoned fisheries and oceans research camp	Boat	2 hrs.	July/August	○ will supposedly be using it again in 5 years time
5	Old Whaling Boat - owned by Mark Papak's grandfather	Boat	2 hrs.	Jul A g u t	
6	Old camp area - food caches - fish weir tent rings	Boat	2 hrs.	July/August	○ located at a river mouth
7	Sailors graves	Boat	2½-3 hrs.	July/August	○ Depot Island an old whaler wintering site

TABLE 2-12
(Continued)

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For visiting Resource (Season, Month)	Other Comment
8	Old blubber pot	Boat	2½-3 hrs.	July/August	
9	Old fish cannery from the 60's - only thing left is the cement pad	Boat	3-3½ hrs.	July/August	
10	Cabin	Boat	6-8 hrs.	July/August	o still used
11	Abandoned Siniktarvik Fish Camp	Boat	6-8 hrs.	July/August	
12	Old RCMP Post	Boat	6-8 hrs.	July/August	,0 this was the first RCMP p in the Keewal as well as a whaler winter site
13	Hunting Cabin old Thule house remains	Boat	2 hrs.	July/August	

TABLE 2-13

TOURISM PLANT AND COMMUNITY RESOURCES
CHESTERFIELD INLET

Resource	Characteristics	Other Comments
X Igalaaq Hotel	0 one year old on top of the Co-op store 0 4 rooms, 3 beds each; T.V. and clock radio in each room (shared washroom) 0 dining area to seat 16; also used as the community coffee shop during the day 0 laundry facilities	
X Pitsiulak Co-op	0 sells both food and dry goods - no carvings or local crafts	
X Hudson Bay	0 original store which was built in 1914 0 some old tools upstairs 0 sells both food and clothing and other dry goods	
Special Events	0 Hamlet Day - April 1-2 days of games 0 Easter 0 Christmas and New Years 0 July 1	
Outfitter	0 Mark Papak - fishing and sightseeing trips - \$125/day	
Roman Catholic Mission	0 historical attraction 0 several interesting old buildings associated with the Mission	
Taxi	0 truck; planning to buy a van 0 owned by L & C Enterprises	
L & C Enterprise Store	0 small store and pinball room	

TABLE 2-13

(Continued)

Resource	Characteristics	Other Comment
Swim ming Pool	o portable swimming pool which is set up in the parking garage (June 1- end of August)	
Communications	o local radio station	
Airport Terminal	o M.O.T. will be building a terminal this summer	
Bombardier Taxi	o runs between Rankin and Chesterfield (\$40) owned and operated by Leo Kahudjak	

2.3.3- Coral **Harbour**

The Hamlet of Coral **Harbour** is the only community found on Southampton Island in the north end of Hudson Bay. In 1981 the population of Coral **Harbour** numbered 429 comprised predominantly of people of **Inuit** ancestry (93%). Because of the community's strategic position in the middle of Hudson Bay, a person can access the community just as easily from the Baffin Region as from the Keewatin Region.

i) Resources of the Land

Coral **Harbour** is situated at the head of South Bay at the south end of Southampton Island. The area around the community is very flat and sandy with numerous bedrock outcrops and bedrock ridges near the Hudson Bay shoreline.

The resources of the land around Coral **Harbour** were mapped with the assistance of various groups and individuals in the community and are illustrated on Drawing No. ? and described in the following table.

The major natural resource related opportunities and constraints are summarized by the following points:

- o The Coats Island area (including Walrus and Bencas Islands), accessible by boat (Peterhead) in one day if the weather is good provides excellent opportunities to view:

- walrus;
- polar bear;
- sea birds; and

- X - spectacular scenery.

- o The northeastern side of Southampton Island is very mountainous, with steep cliffs rising out of the seas, and scenic but the area is very difficult to access.

TABLE 2-14
 RESOURCES OF THE LAND
 CORAL HARBOUR

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other	Comment
1	Kirchoffel River Falls - falcons commonly seen on cliffs on the way in	Boat Honda Skidoo	½ hour	July/August July/August May		
2	Good fishing area	Boat Skidoo	1 hour	July/August May		
3	Walrus commonly found here in the summer - sometimes polar bears as well - lots of guillemots	Boat	5 hours	July/August		
4	Bencas Island - traditional walrus haul-out areas - common to see polar bears - fox denning area - protected harbour	Boat	1 day	July/August		
	Small island often covered with walrus	Boat	1 day	July/August		
	Murre colony on the side of a high cliff	Boat	1 day	July/August		

TABLE 2-14
(Continued)

RESOURCES OF THE LAND
CORAL HARBOUR

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other	Comments
7	Sand beach areas	Boat	1 day	July/August		
8	Walrus haul-out areas	Boat	1 day	July/August		
9	Lots of geese in the spring	Skidoo		June		

- o The terrain around Coral Harbour is very flat and well suited to three wheeling; several interesting destinations, including the **Kirchoffel** River falls and the "mountains" (local terminology for the nearby hills to the east), are accessible by three wheeler.
- o The two bird sanctuaries located on Southampton Island (Harry Gibbons and East Bay) are very difficult to access by land.

ii) Resources of the People

X
? X
The Coral Harbour area was originally inhabited by a tribe known as the **Sallirmiut Inuit**. This group was distinct from other tribes in the Keewatin because of their close similarities to the **Thule** culture. The **Sallirmiut** were characterized by their stone, whalebone and turf houses and their use of bearskin clothing and flint-headed weapons. In the mid-1800's the whaling industry was flourishing in Hudson Bay. ~~By~~ 1899 almost all of the **Sallirmiut Inuit** perished from a disease introduced by the whalers. Following this major tragedy, the area was repopulated by **Aivilingmiut Inuit** from the ~~Wager~~ Bay and Repulse Bay areas, who were brought to the area by the whalers.

In 1924 the Hudson's Bay Company transferred their post from Coates Island to the present day community of Coral Harbour. During World War II the RCAF and USAF joined efforts to build a large aircraft facility at Coral Harbour. "The airfield base was taken over by MOT who are continuing to run the airfield and weather station facilities today.

Today Coral Harbour is a community that still relies heavily on hunting and fishing as a form of livelihood. There is a very small arts and crafts industry in Coral Harbour with only a few carvers and a small ladies sewing group.

TABLE 2-15
RESOURCES OF THE PEOPLE
CORAL HARBOUR

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other	Comments
1	Old camp at Native Point	Boat	2 hrs.	July/August		
2	Old camp at Ruin Point	Boat	2 hrs.	July/August		
3	Old camp at Walrus Island	Boat	5 hrs.	July/August		

iii) Existing Tourism Facilities

The following table 2-16 provides a listing of the tourism related facilities and services in Coral **Harbour**.

The following provides a point form summary of the main strengths and weaknesses associated with Coral **Harbour's** existing tourism plant:

- o The hotel needs to be upgraded with provision of showers and washroom facilities in each room (this has been started already).
- o The limited size of the hotel may lead to potential conflicts between work crews and government travelers and tourists.
- o The taxi service is undependable.
- o The lack of a terminal building for visitors at the airport is a definite constraint.

TABLE 2-16

TOURISM PLANT AND COMMUNITY RESOURCES

CORAL HARBOUR

Resource	Characteristics	Other Comment!
Esungarq Hotel	o owned by the Co-op	o great food
	0 4 rooms; 2 with 2 beds each, 2 with 3 beds each	
	0 individual washrooms (honey buckets) - showers in rooms not hooked up	
	0 tv in living room	
	0 \$95.00	
Corn munity Hall	0 in good shape	
Taxi	0 bombadier in winter and van or half-ton in the summer to and from the airport	0 not always available
Airport	0 no terminal building; 12 miles from community	
	0 site of MOT base	
	0 bar is used for waiting passengers	
Co-op	0 food and dry goods	
	0 no carvings	

metric?

A

TABLE 2-16

(Continued)

TOURISM PLANT AND COMMUNITY RESOURCES

CORAL HARBOUR

Resource	Characteristics	Other Comment
Hudson% Bay Store	o food and dry goods	
Churches	<ul style="list-style-type: none"> o Anglican 0 Roman Catholic 0 Glad Tidings 	
Outfitters	<ul style="list-style-type: none"> 0 Raymond Ningeocheak) 0 Guy Enuapik) have a Peterhead 	<ul style="list-style-type: none"> o interested in running trips to Coats Island
Special Events	<ul style="list-style-type: none"> o Hamlet Days (August) 0 Canada Day 0 Christmas and New Years 0 Easter 	

2.3.4- Eskimo Point

TABLE _____
 RESOURCES OF THE LAND
 ESKIMO POINT

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comment
1.	Beluga whale sightings	Boat	½ hr.	late August	Seen in deep wa
2.	Polar bear sightings	Boat	½ hr.	Sept./Oct.	Seen in commur
3.	Maguse River Rapids	Boat	2 hrs.	July/August	o Boat to travel high tide o Lots of minor rapids
4.	Char and Grayling fishing/wildlife route	Boat	2 hrs.	June/July	o Boat to trave high tide o Lots of mine] rapids
5.	Caribou herds	Skidoo (April) Boat (August/September)	Varies	o April when migrating towards calving grounds o August/Sept. when migrating south	
6.	McConnell Bird Sanctuary	Boat	2 days	August	Easy to get stuc tidal flats

great for
↓

TABLE _____
 RESOURCES OF THE LAND
 ESKIMO POINT

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
7.	Scenic area, many rapids	Boat	2½ days	July/August	
8.	X Expensive tidal flats, slow impact of isostatic readjustment - Wolf River	Three-wheeler	½ hr.	July/August	Source of fresh water for some residents

TABLE _____
 RESOURCES OF THE PEOPLE
 ESKIMO POINT

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For visiting Resource (Season, Month)	Other Comments
1.	Eskimo Point Historic Sites - R.C. Museum, Anglican Museum, I.C.I.	Hike	in-community	All year	Needs extensive interpretation
2.	Sentry Island tent rings, house rem sins, kayak stands	Boat	45 min.	July, early August	Lots of birds
3.	Upper Cape Eskimo tent rings, graves	Boat Three-wheeler	15 min. 1 hr.	July/August	Good site for sh lunch and trip to Sentry Island
4.	X Svik-abundant remains of tent rings, cairns, Inuksu ^h ks	Boat Three-wheeler,	1/2 days 1 day	July/August	
5.	g 1/2 Mayne River mouth and river route - very of historic and contemporary sites, 1 HBC post	Boat	2 hrs.	July/August	Part of larger the me
6.	Pudli - old HBC post	Boat	1 day	July/August	Part of larger theme
7.	Qikiktaarjuk hiking trail	Hiking	varies	July/August	o under construction o cairns/markers o brochures

TABLE _____

TOURISM PLANT AND COMMUNITY RESOURCES

ESKIMO POINT

Resource	Characteristics (Description, access, condition, operating season, use, costs, quality, etc.)	Other Comment
Tugalik Inn	<ul style="list-style-type: none"> o 10 rooms, 8 with 2 beds, 2 with 3 beds o Dining room in separate building o Good food, but no selection/choice o VCR rental system with HBC o Laundry facilities o Excellent service and facilities o \$70 single; \$75 double; Meals: Dinner/Supper \$14, Lunch \$12, Breakfast \$8 full; \$3 continental o Cafe/Coffe Shop attached - somewhat slum my 	<ul style="list-style-type: none"> o Could benefit from common room /lounge o Planning to bu extension ontc front of hotel for dining and lounge
The Bay	<ul style="list-style-type: none"> o Large, well stocked store; o DST goods and groceries "" o No crafts/art 	
Co-op	<ul style="list-style-type: none"> o \$500000 in the red o Just trying to fix up store - was a real mess o Carry very few craft goods; planning to deal in inexpensive crafts - e.g. \$2-dolls (bone) o No plans for future except recovery 	<ul style="list-style-type: none"> o Tends to duplicate Bay' merchandise o Trying to stop this merchandising method
Mark's Mini Mart	<ul style="list-style-type: none"> o Like a convenience store - odds and ends 	
Confectionery		

TABLE _____

(continued)

TOURISM PLANT AND COMMUNITY RESOURCES

ESKIMO POINT

Resource	Characteristics (Description, access, condition, operating season, use, costs, quality, etc.)	Other Comments
Seaside Tea Room	<ul style="list-style-type: none"> o Pretty slum my; potential for improvement; nice location overlooking the Bay 0 Owned by Mark Kalluak's wife 	
Don's Sales & Services	<ul style="list-style-type: none"> o Skidoos/hondas and sales and repairs o Hamlet tours 	
Inuit Images	<ul style="list-style-type: none"> o Operated by Simonie Baker} 0 Probably closed in summer '84 for Simonie to have baby 0 Sells souvenirs/post cards, etc. 	
Craft Shop	<ul style="list-style-type: none"> o Owned by Dion Furs 0 Operated by Terry Lancaster 0 Well operated; full of merchandise 	<ul style="list-style-type: none"> o Nothing terribly exciting o Best stuff gets sent down south
Museum	<ul style="list-style-type: none"> 0 To be built by summer Hamlet/C of C project 0 In old Catholic Church (now boarded up) 0 Nice location along Bay shore and beside tea room 	
ICI	<ul style="list-style-type: none"> 0 Nice building 0 In the past have shown slide shows for tourists 	

TABLE _____

(continued)

TOURISM PLANT AND COMMUNITY RESOURCES

ESKIMO POINT

Resource	Characteristics (Description, access, condition, operating season, use, costs , quality, etc.)	Other Comment
2 Longliners		
13 Dog Teams		
3 Outfitters Licenses	o Luke Suluk , Don Baker, Mark Kalluak , Guy Alikut	

TABLE ____
 RESOURCES OF THE LAND
 RANKIN INLET

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For visiting Resource (Season, Month)	Other Comments
1	Beluga whales	Boat	1 hr.	late August	
2.	Peter Lake	Plane/Honda	½ hr.	June April/May	
3.	Char Lake/Diana River	Honda	1 hr.	July/August April/May	
	Char Lake/Diana River	Boat	½ hr.	July/August	to Diana River
4.	Marble Island Quartzite Island	Boat	4 hr.	July/August	
5.	Marble Island polar bear sightings	Boat	4 hr.	August/Sept.	
6.	Barrier Island coastal scenery	Boat	½ hr.	July/August	
7.	Barrier Island cod fishing	Boat	½ hr.	July/August	
8.	Pangertot Peninsula Barrenlands/coastal topography	Boat/Honda/Hike	4 hrs. - overnight	July/August	

TABLE _____
 RESOURCES OF THE LAND
 ESKIMO POINT

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For visiting Resource (Season, Month)	Other Comments
6.	McConnell Bird Sanctuary	Boat	2 days	August	Easy to get stud tidal flats
7.	Scenic area, many rapids	Boat	2½ days	July/August	
8.	Expensive tidal flats, slow impact of isostatic readjustment - Wolf River	Three-wheeler	½ hr.	July/August	Source of fresh water for some residents

2.3.5- **Rankin** Inlet

TABLE _____
 RESOURCES OF THE PEOPLE
 RANKIN INLET

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
1.	X Marble Island ^{upper case} (by) night's expedition	Boat	4 hrs.	July/August	
2.	Marble Island whaling era relics	Boat	4 hr..	July/August	
3.	Meliadine River Christian graves at mould	Honda	1 hr.	July/August	
4.	Meliadine River tenting., kayak stands	Honda	1 hr.	J u l y / A u g u s t	
5.	Meliadine River historic feature	Honda	1 hr.	July/August	
6.	Rankin Inlet mine First mine in the Keewatin	Foot	½ hr.	June-Sept.	
7.	Diana River archaeological sites	Honda	2 hrs.	July/August	

TABLE _____

TOURISM PLANT AND COMMUNITY RESOURCES

RANKIN INLET

Resource	Characteristics (Description, access, condition, operating season, use, costs, quality, etc.)	Other Comment
o	60 bed hotel; excellent dining room (good food but limited selection and very restricted hours; lounge; bar (limited hours - 8-12) -1 wing closed winter.	
0	1 good restaurant - Tundra Steak House - good food but expensive.	
0	2 coffee shops (ASA with movies nightly & Anabs)!	
0	Huge school with gymnasium and shop and library/research centre.	
0	Research institute (used for hotel overflow) - University of Saskatoon Arctic Research and Training Centre	
0	High school soon to be built.	
0	ASA video store and carving outlet - plans to build satellite dish for 24 TV channels.	
0	Craft shop (mostly serving goods).	
0	Bed and breakfast (plans for extension to 5 rooms); now 2 rooms.	
0	Bay stores (food mart and dry goods)	
0	Co-op store (groceries).	
0	Yvo's - rents out 3-wheelers and boats.	
0	JP& H - rents out 3-wheelers.	
0	Airstrip and terminal.	

TABLE ____

(continued)

TOURISM PLANT AND COMMUNITY RESOURCES

RANKIN INLET

Resource	Characteristics (Description, access, condition, operating season, use, costs, quality, etc.)	Other Comments
o Recreation hall (another being developed).		
0 Bank of Commerce.		
0 Fish plant.		

2.3.6- Repulse Bay

Repulse Bay is a small community of 352 (1981 Census) people located north of Southampton Island on the south shores of Melville Peninsula. The community is situated on the Arctic Circle.

i) Resources of the Land

Repulse Bay is one of the more scenic communities in the Keewatin. The area is characterized by hilly bedrock terrain dissected by river valleys and inlets carved in from the sea. Islands dot the coastline out in front of Repulse Bay.

Drawing No. _____ illustrates the more interesting resources of the land in and around Repulse Bay. The following table _____ provides the corresponding explanation of the individual resources.

The major opportunities and constraints related to the resources of the land in and around Repulse Bay are as follows:

- o The topography around Repulse Bay is very hilly and the coastline is characterized by long steep walled inlets and numerous islands creating a more striking setting than the other Keewatin communities.
- X o During the month of August ^abeluga whales and sometimes ⁿnarwhals ^(f) can be sighted out in front of the community.
- o Caribou are abundant around Repulse Bay and are easily viewed in the spring and summer.
- o The hilly terrain dotted with small lakes and broken up valleys and ocean inlets provides some potential for outdoor activities such as cross-country skiing and hiking; however, the nature of the terrain makes three wheeling quite difficult.

TABLE _____
 RESOURCES OF THE LAND
 REPULSE BAY

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
1	Whales - narwale and beluga commonly seen	From community		August	
	Supojato - water falls - common net fishing area	Boat	1½ hrs.	July/August	
3	Scenic creek - gyrfalcons commonly seen here	Boat	1 hr.	July/August	
4	Fishing lake	Honda	1 hr.	July/August	
5	Lyon Inlet - very scenic area in the summer	Boat		July/August	
6	Numerous good fishing lakes	Boat and walking	1 day	July/August	
	Good fishing	Boat and walking	1 day		

TABLE _____
 (continued)
 RESOURCES OF THE LAND
 REPULSE BAY

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
8	Very scenic bay - walrus and narwhale commonly seen here	Boat	1 day	July/August	
	Very scenic sheltered natural cove	Boat	4-6 hrs.	July/August	o provides halfw anchorage on route to Wager Bay
10	Wager Bay mouth - strong currents polynia in the winter	Boat	1 day	July/August	
11	Good ice fishing	Skidoo	1 day	May	
12	Lots of caribou can be seen in this area	Skidoo	2-3 hrs.	May	

X 0 Repulse Bay is the closest community to Wager^r Bay which provides excellent opportunities for: .

viewing wildlife including caribou, polar bears, whales, sea birds and ducks;

X - viewing spectacular scenery;

hiking;

interpretation of unique physiographic features such as:

reversing falls;

- tidal bores; and

- polynias.

sport fishing, particularly in the spring.

ii) Resources of the People

X In the 18th century the Inuit in the Repulse Bay area had their first introduction to whites when explorers' like Captains Middleton and Moore first ventured to the area. During the 1800's the Hudson Bay whaling era began and Repulse Bay was utilized as a wintering site. It ~~was~~^{is} interesting to note that large numbers of Inuit used to gather and camp around the wintering whaling ships off the coast in the Harbour Islands. The whalers wintering in Repulse Bay attracted Eskimos from as far away as Iglookik, Pelly Bay and Chesterfield Inlet. Reminders of the whaling era still exist on the Harbour Islands in the form of graves and writings on the rock.

In 1953 Dr. Rae used Repulse Bay as his base from which to survey the Boothia Peninsula. Part of Dr. Rae's stone house still stands about north of the North Pole River. ?

In 1916 the Hudson Bay Company established a trading post at Repulse Bay with the Revillon Freres following in 1923.

~~X~~ Around the same time the ⁵⁻Hudson Bay Company operated a trading post in ~~X~~ ~~Wager~~ Bay near Brown's Lake which still stands today.

The present permanent settlement at Repulse Bay started in the 1960's with the provision of housing and schooling. Today the community is well known for its carving, particularly small ivory pieces.

The following table ___ along with Drawing No. ? _ provides an indication of the resources of the people found in the Repulse Bay area.

--

--

TABLE ____
 RESOURCES OF THE PEOPLE
 REPULSE BAY

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comment
1	Naujaat Thule house remains - semi-subterranean dwellings	Walking	40 min.	July/August	
2	Old whaling station - several sailors' graves - rock engravings	Boat	½ hr.	July/August	o the Harbour Islands were a common winter whaling site
3	Dr. Rae's stone house remains	Boat Skidoo	1 hr. 1 hr.	July/August May	
4	Old Inuit camp	Boat	40 min.	July/August	
5	Summer cabin	Boat	1 hr.	July/August	o still used
6	Hunting cabin - owned by Joani and Laurent Kringayark	Skidoo	3-4 hrs.	May	o good ice fishing and caribou hunting area
7	Old camp - Inuit and white people	Boat	1 day	July/August	

TABLE _____
 (continued)
 RESOURCES OF THE PEOPLE
 REPULSE BAY

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comment
8	Old camp	Boat	1 day	July/August	
9	Outpost camp	Boat Skidoo	5-6 hrs. 5-6 hrs.	July/August May	

iii) Existing Tourism Facilities

The following table provides a listing of the tourism related facilities and services found in Repulse Bay.

The major strengths and weaknesses associated with the tourism plant can be summarized as follows:

- X 0 With the ~~hotel~~ ^o in Repulse Bay there should be little conflict between work crews and tourists.
- o The carving display at the ~~Co-op~~ is well presented.
- o The lack of a large Peterhead type boat in the community provides a constraint for traveling to any distant destinations like Vansittart Island or ~~Wogey~~ ^{Wogey} Bay.

TABLE _____

TOURISM PLANT AND COMMUNITY RESOURCES

REPULSE BAY

Resource	Characteristics	Other Comment
Transient Centre	o owned and operated by the Co-op	
	o no cooking provided	
	o 4 rooms with 2 beds	
	o 1 room with 1 bed	
	o 5 shared washrooms	
Churches	o Anglican	
	o Roman Catholic	
	o Glad Tidings	
Keewatin Northern Lights Outfitting	o complete outfitting services	o Parks Canada contract this summer in Wager Bay
		o possibly a wildlife service contract for Vansittart Island
Co-op Store	o food and dry goods, good selection of fresh fruit and vegetables	
	o good carving display	

TABLE _____

(continued)

TOURISM PLANT AND COMMUNITY RESOURCES

REPULSE BAY

Resource	Characteristics	Other Comments
Hudson's Bay Store	o food and dry goods	
Airport Terminal	o small with washrooms 0 no taxi service	
Aivillik Hotel	o Bill Crawford has purchased the old R.C. Mission 0 will convert to a hotel with restaurant and 11 rooms with 2 to a room	
Sports Hunts	o run with Jerome Knapp for both polar bear and caribou 0 arranged through the H.T. A.	o two polar bear hunters this year did not get bears (one Germany and one from the States)
Community Hall	o in good shape 0 local band for dances 0 once the community gets their new Hamlet complex they will use the hall for a swimming pool which is now housed in the garage	

TABLE _____

(continued)

TOURISM PLANT AND COMMUNITY RESOURCES

REPULSE BAY

Resource	Characteristics	Other Comments
Coffee Shop	<ul style="list-style-type: none"><li data-bbox="970 553 1561 586">o fast food, video games and pool table<li data-bbox="970 618 1561 651">o in fairly good condition	

2.3.7- Whale Cove

Whale Cove is a small community of approximately 188 people (1981 Census) located on a peninsula between Rankin Inlet and Eskimo Point. Whale Cove, when it was settled in 1959 was not a natural community like most of the other Keewatin communities. It was the result of a government project to relocate families from distant island areas experiencing famine.

i) **Resources** of the Land

Whale Cove is situated on a south facing sheltered cove at the end of a long peninsula lying north of Wilson Bay. The community itself **was** developed on an old lake bed surrounded by high rock outcrops. Because of its position in the old lake bed the lower areas in town are **subject to** flooding during wet periods. The airport situated some 5 or 6 miles **from** the community is located in an area of flatter tundra topography dotted with small lakes and rock outcrops. metric.

The following points summarize some of the more important natural resource related opportunities and constraints as identified through community group meetings. The resources of the land are illustrated on Drawing No. ? and described in table :

- o The topography right around the community is quite hilly and rocky providing a fairly striking setting; however, the area up behind the community is scattered with garbage and machine wrecks which distracts from the **areas** scenic attractions.
- o There are several good fishing lakes close to the community that can be accessed by honda or walking.
- o During the month of August **beluga** whales can often be sighted out in Whale Cove.
- o Wilson Bay provides opportunity-f or relatively sheltered boating.

TABLE _____
 RESOURCES OF THE LAND
 WHALE COVE

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
1	Water lake ^{upper case?} lake, good spot for fishing (land locked char)	Walking	½ hr.	July/August	
	Whales are commonly seen in this area	Boat	5 min.	late August	
	Good fishing area - by net - rodding would be best in Whiterock Lake	Boat	1 ½ hrs.	late June/July/August	
4	Good char fishing area	Boat	2 hrs.	late June/July/August	
5	Lots of seals	Boat	varies		
6	Ferguson River - good fishing areas - scenic canyon and rapids - potential canoe route	Boat	½ day	July/August	o can get all the way to Kaminak Lake by canoe

0 The Ferguson River which is accessible by boat (half day trip) from Whale Cove is an interesting resource providing opportunity for spring fishing and scenic river boating in the summer.

ii) Resources of the People

The Whale Cove area was reached by explorers as early as the 17th century. In the 1800's the Hudson's Bay Company opened a trading post at **Tavani** just south of Whale Cove. The buildings at **Tavani** can still be seen today.

Throughout the exploration and trading years, the present day community location was not a natural centre as was the case with most other Keewatin communities. It was not until 1959 that a permanent settlement was established at Whale Cove. At that time the government began to relocate families from some of the famine ridden inland areas in an attempt to introduce them to subsistence based on coastal resources. In time these families were joined by families from the Baker Lake area, Eskimo Point area and from Rankin Inlet when the mine closed down.

Today the community is a small relatively traditional community with a very strong hunting and fishing base. A local fish freezing facility, which is intended to feed the fish plant in Rankin Inlet, provides a commercial outlet for local fish. At one time the local co-op ran a white whale cannery, exporting muktuk to other areas in Canada.

Arts and culture are strong in Whale Cove which boasts a number of well known carvers as well as a craft shop which displays and sells locally produced wall hangings, traditional clothing, jewellery and carvings.

In addition to these cultural resources found in the community, we also identified the resources of the people in surrounding areas as illustrated on Drawing No. 2. Each resource is documented and further described in table .

Map No.	Resource Description	Bes of
1	Old abandoned gold mine (1918-1923)	E v
2	Old cabins and a whale boat - used to be the Voisey home	E
3	H.T. A. cabin	S
4	Big whale bones	E
5	Old campsites - lots of rings	E
6	Old Hudson's Bay Post (Tavani)	E
7	Inuktivik - a story associated with this island tells of a time when local people were starving and had to eat each other - bone remnants	E

TABLE _____
 (continued)
 RESOURCES OF THE PEOPLE
 WHALE COVE

Map No.	Resource Description	Best Mode of Access	Travel Time From Community (one-way)	Best Time For Visiting Resource (Season, Month)	Other Comments
8	Corn mercial fishing operation at the mouth of the Ferguson	Boat	½ day	July/August	

iii) Existing Tourism Facilities

Table ___ provides a listing of the tourism related facilities and services found in Whale Cove.

The following provides a point form summary of the main strengths and weaknesses associated with Whale Cove's existing tourism plant:

- o The are no licensed outfitters in Whale Cove.
- o The local transient **centre** is unsuitable for tourists in terms of its size, layout and operation. However, the owner does have plans for a new hotel facility.
- o There is no suitable passenger shelter at the airstrip.
- o The local craft store provides an important tourism resource; however, because of low sales volumes new crafts are not being purchased. As a result the quality of the store's inventory has begun to suffer.

TABLE _____

TOURISM PLANT AND COMMUNITY RESOURCES

WHALE COVE

Resource	Characteristics	Other Comments
Airstrip & Terminal	<ul style="list-style-type: none"> o can handle HS 748 	
Nanuk Hotel	<ul style="list-style-type: none"> o 6 beds plus kitchen and lounge (tv and radio/cassette deck) 1 single, 1 dormitory (5 beds) o plans for 12 bed hotel beside the bay 6 rooms double occupancy with dining room/ coffee shop; taxi service; garage 	<ul style="list-style-type: none"> o \$90/day with meals (lunch & dinner prepared sometimes)
Coffee Shop	<ul style="list-style-type: none"> o no coffee prepared - not allowed to prepare food o just junk food/candy and video games - some convenience goods o hamburgers; micro-wave oven 	
Churches	<ul style="list-style-type: none"> o Anglican o Roman Catholic o Glad Tidings 	
Weather Station	<ul style="list-style-type: none"> o at community radio station 	
Craft Shop	<ul style="list-style-type: none"> o sewing goods, carvings, utensils, parkas and wall hangings o by Department of Economic Development and Tourism funded 	

X funded

2.4 Regional Tourism Resources

The following section provides a summary of the **regional** tourism resource analysis which was undertaken in order to identify the opportunities and constraints for tourism development in the hinterland areas outside the communities. This analysis was undertaken almost entirely through a review of existing data sources.

It was important to not only gain an understanding of those areas offering **potential** for tourism development, but also to identify those areas which could potentially constrain tourism development.

Drawing ² provides a summary of the regional tourism resource opportunities and constraints which are discussed in the following section under the chapter headings:

- i) Significant Tourism **Resource Areas/Resources**
- ii) Areas with **Development Restriction**
- iii) **Conflicting Land-Use Areas**

2.4.1- **Significant Tourism Resource Areas/Resources**

On the basis of our knowledge of the region's **biophysical resources** ^s obtained through discussions and investigations at the community level as well as a review of regional resource data sources, five significant tourism resource areas were identified. ¹ These are the hinterland areas exhibiting the greatest tourism potential. The five areas, illustrated on drawing ² and described in the following text, were selected on the basis of their providing a suitable diversity of activity opportunities and interest ³ combined with their degree of accessibility from the Keewatin communities.

repetitive
how about Resources/Areas?

- 0 sport fishing for grayling, char and lake trout;
- 0 sport hunting for muskox;
- 0 wildlife viewing: muskox, caribou and barren-ground grizzlies;
- 0 canoeing;
- 0 white water river rafting/kayaking; and
- 0 historical interpretation.

One of these opportunities significantly different from other locales in the Keewatin, Baffin or Arctic Coast.

At the present time the Thelon River is being considered for designation as a ^{Canadian} National Heritage River System. However, it will be ~~at least~~ several years before a decision is reached on whether to actually designate the Thelon River. The overall objectives in designating a ^{Canadian} Heritage River System are to provide for the future management of a river to ensure that:

- o the natural heritage of the river is conserved and interpreted;
- o the human heritage of the river is conserved and interpreted; and
- o the opportunities that the river possesses for recreation and heritage appreciation are realized.

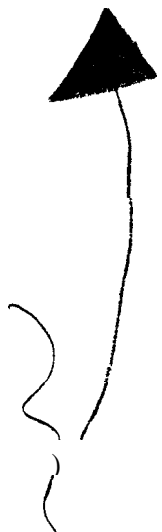
Competition with other areas & regions won't serve any area or region well.

ii) Barrenlands

The Barrenlands unit is comprised of the inland area in the southwest corner of the Keewatin Region. This unit is characterized by numerous large lakes and rivers and is representative of the true barrenlands.

The Barrenlands unit provides opportunities for the following tourism activities:

- o canoeing;
- o fishing;
- o hunting: geese and ducks;
- o historical interpretation: associated with areas liked Padlie and



iii) **Wager Bay**

X Wager Bay is a long inlet off Hudson Bay situated approximately 190 km south of Repulse Bay. The inlet extending 150 km inland is a fault basin that was created by massive upheavals in the earth's crust. The topography around Wager Bay is very scenic, varying from rock cliffs on the southwest shore to high rolling hills on the north side. The shape of the bay, with its narrow mouth and head, results in powerful tidal pressures that create **polynias** (open areas) in the winter. Another interesting phenomenon created by the tidal pressures is a set of reversing falls at the head of Wager Bay where the sea water meets the fresh water flowing from Brown Lake.

X In addition to the interesting physiographic features, Wager Bay has an interesting and still visible history. The area abounds with old archaeological sites representing both the **Thule** culture and more modern Inuit cultures. The first whites to visit the area were Europeans looking for the Northwest Passage. In the early 1900's the **Hudson** Bay Company opened a trading post at Ford Lake which still stands today, and around the same time the Roman Catholic Mission opened a post on **Nuvudlik** Island which is still standing.

However, to the **Inuit** in the Keewatin, the Wager Bay area is known as an area rich in wildlife including: caribou, polar bears, whales and falcons.

The opportunities for tourism are obvious and Parks Canada, in recognition of these opportunities, have designated Wager Bay a Natural Area of Canadian Significance and are looking at the possibility of creating a National Park.

iv) **Northern Southampton Island**

Northern Southampton Island is an extremely scenic area characterized by high cliffs rising out of the sea and high hilly terrain. Duke of York Bay with its sandy bottom and turquoise **colour** abounds with walrus and whales.

This area has been identified by Parks Canada as an area in which they have a long term interest.

v) Coats Island

The Coats Island unit consisting of Coats, **Bencas** and Walrus Islands is an area rich in wildlife and natural scenery. Excellent opportunities exist for:

- o view wing wildlife: polar bears, walrus, caribou, sea bird colonies;
- o beachcombing;
- o interpretation of natural features and scenic viewing; and
- o backpacking.

At the present time Coats Island% being considered by the Territorial government as a potential Territorial Park.

In addition to the five identified resource areas, major river routes throughout the Keewatin were identified as significant tourism resources on their own. The seven major river routes which have been identified as canoe routes are described below:

1. Dubawnt River

The headwaters of the Dubawnt are found in the **Wholdaia** Lake area just below the treeline and close to the **N.W.T.-** Saskatchewan border. Canoeists planning to **paddle** the 1760 km Dubawnt would normally charter into **Wholdaia** Lake from either Fort Smith, **N.W.T.** or Uranium City, Saskatchewan. The Dubawnt flows into the **Thelon** River just west of Baker Lake.

2. Ferguson River

The **Ferguson** River extends 320 km from its headwater in the Ferguson Lake area to Hudson Bay. Canoeists can access the headwater by chartering from either Rankin Inlet or Eskimo Point. The route is described as providing everything for the canoeist from flatwater paddling to whitewater canyons.

3. Kazan River

The Kazan River runs north from Snowbird Lake 960 km to Baker Lake. This river is described as a spectacular and challenging canoe route running through an area rich in wildlife, fish and archaeological sites. Canoeists can access the headwaters by chartering from Eskimo Point, Fort Smith, **N.W.T.** or Lynn Lake, Manitoba.

4. Back River

X The Back River runs through the northwest **corner** of the Keewatin Region on its way from **Aylmer** Lake to **Chant^eey** Inlet on the Arctic Ocean. Canoeists planning to paddle this remote and cliff **icult** 960 km canoe route would charter to **Aylmer** or Sussex Lakes from **Yellowknif e**.

5. Tha-Anne River

Flowing from the Henik Lake area the Tha-Anne River flows 224 km across the tundra to Hudson Bay near Eskimo Point. Canoeists planning to paddle this river would have to charter in and out to Eskimo Point.

6. Thlewiaza River

Paralleling the Tha-Anne River, the Thlewiaza flows 264 km east from the Nueltin Lake area to Hudson Bay where it joins up with the Tha-Anne River.

7. Thelon/Hanbury River

One of the most popular canoe routes in the Keewatin, the **Thelon/Hanbury** system extends 800 km from either Lym Lake on the Thelon or Campbell Lake on the Hanbury east to Baker Lake. This river route flows through the Thelon Game Sanctuary which is rich in history and wildlife. Some canoeists continue on down Baker Lake and out Chesterfield Inlet to Hudson Bay. Canoeists access the river by charter from Yellowknife.

2.4.2- Areas with Development **Restrictions**

A number of areas within the Keewatin Region have been recognized as containing natural resources of sufficient significance to warrant some degree of protection. In spite of this recognition, many of these areas have no official protective status, however, it is important to view them as potentially restricted development areas.

Areas with development restrictions, as shown on drawing ² , include six IBP ecological sites, one wildlife sanctuary and three bird sanctuaries.

i) **I.B.P. Ecological Sites**

I.B.P. stands for the International Biological Programme which is a co-operative program between the International Council of Scientific Unions and 58 participating nations to study the biological productivity of the earth's ecosystems and relate this to human adaptability and welfare. The six **I.B.P.** sites identified in the Keewatin Region are areas of biological and geological importance which have been identified as urgently requiring special protection.

X In 1975, **D.I.A.N.D.** gave **approval-in-principle** to the concept of ecological sites in the north. It was agreed that native hunting and fishing would be allowed, and in some cases multiple uses including resource development would be permitted.

A committee with representation from Indian and Northern Affairs Canada, Environment Canada and the Territorial governments, was set up to consider proposals to designate **I.B.P.** sites throughout the north. A working assumption with this group estimates that perhaps a third of the **I.B.P.** sites in the north **will** actually be designated for protection.

ii) **Sanctuaries**

Within the Keewatin Region there are three bird sanctuaries which are protected under the Federal Migratory Birds Convention Act. These sanctuaries are administered by the Canadian Wildlife Service. While the

policies regarding bird sanctuaries do not preclude recreational activities, they do restrict all activity which might disturb the birds when they are in occupancy as well **as** activities which might disturb the habitat when the birds are absent. The most sensitive period for the sanctuaries is from early June to mid-September.

In effect, policies regarding the bird sanctuaries do not prohibit recreation activities but they are intended to inhibit recreation activities.

The following provide brief descriptions of the bird sanctuaries found in the Keewatin Region.

a) Queen Maud Gulf Migratory Bird Sanctuary

The Queen Maud Gulf was created as a bird sanctuary in 1961 primarily to protect the rare Ross' goose. The sanctuary has also been described as having the largest variety of geese in any nesting area in North America.

X This sanctuary, although extending partially **into** the Keewatin Region, is more easily accessed from the Kitikme[?]t communities.

b) East Bay and Harvey Gibbons-Migratory Bird Sanctuaries

These two bird sanctuaries, found on Southampton Island, were established in 1959 to protect the nesting areas of two separate populations of lesser snow geese. In addition to the snow geese both sanctuaries provide nesting areas for other species including Atlantic Brant, small Canada geese and king eider ducks. **In** addition, East Bay is used by a **beluga** whale population during the summer.

c) McConnell River Migratory Bird Sanctuary

The McConnell River sanctuary- located just south of Eskimo Point was established in 1960 to protect lesser snow geese nesting colonies. In addition to the snow geese there are over 100 different species of birds and waterfowl that can be seen in the sanctuary.

In addition to the bird sanctuaries there is one game sanctuary in the Keewatin as shown on Drawing 2. The **Thelon** Game Sanctuary was created to protect the muskox herds. The sanctuary is protected under the Territorial Wildlife Ordinance which completely disallows hunting. In addition, all development activity is prohibited within the **Thelon** Game Sanctuary. Although recreation is not prohibited in the sanctuary it is discouraged if it is felt to be potentially destructive of wildlife habitat.

Some of the more interesting features in the sanctuary include abundant wildlife such as caribou, musk-oxen, wolves and barrenland **grizzlies**, the treeline **anomaly** extending up the **Thelon** River and numerous historic and archaeological sites.

2.4.3- **Conflicting Land-Use Areas**

The two major conflicting land-uses in the Keewatin Region include mining activities and oil and gas exploration activities.

i) **Mining Activity**

The only active mine in the Keewatin Region is the **Cullaton** Lake Gold Mine located 370 km southwest of Rankin Inlet. Gold and silver are being mined at the rate of 203 tonnes per day. Future plans include expansion of the mill to 454 tonnes per day as well as exploration of adjacent gold **anomalies** surrounding the mine.

Other exploration activity is continually ongoing in the Keewatin, centred mainly in the area west of Baker Lake. In particular, uranium, gold and base metals are found in the Keewatin.

ii) **Oil and Gas Exploration Activity**

Geological evidence indicates that two large sedimentary basins exist in Hudson Bay. The larger of the **two**, the Hudson Bay Basin, is thought to comprise an offshore area extending from the **Belcher** Islands up to Coats Island. To date only preliminary magnetometer and seismic surveys have

been undertaken. Although there is potential for extracting oil and gas from this basin, it is unlikely that development will occur in the near future because of access problems.

The other significant oil and gas related activity in the Keewatin is the proposed Polar Gas pipeline. In 1977, the Polar Gas Group filed an application with the National Energy Board and the Department of Indian Affairs and Northern Development for approvals to construct a 3765 km pipeline from the Drake Point and Hecla natural gas fields on Melville Island to join up with the Trans-Canada pipeline at Longlac, Ontario. This route would have taken the pipeline through the west side of the Keewatin Region. However, in 1978 as a result of technological advances in deep marine pipe-laying, Polar Gas identified a new potential pipeline routing to the west of the Keewatin Region.

2.5 Tourism Resource/Activity Analysis

X
1 The following section provides a summary of the resource, specific activity opportunities in each of the Keewatin communities and h~~y~~nterland tourism resource areas.

It should be kept in mind that the objective of the Keewatin Region Tourism Study is to examine the potential of community based tourism directed toward the concentration of economic benefits from tourism within specific communities where the development of appropriate tourism opportunities and infrastructure is to be encouraged.

The intention of the project is, therefore, to emphasize development of tourism opportunities within or close to settlements while seeing that visits to tourism attractions elsewhere in the region are of some economic benefit to local communities which ideally will serve as basis for hinterland attractions.

We have, therefore, considered all but one of the significant hinterland tourism resource areas identified in Section 2.4 as being associated with the nearest community. The communities that each of the areas and resources were associated with are as follows:

Thelon River - Baker Lake

Wager Bay - Repulse Bay

Northern Southampton Island - Repulse Bay (for activities accessible by boat)

X

-Coral Harbour (for activities accessible by plane)

Coats Island - Coral Harbour

X Dub^awnt River - Baker Lake

Ferguson River - Whale Cove

Kazan River - Baker Lake

Tha-Anne River - Eskimo Point

Thlewiaza River - Eskimo Point

East Bay and Harry Gibbons Migratory Bird Sanctuaries - Coral Harbour

McConnell River Migratory Bird Sanctuary - Eskimo Point

X
X

The unit identified as the Barrenlands will be considered on its own in the following evaluation. The Back River and Queen Mary^y Bird Sanctuary were considered to be more accessible from the Kitik^mmeot Region and although a portion does extend into the Keewatin, they cannot really be considered as Keewatin tourism resources.

The following tables provide a summary of the activity evaluations for each community as well as the Barrenlands. For each specific activity, we have identified the best season in which to undertake the activity along with the corresponding best method of accessing the resource required for the activity. We have also identified the major opportunities and constraints associated with each activity. Then each activity was evaluated as to the degree of resource suitability within each community/area, on a comparative basis with the Keewatin Region as a whole.

→ what about when stacked up against adjacent Regions???

COMMUNITY BAKER LAKE

VTT

ACTIVITY	BEST SEASON OF USE				BEST MODE OF ACCESS				DEGREE OF SUITABILITY	Major Constraints/Opportunities	
	WINTER	SPRING	SUMMER	FALL	FOOT	HONDA	BOAT	SNOWMOBILE			PLANE/HELICOPTER
SCENIC VIEWING			●			●				medium	Long distance from community.
INTERPRETATION OF NATURAL FEATURES			●				●			Medium	Opportunities like Kasan Falls, Thelon Rapids, Narrows.
VIEWING/INTERPRETING HISTORIC/ARCHAEOLOGICAL SITES			●							Medium	related to rivers.
BIRD WATCHING			●							Medium	Variety of accessible sites.
ROCK HOUNDING										Low	rare/precious waterfowl; but some distance from community.
BACKPACKING										Medium	Reported to be semi-precious stones in the area.
CANOE TRIPPING			●							Medium	Opportunities associated with Kasan and Thelon rivers.
WHITE WATER KAYAKING/RAFTING			●							High	Thelon, Kasan, Lubawnt Rivers.
DOG SLEDDING			●					●		High	Requires further investigation to determine quality. <i>How could it be assessed?</i>
ICE FISHING										Medium	
OPEN WATER FISHING			●					●		High	Numerous potential areas.
LEARN-OBSERVE-EXPERIENCE			●						●	High	Best resources accessible by plane.
CROSS-COUNTRY SKIING			●							Low	trails and crabs provide major opportunity.
BOAT TOURS										High	Uninteresting terrain.
AMATEUR BOTANY										High	Associated with trip to Chesterfield Inlet and local areas.
BEACHCOMBING			●							Medium	river deltas provide opportunity.
BIG GAME HUNTING			●					●		Medium	For musk-ox and possibly caribou.
WATERPOWL HUNTING			●					●		Medium	For ducks and geese.

ACTIVITY EVALUATION MATRIX

ACTIVITY	BEST SEASON OF USE				BEST MODE OF ACCESS					DEGREE OF SUITABILITY	Major uses Opportunism
	WINTER	SPRING	SUMMER	FALL	FOOT	HONDA	BOAT	SNOWMOBILE	PLANE/HELICOPTER		
WILDLIFE VIEWING			●	●			●			Low	
SCENIC VIEWING		●			●		●			Low	
INTERPRETATION OF NATURAL FEATURES			●			●				Low	
VIEWING/INTERPRETING HISTORIC/ARCHAEOLOGICAL SITES			●			●				Medium	Sentry Island/Upper Eskimo Point.
BIRD WATCHING			0	1		●				High	McConnel Bird Sanctuary
ROCK HOUNDING										Low	
BACKPACKING			●		●					Low	Lack of visual diversity.
CANOE TRIPPING			●			●				Medium	
WHITE WATER KAYAKING/RAFTING			0			●				Low	
DOG SLEDDING				●						Medium	
ICE FISHING		●								High	Distance community
OPEN WATER FISHING			●			●				Low	Mageuse
LEARN-OBSERVE-EXPERIENCE	●		●	●						High	
CROSS-COUNTRY SKIING			●							Low	
BOAT TOURS			●			●				Medium	Open water constraints/tidal flats.
AMATEUR BOTANY			●			●				High	Requires interpretive material.
BEACHCOMBING			●			●				Low	
BIG GAME HUNTING				●		●				Low	
WATERFOWL HUNTING				●		●				High	Needs organization.

ACTIVITY	BEST SEASON OF USE				BEST MODE OF ACCESS				DEGREE OF SUITABILITY	Major constrain Opportunity
	WINTER	SPRING	SUMMER	FALL	FOOT	TRUCK	BOAT	PLANE/HELICOPTER		
WILDLIFE VIEWING							●	●	Low	Wildlife not highly visible.
SCENIC VIEWING							●	●	Low	Little topographic relief.
INTERPRETATION OF NATURAL FEATURES			●		●				Low	Typical coastal physiography.
VIEWING/INTERPRETING HISTORIC/ARCHAEOLOGICAL SITES			●		●				High	Depot Island, Cape Fullerton, numerous archaeological sites, historic buildings in community.
WATERFOWL HUNTING			●						Low	
BOAT HUNTING			●						Low	
BACKPACKING			●						Low	Uninteresting topography.
RAFTING			●						Low	Some canoeists paddle from Baker Lake.
WHITE WATER RAFTING									N/A	No opportunity.
DOG SLEDDING									Low	
ICE FISHING			●						High	Numerous opportunities along the coast.
OPEN WATER FISHING									Medium	No large inland lakes.
LEARN-OBSERVE-EXPERIENCE			●						Medium	
CROSS-COUNTRY SKIING			●						Low	
BOAT TOURS			●						High	Possibility for trips to Baker Lake.
AMATEUR BOTANY			●						Medium	
BEACHCOMBING			●						Low	
BIG GAME HUNTING			●						Medium	Interest for caribou sport hunting.
WATERFOWL HUNTING			●						Medium	

COMMUNITY CORAL HARBOUR

ACTIVITY EVALUATION MATRIX

ACTIVITY	BEST SEASON OF USE				BEST MODE OF ACCESS				DEGREE OF SUITABILITY	Major Constraints/Opportunities
	WINTER	SPRING	SUMMER	FALL	HONDA	BOAT	SNOWMOBILE	PLANE/HELICOPTER		
WILDLIFE VIEWING			●			●			High	elrus, polar bears, birds in the Coats Island area.
SCENIC VIEWING			●			●			High	Coats Island.
INTERPRETATION OF NATURAL FEATURES			●			●			Medium	
VIEWING/INTERPRETING HISTORIC/ARCHAEOLOGICAL SITES			●			●			Low	Few accessible sites.
BIRD WATCHING			●			●			High	Two bird sanctuaries.
ROCK HOUNDING									Low	
BACKPACKING			●			●			High	Coats Island and Northern Southampton.
CANOE TRIPPING			●						Low	
WHITE WATER KAYAKING/RAFTING			10						Low	
DOG SLEDDING									Low	
ICE FISHING									Medium	
OPEN WATER FISHING			●			●			Low	
LEARN-OBSERVE-EXPERIENCE			●						Medium	
CROSS-COUNTRY SKIING			●						Low	Uninteresting terrain.
BOAT TOURS			●						Medium	Dangerous boating.
AMATEUR BOTANY									Medium	
BEACHCOMBING									High	Coats Island beaches.
BIG GAME HUNTING			●						High	The endous opportunity polar bear hunts.
WATERFOWL HUNTING									Low	Birds leave when season opens.

ACTIVITY EVALUATION MATRIX

ACTIVITY	BEST SEASON OF USE				BEST MODE OF ACCESS					DEGREE OF SUITABILITY	Major Constraint Opportunities
	WINTER	SPRING	SUMMER	FALL	FOOT	HONDA	BOAT	SNOWMOBILE	PLANE/HELICOPTER		
WILDLIFE VIEWING					●	●	●	●		Low	Distance from community.
SCENIC VIEWING		●	●		●	●	●	●		Medium	Lack of trails/information/outfitters.
INTERPRETATION OF NATURAL FEATURES										Medium	Lack of trails/information/outfitters.
VIEWING/INTERPRETING HISTORIC/ARCHAEOLOGICAL SITES			●		●	●				High	Lack of trails/information/outfitters.
BIRD WATCHING			●	●	●	●	●	●		Low	Distance from community.
ROCK HOUNDING			●							High	No access to shoreline.
BACKPACKING										Medium	Needs outfitter/designated trails.
CANOE TRIPPING			●					●		Low	
WHITE WATER KAYAKING/RAFTING			●					●		Low	
DOG SLEDDING		●			●		●	●		Low	Needs outfitter.
ICE FISHING		●	●		●		●	●		High	Needs outfitter.
OPEN WATER FISHING			●							High	"
LEARN-OBSERVE-EXPERIENCE	●	●	●	●	●	●	●	●		Medium	Community tours/information lacking.
CROSS-COUNTRY SKIING			●		●			●		High	
BOAT TOURS			●							Medium	Needs outfitting/destination points.
AMATEUR BOTANY			●					●		High	
BEACHCOMBING			●							Low	
BIG GAME HUNTING				●				●		Low	
WATERFOWL HUNTING				●				●		High	

ACTIVITY	BEST SEASON OF USE				BEST MODE OF ACCESS					DEGREE OF SUITABILITY	Major Constraints/Opportunities
	WINTER	SPRING	SUMMER	FALL	FOOT	KAYAK	BOAT	SNOWMOBILE	PLANE/HELICOPTER		
WILDLIFE VIEWING			●				●			Low	Wildlife not highly visible.
SCENIC VIEWING			●				●			Low	Typical coastal terrain.
INTERPRETATION OF NATURAL FEATURES			●				●			Low	
VIEWING/INTERPRETING HISTORIC/ARCHAEOLOGICAL SITES			●				●			Low	
BIRD WATCHING			●				●			Low	
ROCK HOUNDING			●		●		●			Low	
BACKPACKING			●				●			Low	Uninteresting terrain.
CANOE TRIPPING			●						●	Medium	Ferguson River.
WHITE WATER KAYAKING/RAFTING			●				●			Low	
DOG SLEDDING		●								Low	
ICE FISHING		●					●			High	Ferguson and Wilson Rivers.
OPEN WATER FISHING			●				●			Low	No accessible Big inland lakes.
EARN-OBSERVE-EXPERIENCE		●	●							Medium	
CROSS-COUNTRY SKIING		●								Low	
BOAT TOURS			●							Medium	
AMATEUR BOTANY			●							Medium	
BEACHCOMBING			●				●			Low	
BIG GAME HUNTING										Low	
WATERFOWL HUNTING				●						Medium	

3.0 COMMUNITY INVOLVEMENT PROGRAM

3.1 Introduction

A major intent of the study was to develop and implement an educational process whereby the project would help to create a greater awareness of tourism and its implications in each of the Keewatin communities. In addition, the ultimate intent of the study was to develop a tourism plan that reflects the individual community's views and concerns, as well as the realities of the potential tourism resource base. It was intended that the plan be within the capabilities of the communities to implement. Thus the community involvement process played a major role in the overall project approach.

The following steps were taken in each of the communities in order to ensure that all residents were aware of the study and its objectives, and to encourage as much public discussion as possible.

- o A tourism planner visited each of the communities in all four seasons.
- o During each visit the planners were encouraged to participate in community events and to interact with the community on a social basis.
- o Prior to the planners arrival in the communities, each time, an article was written in the K.I. A. newsletter to announce their impending arrival and purpose for the visit.

In addition local contact persons were asked to go on the radio to announce the upcoming visit by the tourism planners.

- o A second audio visual slide show was prepared for the winter visit. This slide show outlined the roles envisioned for each community in the Keewatin Region tourism industry and provided an overview of the types of potential development opportunities in each community. The show was presented at community meetings as well as smaller group meetings and was intended to provide community residents with the opportunity to participate in the planning process and respond.

The following sections provide a summary of the general feelings and **concerns** expressed by community residents in each of the communities.

3.2 Baker Lake

The following comments and concerns are representative of the questions, concerns and ideas expressed by the Baker Lake residents.

Typical Questions:

- o What types of things would tourists **like** to do when they visit Baker Lake?
- o When will the tourists start coming?
- o Would the community be involved in bringing the tourists?
- o What types of arts and crafts would tourists be interested in?
- o What success have some of the other communities had with tourism?
- o Why do some tourists complain when they come to the community?

Typical Concerns:

- o The high cost of airfares into and around the Keewatin will hurt tourism.
- o At this stage of **development** there may be problems with local businesses not being reliable enough.
- o There were problems this past **summer** with some of the tourist groups that came to Baker. Activities were not organized properly.
- o There is a problem of what to do with canoeists when they come to Baker Lake. (i.e. when they are looking for a shower or a meal).
- o Tourists who do not hire local outfitters and go out fishing are not helping the community.
- o Aircraft should not be allowed to fly low around local wildlife.
- o Tourists should not be allowed to ruin old camps or disturb old markers.
- o Have to make sure that tourists are not taking advantage of the **Inuit**.
- o The traditional **camp** has worked out quite well; it is beneficial to the community in a number of ways.

Ideas:

- o Should have an orientation show for tourists when they arrive, perhaps in an orientation centre.
- o Would it be possible to develop a naturalist lodge near Baker Lake?

RTO should be
doing this job
in community!

- o Should look at the possibility of hiring a full time **Tourism** Officer next year to organize and co-ordinate tourism in the community.
- o May look at the possibility of producing Traditional Camp brochures next year.

3.3 Chesterfield Inlet

The following comments and concerns are representative of the questions, concerns and ideas expressed by the Chesterfield Inlet residents.

Typical Questions:

- o Is there any rule as to how far tourists could go away from the community?
- o Will this study produce a booklet like the historic studies in Baker Lake and Eskimo Point?
- o What have the results of the study shown so far?

Typical Concerns:

- o There is not enough potential in Chesterfield Inlet **for** more than one outfitter.
- o There is a lack **of** local crafts being made in the community.
- o The **Co-op** does not pay local craftsmen enough.
- o It might be difficult for tourists to-stay at the hotel in late summer when it is full of contractors.
- o There is not very much for tourists to see and do around Chesterfield; it is just a good hunting area.
- o **Some** of the areas around Chesterfield may not be very good for tourists because of polar bears; in June and July there are a lot of bears along the coast.

Ideas:

- o Considering the possibility of running dog team trips next year.
- o Should have a liaison person in the community to co-ordinate local craft production.

R.T.O. should be involved!

- 0 There is a lot of historical interest in and around Chesterfield i.e.
 - the Hudson's Bay Company
 - the Roman Catholic Mission
 - Cape Fullerton
 - Depot Island
- o The old original church might be the ideal building to house a museum.
- o A historical study should be done for the area between Chesterfield and Cape Fullerton.

3.4 **Coral Harbour**

The following comments and concerns are representative of the questions, concerns and ideas expressed by the Coral **Harbour** residents.

Typical Questions:

- o Will we have to wait until next year, until the recommendations are made before we start tourism?
- 0 **When will** the tourists start to visit Coral **Harbour**?
- 0 Will there have to be a tourism committee?
- 0 If tourists came would they have to stay in camps?
- 0 Would tourists be interested in buying local crafts from the sewing ladies and the **Co-op**?
- 0 How long will the tourists stay when they come?
- 0 Where will the tourists come from ?
- 0 Would the tourists come year after year for a long time?
- 0 What would happen if the tourists did not like the area around Coral **Harbour**?
- 0 What is the bad side to tourism?

Typical Concerns:

- o Recently the Hamlet held a vote and the majority of residents voted yes, in **favour** of tourism.
- o Tourists should **be** warned about bad weather in September **and** October.
- o The ladies in the community are trying to develop a sewing group, however, there is no building for them.

Ideas:

- o There may be good potential for fly-in fishing from Coral Harbour using helicopters.
- o We are looking into the possibilities for walrus and caribou sportshunting down at Coats Island.

3.5 Eskimo Point

3.6 Repulse Bay

The following comments and concerns are representative of the questions, concerns and ideas expressed by the Repulse Bay residents.

Typical Questions:

- o Would the tourists only start to come after we produce a brochure?
- o You have now been to some of the other communities; which one has the best resources?
- o Will you be looking at the sportshunting market?

Typical Concerns:

- o There were two polar bear sportshunters in Repulse in 1984 and neither of them got a bear.
- o There are not very many tourists in Repulse Bay yet, we would like to attract more.

3.7 Whale Cove

The following comments and concerns are representative of the questions, concerns and ideas expressed by the Whale Cove Residents.

Typical Questions:

- o Are the other communities interested in having tourists come?
- o Would the tourists be willing to help out with our carving businesses?

- o Would a person make money or lose money by taking tourists out as an outfitter?
- o Who would decide on the price to be paid, the tourist or the outfitter?
- o Would tourists be interested to stay in local homes?
- o Would the tourists need fishing licenses?
- o When taking tourists out would the outfitter provide the food and clothing?

Typical Concerns:

- o People seem to be getting interested in tourism now because of what they have seen in Eskimo Point.
- o The old culture is dying; it would be interesting for tourists to learn about the Inuit culture before it is gone.
- o If the other Keewatin communities are accepting tourism then the small communities would feel left out if they did not accept tourism.
- o Tourists should be warned to bring warm clothing; the Keewatin can be very cold.
- o The community has to be prepared for tourists; if the tourists are old people they should not go out on the land with a young person who drives carelessly.
- o It would be better if only a few tourists came at the same time; as some tourists may be very difficult to deal with.
- o The HTA would like to make sure they have a chance to review the ideas for Whale Cove before they become final recommendations.
- o Tourists would be very welcome to ask questions and learn about the Inuit culture.

Ideas:

- o The HTA would like to be involved in appointing outfitters for Whale Cove.
- o Tourists may take pictures and show them down south to help interest others in visiting the north.
- o Tourists should hire an interpreter and go and ask questions of the elders.

3.8 Rankin Inlet

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Cats often not included when detailing specific tours & tour packages.

4. MARKET ANALYSIS

4.1 Introduction

In this chapter, the existing and potential travel markets to the Keewatin will be identified and analysed. More specifically, the chapter will provide:

- o an introduction to the market analysis rationale;
- o an outline of the methodology used to complete the analysis;
- o a description of the Keewatin's current tourism market;
- o an analysis of current and projected societal, leisure and travel trends and their implications for the Keewatin;
- o the identification and analysis of eight specialty markets; and
- o a summary analysis linking the above market information to the tourism resources of the Keewatin (dealt with in the previous chapter), in the form of a market/resource association matrix.

Several markets are suggested for specific tours but no idea of members given. Alternatives are made, but it isn't tied together neatly.

Trends are given internationally but little is said about trends as they affect tourism in Keewatin, especially.

4.1.1 - Rationale Supporting Our Market Analysis

In today's highly competitive tourism industry, where consumers are generally sophisticated and value conscious, it becomes critical to identify those specific market groups that could be successfully attracted to and supported by a region's tourism resources.

The first objective, therefore, in our market analysis is to evaluate existing and potential market conditions and trends as they relate to the Keewatin's current and potential tourism resource base. A further objective is to isolate from this information specific market groups that could be the target of focused promotional efforts by the regional tourism industry. A more detailed analysis of the characteristics and potential of these specific markets leads to a final selection of target markets considered most appropriate for the promotion of tourism in the Keewatin.

The final product of the market analysis is the identification of tourism activities/events which could be successfully promoted, based on market demand and which could give the Keewatin a competitive edge in Arctic tourism.

4.1.2 - Methodology

Our first task was to review readily available market data to determine the origin and characteristics of tourists who currently visit the Keewatin. We needed to obtain a better understanding of the markets that are providing tourists to the Region, their relevance to the existing or developable resource base, their size and the existing market penetration obtained by the Region.

We accomplished this first task by consulting:

- o various government and private publications;
- o the Northwest Territories Tourist Exit Survey;
- o the Keewatin Tourism Exit Survey (administered by Marshall Macklin Monaghan); and
- o available accommodation occupancy records.

On the basis of this data we also reviewed a number of trends developing today in the areas of demographics, values and lifestyles, the economy and energy which are going to significantly affect the tourism industry of the future. The likely future impact of these tourism trends on the Region's tourism industry was then evaluated.

In order to increase the data base for the assessment of the existing market and also to investigate the selected potential specialty markets for the Region, we conducted a series of telephone interviews with:

- o tourist operators and outfitters;
- o tour wholesalers; and
- o special interest groups.

IDENTIFY
CONTACTS
& NATURE
OF
DISCUSSION

We requested information on their existing operation or services; their current market; their future development plans; if they operate within or offer tours to the Keewatin, the perceived problems and/or assets of the Region; and, if they don't operate within the Keewatin, their level of interest and conditions attached to establishing themselves in the Region.

Operators and wholesalers which operate out of or to the Keewatin were contacted as well as those in intervening/competing areas at both the national and international scale. Special interest groups relating to the specialty markets selected were contacted with a view to assess their market characteristics and their potential attraction to the Keewatin.

A more complete description of this methodology is located in Section 4.4 Identification of Specialty Markets.

4.2 Tourism Travel to the Keewatin

4.2.1 - Historical Perspective

It appears that tourism to the Keewatin District and the Northwest Territories has steadily increased over the few decades. An estimated 500 tourism-related visitors in 1959 had increased more than 25 times to an estimated 12 500 visitors in 1969. By 1981, this number has tripled to an estimated 35 000 visitors. This upward trend appears to have continued according to a recent government survey which indicates that an estimated 44 000 persons visited the Northwest Territories in 1982.⁽¹⁾

While extensive records are not available, it appears that the number of visitors to the Keewatin District is a relatively small percentage of the total number of visitors to the Northwest Territories. For example, the destination of 600 visitors of an estimated 44 000 visitors to all the Territories in 1982 was the Keewatin.⁽²⁾ This represents 1.3 percent of the total number of visitors to the Northwest Territories in 1982.

dry ones in particular!?
no longer used as an administrative unit.

(1) **Source:** Government of the Northwest Territories, Department of Economic Development and Tourism, Division of Tourism and Parks. November 1982. Visitors to the Northwest Territories.

(2) *Ibid.*

How is this figure reflected in amounts of funding allocated to zones. It would appear good it is strictly playing politics as there possibly should be some weighting towards areas that have greater potential to generate \$.

Over the past fifteen to twenty years visitation to the Keewatin has undergone a fairly substantial change. Visitors to the Keewatin twenty years ago were usually the result of occasional air charters of individuals or small groups of people (i.e., 3-6 persons) who flew in to the Keewatin for a few days of fishing. The visits by fishermen increased as small fly-in fishing lodges were established. Today, an average of 50 to 100 persons visit each of over ten fly-in fishing lodges located in the Keewatin annually.

PREVIOUS PAGE SAID ONLY 600 VISITORS AND HERE THEY SAY THEY ARE 700-1000 JUST FISHERMEN. DOES 600 COVER SOME OF THESE?

In the past few years, there has been an introduction of visitors who are interested in seeing the land and learning about the people of the Keewatin rather than just fishing. These visitors come in small groups of 10-20 persons and visit the Keewatin for only one or two days as part of a general package travel tour. If the past trends are an indication, this type of visitation appears to have the potential to make a strong contribution to the total number of visitors to the Keewatin annually.

HOW MANY SOUTHERN TOUR COMPANIES ARE VISITING THESE 10-20 ONLY FROM HORIZON HOLIDAYS.

4.2.2 - Existing Visitation

In order to assess current visitation to the Keewatin, we consulted a number of sources including:

- o various existing publications;
- o hotel occupancy records;
- o air carrier statistics; and
- o tour wholesalers currently offering tours to the region.

The publications consulted were primarily government reports issued from the Northwest Territories or Tourism Canada. Reference will be made to them where appropriate.

any recommendations? 7/1/60

Unfortunately hotel occupancy records are virtually non-existent for accommodations located in the Keewatin. However, it was possible to obtain figures from the guest book at the Tugalik Inn in Eskimo Point and to calculate the percentages representing each visitor group, for example, tourists, government officials, airline employees, etc.

WHAT ABOUT RANKIN INLET LODGE

Air carrier statistics from Northwest Territorial Air and Calm Air, both operating within the Keewatin, were used to help establish the total volume of air traffic to and from the Keewatin.

Tour wholesalers currently offering tours to the Keewatin were contacted. Information resulting from phone surveys was used to assess the numbers of tourists taking advantage of the tours, trends developing, the characteristics of these tourists and activities pursued while in the region.

In addition to the above, we designed a tourist exist survey⁽¹⁾ for the Keewatin area specifically, which would complement the Northwest Territories tourist exit surveys and supply data on tourism in the Keewatin. Both NWT Air and Calm Air administered the surveys during the spring and summer of 1984. A total of 93 surveys were collected throughout this period.

*WAS THIS
RANDOM SAMPLING*

Please note that the following analysis of current visitation to the Keewatin is focused on key statements we have extracted from all of the available information including the results of our own Keewatin Tourist Exit Survey. Under each statement heading which we feel highlights a specific condition or characteristic of visitation to the Keewatin, we will provide a brief description and analysis and we will indicate the source of the information.

The Keewatin Receives a Small Share of the NWT Tourist Market

The number of visitors to the NWT has increased from 500 in 1959 to 44 000 in 1983. Total annual expenditures by visitors and residents travelling in the NWT in 1981-1982 have been estimated to be \$58 million. Just one season later, visitor expenditures have increased to \$65 million⁽²⁾.

The share of these visitors to the Keewatin, however, is low, as are the economic benefits in the form of visitor expenditures. On a regional basis, the majority of summer visitors to the NWT overall travel to the Fort Smith region. Trips to the Inuvik region are made by about one-third of summer travellers. The Central Arctic and the Baffin and Keewatin regions receive far less visitors⁽²⁾ than the above regions.

-
- (1) See Appendix A for a copy of the Keewatin Tourist Exist Survey.
 (2) GNWT, 1984. Visitors to the Northwest Territories and Activity of Northwest Territories Tourism Business, 1983.
 (2) Ibid.

In terms of the economic impact of tourism in the Keewatin, some information can be drawn from a report entitled "An Evaluation of the Impact of Summer Tourism on NWT Businesses, 1983" which was presented to the Government of the NWT by Canadian Facts of Vancouver. Some more salient points that can help to place the Keewatin in context are outlined below:

- o The vast majority of tourism-related businesses are located in the Fort Smith region (70%). The Keewatin contains (13%) of tourism-related businesses in the Northwest Territories. *WHAT IS THE BREAKDOWN OF THIS FIGURE (2) WHAT PERCENTAGE IS FISHING LODGES.*
- o Although there appears to be no significant differences between regional businesses operating in the five different NWT regions, indications are that the Keewatin has the longest running tourism-related businesses: 20 years as compared to an average of 12 years for other regions. *?*
- o The effect of seasonal tourism on the businesses located throughout the NWT regions appears to vary. Business volumes in the Fort Smith, Inuvik and Central Arctic regions may double in the summer period. However, the Keewatin experiences a large increase while Baffin businesses report a more consistent flow of revenues throughout the year. These findings should be interpreted with extreme care and used only as general indicators since the findings are subject to a high degree of statistical error due to the fact that most businesses are located in the Fort Smith region. *WHERE DID YOU GET THIS FROM.*

A specific tourism economic impact analysis for the Keewatin could clearly provide more detailed and statistically significant information. This might be useful at the outset of intensive tourism promotion and marketing since the data could be used as a benchmark to evaluate the performance of these tourism development strategies.

Tour Wholesalers were Contacted in Order to Identify the Number of Tourists Visiting the Keewatin on Commercial Tours

According to those tour wholesalers contacted, only a handful of tourists are taken on tours in the Keewatin with the exception of the Via Tour which takes approximately 26 tours of 18 people ^{each} to Eskimo Point as part of their "Hudson's Bay Explorer" and "Great White Bear Explorer" tours. However, the tours only fly visitors to Eskimo Point for the day.

WHAT APPROACH IS REQUIRED TO MAXIMIZE THIS CO. EFFORTS

North American Nature Expeditions based in Alabama took two groups of 12 to Rankin Inlet as part of their "Arctic Encounters" tour which was offered for the first time in 1984.

WHAT IS THE FUTURE ALSO A PRODUCT MATRIX MIGHT BE USEFUL TO IDENTIFY WHAT IS SELLING -

Horizon Tours of Toronto is the wholesaler which currently offers the most comprehensive tour of the Keewatin. On an eight day trip, visits are made to Churchill, Eskimo Point, Rankin Inlet, Baker Lake and Repulse Bay. In 1984, about 60 tourists total took advantage of the two tours to Hudson's Bay and the Keewatin. As with the tour offered by North American Nature Expeditions, however, length of stay within the communities is extremely short. In all, only two nights are spent in Rankin Inlet on the Horizon tour.

Cost?

DID CONSULTANT ASK WHY STAY IS SO SHORT. AND IF ANY DEVELOPMENTS WOULD HELP INCREASE THIS FIGURE - PRODUCT MARKET MATCH!

The Great Canadian Travel Company Ltd. offers the only self-guided tour to the eastern Arctic on a 21 or 14 day "Arctic Pass" tour. Clients are given information on several Arctic communities and then given the opportunity to literally draw up their own itinerary. In total, about 45 tourists visit Rankin Inlet for an average of 2 to 3 days while on their Arctic Pass tour.

Cost?

CAN THIS FIGURE BE CONFIRMED. WE'VE HAD TROUBLE WITH THIS CO. IN THE PAST!

Other wholesalers such as Norcan of Timmins and Thunder Bay and Special Interestours of Medina, Washington take relatively small numbers of fishing parties to areas west of Baker Lake and Rankin Inlet respectively.

← HOW MANY & WHY?

In total, approximately 600 tourists visited the Keewatin on organized packaged tours during the 1984 summer season. This total is clearly representative of a relatively undeveloped tourist industry. In addition, limited economic benefit is currently derived from tourism in the Keewatin since few meals and hotel accommodations are required for these existing short-term tours.

THIS WEAKNESS SHOULD BE ACCOUNTED FOR IN THE MAJOR STRATEGY - WAYS TO OVERCOME THIS.

Visitors to the Keewatin Originate from both Canada and the United States

Depending on their reasons for travelling in the Keewatin and their mode of travel, visitor origins appear to be split between Canada and the United States. For example, most tourists on packaged tours travel aboard charter aircraft: these visitors originate primarily in the United States. One exception to this general rule is Horizon Tours which currently targets the retired Canadian market.

WHAT IS BREAKDOWN OF MARKET FOR EXISTING TOUR COMPANIES IE: IS HORIZON CLIENTELE ONLY FROM 200 MILE RADIUS OF TORONTO FWD OUT!

Our Keewatin Tourist Exit Survey was administered to travellers aboard the regularly scheduled flights of Northwest Territorial Air and Calm Air. Analysis of our findings soon revealed that the majority of these travellers were in Keewatin on business rather than for pleasure. Accordingly, 92% of these travellers originate primarily in Canada; 47% from the western provinces, 26% from the Northwest Territories and the Yukon and 15% from Ontario. Only 7% indicated their place of residence was in the United States.

Whether or not visitors chose to travel to the Keewatin on a tour, relative party sizes are small, usually composed of 1 or 2 individuals. In fact, a surprising finding from our survey is that a fairly high number of visitors (37%) travelled to the Keewatin on their own.

BUT WERE IN FACT THESE BUSINESS TRAVELLERS.

The majority of tourists on organized tours are retired or senior citizens. However, those we surveyed were clearly from younger age groups; about 70% are under the age of 40.

WHY WOULD THIS BE?

A disparity of findings also exists with respect to average income levels of visitors to the Keewatin. Those on tours usually have above average incomes whereas those not on tours that we surveyed appeared to have average to slightly above family incomes.)

- BUT THESE WERE BUSINESS TRAVELLERS?

In summary, visitors to the Keewatin can be divided into two groups each having distinct characteristics. One is the actual tourist group which is small and comprises individuals who are usually senior citizens or retired, have an above average income and are primarily from the U.S. The other group is composed of Canadians travelling to the Keewatin for business reasons and who are younger and have more modest incomes.

THEY INDICATED PREVIOUSLY THAT ONLY 7% WERE US RESIDENTS AND HERE THEY SAY TOUR GROUPS ARE PRIMARILY US.

The Majority Visitors to the Keewatin are Travelling on Business

Our survey demonstrated that only 3% of those sampled were actually on a commercial tour or package. The vast majority (76%) indicated the primary reason for the trip was for business. Others mentioned visiting friends and relatives (9%) and fishing or hunting (6%). Our finding regarding the proportion of business visitors generally concurs with information contained in the

these are business only.

Previously stated that 50-100 persons visited the 10 fishing lodges but here it would appear that fishing is a small part of visit.

these are pleasure travellers.

"Keewatin Region Economic Base Study" prepared by H.J. Ruitenbeck Resource Consulting Limited in March 1983. According to the study, approximately 75% of visitors to the Keewatin are travelling on business.

Figures from the guest book at the Tugalik Inn in Eskimo Point clearly support this finding. In 1983, out of a total of 466 visitors, only 3% were registered as tourists. Government visitors accounted for 59%, visitors on business accounted for 14%, 6% were airline employees and 18% were either medical staff or other unspecified.

Pre-Trip Information

According to our survey results, sources of information for trip planning appear to be varied. As expected, about 45% of visitors surveyed obtained their information through their employer or a government office; a portion of the latter may have been through the NWT tourism department. Travel agents or tour wholesalers provided information to 29% of visitors. Finally, airlines supplied details to 17% of visitors while 15% consulted their friends and relatives.

GOVT ROLE
WOULD APPEAR TO
BE IMPORTANT

IDENTIFY WHO
THESE AGENTS
ARE.

EXPAND
GUIDE
FULFILLING
THE ROLE.

A high percent of visitors (80%) felt the pre-trip information they received was adequate. Areas that were suggested for improvement included local on-site information such as attractions, accommodations, tour and food services or put otherwise, "information on what to expect in the communities".

Length of Stay in the Keewatin

As mentioned in a previous section, most visitors on organized tours either spend a day or a few nights in the Keewatin.

Because of the high proportion of people on business in the Keewatin, results derived from our survey indicate that 29% of our sample actually stays in the region for over 3 weeks. Over 50%, however, are in the area for less than seven days.

Destinations Selected by Visitors

Existing commercial tours to the Keewatin briefly visit Rankin Inlet, Baker Lake, Eskimo Point and Repulse Bay. Rankin Inlet is clearly the community most often visited. *— why?*

The results of our questionnaire regarding destinations visited in the Keewatin appear to reflect the location of government offices and regional services. Rankin Inlet, therefore, receives considerably more visitation than other communities. The results of the survey have provided us with data useful in the ranking of communities in order of their popularity with visitors (primarily business travellers):

- o Rankin Inlet
- o Baker Lake
- o Eskimo Point
- o Coral Harbour
- o Chesterfield Inlet
- o Repulse Bay
- o Whale Cove

Data on Visitor Expenditures in the Keewatin are Lacking

The Keewatin Region Economic Base Study arrived at an estimate of an average \$1 100 expenditure for all categories of visitors in the Region (during the summer of 1982).

An attempt was made to assess visitor expenditures in the Keewatin area in our tourist exit survey. We were able to arrive at a general idea of the amount spent by individuals. Unfortunately, the results cannot be used to estimate total visitor expenditure. (This objective would be met by conducting an economic impact analysis in the area.) *WHAT IS THIS ANOTHER \$0,000 STUDY THEY WANT — VIS-A-VIS 1.3% OF TOTAL NWT TRAFFIC*

According to the range of spending categories listed in our questionnaire, a split is apparent between higher categories and the lower ones. For example, 24% indicated they spent over \$1 500 while in the Keewatin while 30% indicated under \$250. The remaining 56% is fairly evenly spread between the following spending categories: \$250-\$500, \$500-\$750, \$750-\$1 000 and \$1 000-\$1 500.

Many Visitors Enjoy Sightseeing While in the Keewatin

DEVELOP
A PRODUCT
MATRIX

With the exception of limited organized trips, most tourists on packaged tours visit the Keewatin to sightsee or to experience the Arctic way of life in its broadest sense.

Likewise, the activity most frequently indicated on our exit survey was sightseeing (44% of respondents). Other activities or interests pursued in order of importance include:

DOES THIS
CONTRIBUTE TO
WHAT WHOSE
THINK RELATIVE
TO THEIR SALES
MESSAGE OF
SIGHTSEEING
OPPORTUNITIES

- o photography (40%);
- o buying handicrafts (37%);
- o fishing (29%).

INDICATED PREVIOUSLY
THAT 60% WERE PRIMARILY
INTERESTED IN FISHING
HOWEVER OTHER INTERESTS
(FISHING) ARE 29%

Activities undertaken to a lesser extent were:

- o hiking/backpacking (9%);
- o hunting (8%);
- o canoeing/kayaking (6%);
- o visiting historic sites (6%);
- o nature interpretation (6%).

Do all this
research based on
96 questionnaire?
What was methodology?
- Because they put so
much weight on their
information - there should
be more details on how
it was done - especially
given T&P's experience/failures
at numerous surveys!

Other activities not included on the questionnaire but listed by the visitors involved numerous unrelated general interests such as riding a honda, swimming, picnicking, visiting friends and relatives, camping and also working.

In terms of identifying activities potentially important to develop or promote in the Keewatin, the respondents on our survey were requested to indicate which activities they would have liked to participate in but did not. Many visitors indicated they would have enjoyed, in order of importance, fishing, visiting historic sites, hunting, canoeing/kayaking and photography. These choices reflect interests that could be used as indicators of future activities to be pursued in the Keewatin.

again fishing
comes out as
top but only
60% of respondents
indicate
fishing as
primary
interest

When asked why they did not participate in the above activities, the majority (61%) of respondents indicated lack of time as a reason. Other secondary reasons listed included:

- o lack of information/awareness;
- o inclement weather; and
- o lacked proper equipment/skills.

The Visitors Surveyed Appear to be Generally Satisfied With Services Within the Keewatin

The items the questionnaire dealt with in the attempt to gauge visitor satisfaction included:

- o the availability/quality of handicrafts;
- o accommodation;
- o food;
- o transportation to the area;
- o transportation within the area;
- o availability of supplies;
- o outfitters/guide services;
- o overall impression of the Keewatin Region; and
- o value for money spent in the Keewatin.

According to our findings, the level of satisfaction expressed by the respondents is considered quite high. However, the three areas that appeared to raise a few concerns were value for money (19% expressed dissatisfaction), availability/quality of handicrafts (15%), transportation within the area (15%) and availability of supplies (12%).

WEAKNESS, HOW DOES CONSULTANT PROPOSE TO OVERCOME THIS.

Visitors on organized tours also appear to have been generally satisfied with their experience in the Keewatin. The following is a list of their comments or the wholesalers more important feelings on the region as a tourist destination:

Assets

- o "good Inuit guides"
- o "enjoyed seeing wildlife"
- o "enjoyed seeing Inuit culture"
- o "Eskimo Point - highlight of trip"
- o "like the geography of the area"
- o "local residents friendly and welcoming (Baker Lake)"

again how can these we dramatize these positive attributes through promotional efforts

Problems

- o "problems with fog"
- o "whole tourism plant needs upgrading"
- o "lack of professionalism on behalf of outfitters and guides"
- o "overpriced for conspicuous lack of product"
- o "some communities are not attractive (dirty, look run-down)"

How does consultant propose to ameliorate these

Many Visitors Indicated They Would Like to Return to the Keewatin

For 52% of visitors surveyed through our questionnaire, this trip had been their first to the Keewatin. (All visitors on holidays vs on business responded that this trip had been their first to the Keewatin.)

NOT UNUSUAL

A significant 75% felt their expectations had been met. (More tourists as opposed to visitors on business were disappointed with the Keewatin overall than those tourists who felt their expectations had been met.)

? WHAT IS THIS

A majority (63%) expressed an interest in returning to the region. (Similarly, the majority of actual tourists expressed an interest in returning to the Keewatin.)

It must be stressed that the majority of these respondents were in the region while on business. Their willingness to return may be a reflection of future scheduled business trips with pre-arranged itineraries and expense accounts, etc. The reason this point has been brought up is that those tourists on organized packages have not indicated an interest in returning to the Keewatin. A visit to the Arctic is currently considered by most tourists a "once-in-a-lifetime" experience.

How do we CAPITALIZE ON THIS.

This leads to the observation that there are clearly two quite separate visitor markets in the Keewatin. The business market is certainly the most substantial at the moment. The second is the tourist market which is small and relatively undeveloped.

WHAT ABOUT VERTICAL TOURIST MARKETS SUCH AS FISHING, HUNTING, ADVENTURE ETC.

Since two general markets have been identified for the Keewatin, it could be feasible to develop marketing strategies that could target both. For example, since the majority of individuals who participated on our survey were visiting the Keewatin on business and felt they had not had time to pursue some recreational or tourism activities, an effort could be made to entice these travellers to combine pleasure with business and extend their holiday.

Conclusions

- o The Keewatin receives a small share of the tourists currently visiting the Northwest Territories and an equally small share of the economic benefits of tourism.
- o Those visitors travelling to the Keewatin are either on business (up to 75% of the total number of visitors) or part of organized commercial tours.
- o These two markets have different characteristics: visitors on tours are generally wealthier, more elderly and, for the most part, from the United States. Conversely, visitors not affiliated to a tour group are usually younger, part of a more average income group and primarily from the western provinces of Canada. *again where do they come from?*
- o Popular activities while in the Keewatin include sightseeing, photography, buying handicrafts and fishing.
- o Due to lack of time, the following desired activities are not pursued: fishing; visiting historic sites; hunting; canoeing/kayaking; and photography. The implication here is that visitors could potentially be attracted to the area to participate in such activities given an adequate holiday or extended business trip time frame.
- o On the whole, travellers to the Keewatin are satisfied with services. Those not on tours express a high interest in returning to the Keewatin. Those on tours, on the other hand, consider their Arctic holiday a once-in-a-lifetime experience. *WORK IS A WHOLE DIFFERENT SITUATION.*

4.3 Trends Analysis

4.3.1 - Societal and Leisure Trends and Implications for Tourism Development in The Keewatin Region

The travel industry and the North American population in general are becoming more and more concerned with the use of trends as a means of indicating future conditions. It is now generally recognized that the organization or operator who has successfully interpreted trends and accurately predicted future market conditions will be the survivor in an increasingly competitive world. Trend data are now provided by a growing list of public agencies and private research companies. Inevitably, the conclusions drawn by these modern-day oracles are often inconsistent in specific details. However, examination of a wide range of applicable trend data points quite consistently to a number of more general trends - demographic, economic, attitudinal and environmental - that will have a significant impact upon the tourism industry. These trends present both opportunities and constraints to tourism development and should be considered when planning for future development.

IDENTIFY
THESE

4.3.2 - Demographic Trends

a) The rate of population growth has slowed significantly.

The rate of population growth throughout most of Canada has been slowing steadily in recent years, a trend which is expected to become even more significant in latter years of the century. The present Canadian population growth is approximately 12% per decade according to the Financial Post Canadian Markets 1984.

The U.S. population growth rate reflects similar trends. The rate of population growth has decreased from 13% between 1960 and 1970 to just over 11% for the 1970-1980 period.

WHAT RELEVANCE
DOES DENMARK HAVE
TO THE KEEWATIN

The rates of population growth in international markets relevant to the Keewatin are substantially lower than those of Canada and the United States. Denmark, for example appears to have achieved zero population growth. Other countries' growth rates for the last 4-5 year period are as follows: Japan, 3.1%; Germany, 0.6%; the Netherlands, 2.5%; the United Kingdom, 0.5%; and Scandinavia, 0.7%.

Implications

In general, the tourism industry can no longer count on a rapidly expanding population to fuel its growth. Increased demand will, to some extent, have to be generated by cultivating interest and participation within a relatively fixed population. — THIS REALLY HAS NO BEARING ON THE KEEWATIN DUE TO IT'S EARLY PRODUCT LIFE CYCLE

b) Two main age groups will dominate marketplace.

Over the last 20 to 25 years, North America has seen two significant demographic manifestations of one basic trend - the aging of the population. First was the so-called baby-boom, the tremendous explosion in births which followed the Second World War between 1946 and 1964. The vast majority of these individuals born in the 1950's and early 1960's are now in their mid-late 20's and early 30's and are just entering the peak years of their income earning potential. Exhibit 4-1 shows how this group will be moving through, and dominating the population over the next 15-20 years. In 1981, 17.9% of Canada's population was between 35-44 years old. By 1991, 21.9% of the population will fall into this age range, and by 2001, 23.0% will be in this age class.

POPULATION
MAY BE SLOWING
BUT THE MARKET
SEGMENT SENIORS
LOOKS BRIGHT

Similar growth trends are being experienced in the U.S. where the baby-boom presently accounts for one-third of the population - 72 million people. In the 1980's, this generation of Americans will enter middle age, with the 30-to-34 age group growing 24 percent, the 35-to-39 age group growing 41 percent, and the 40-to-44 age group growing by 50 percent.

The second part of this trend is the continuing growth in the number of people 55 years and older - the senior citizens or older adult market. While this increase in numbers has been less obvious than that of younger age groups, there should be a very rapid expansion in absolute numbers of individuals of 55 years old and older in the late 1980's and 1990's. This level of growth is evidenced by the recent proliferation of magazines, television programs, consumer goods, and commercial enterprises targeted at this market. A recent survey indicated that Modern Maturity magazine (a periodical for older adults) has 9 million readers - more than Newsweek and Time combined.

EXHIBIT 4-1

Distribution of Population By Age in Canada 1971 - 2001*

	1971	1981	1991	2001
	%	%	%	%
20 - 24	14.5	14.5	10.3	9.3
25 - 34	22.1	25.4	25.1	18.6
35 - 44	19.3	17.9	21.9	23.0
45 years	44.1	42.2	42.9	49.1
Total	100.0	100.0	100.0	100.0

* 20 years old and older only.

Source: Statistics Canada: 92-520 Occasional.

The most rapid growth will be in the 65 years old and older group. Canada is likely to see a 28% growth in the number of such people between 1980 and 1990 by comparison with the projected 8.5% growth in the population as a whole.

Industrialized countries in the international market are also exhibiting signs of an aging population. All of the countries surveyed (Japan, Germany, the Netherlands, the United Kingdom, Norway, Denmark, Sweden and Finland) have aging populations according to shifts in proportions in major age groups. The 0-14 age group has decreased for these countries an average 2.5% over the last 5 year period while the 15-59 age group has shown an average increase of 1.1% and the over 60 age group has increased by an average 1.3%.

Implications

The years between 35 and 44 are peak earning years - the period of greatest disposable income. This rapidly growing group and their families will constitute a major market for the Keewatin tourism industry. The growing number of older adults, many of whom are taking advantage of early retirement programs, have the time and often the inclination to travel extensively. According to a recent survey of Canadians by the Print Measurement Bureau, in addition to the 35-49 age group, the over 65 age group is over-represented as a visitor group in the Northwest Territories. **This older adult market is an important target for fish camps and resorts and it may therefore be an important consideration in the development of the tourism industry in the Keewatin.**

DOES LODGE
INFO BEAR
THIS OUT.

c) Fewer families are being formed.

One of the main outcomes of the baby-boom generation has been a swing away from or a postponement of family formation. The average age of first marriage has increased significantly. Far fewer children are being born and childbearing is generally being delayed. Many more marriages are ending in divorce. In 1966, 11 000 Canadian marriages ended in divorce. By 1976, 50 000 did so; and this trend has gained momentum during the late 1970's and early 1980's. Divorced persons in 1981 had increased by 65 percent to 500 100 from 302 500 in 1976. The number of married persons declined in every age group between 1976 and 1981. This trend was most dramatic among young adults 20 to 29 years where it decreased by five percentage points to 54 percent of this group. One-person households increased by almost 40 percent between 1976 and 1981.

Consequently, there are many more non-family households. In 1971, 16.1% of Canadian households were non-family - about 971 000 persons. By 1976, this number had increased to 20.1% of households or 1.4 million persons - an increase of 48% at a time when there was a 19% increase in household formation.

Implications

The growing proportion of non-family households - consisting of single, divorced or widowed individuals or common-law couples - will create a growing demand for special types of tourism and recreation opportunities. **The growth of a large singles population, often with large disposable incomes, is an important consideration for the tourism industry throughout Canada.**

d) The population as a whole is better educated.

The rapid rise in births during the 1950's and 1960's created a tremendous demand for educational facilities. Because the North American economy was relatively buoyant during this period, this demand was met by a huge expansion in the number of schools, universities and colleges. Consequently, the general population, but most importantly the prime market segment in the 30-44 year age group, is much better educated than the population of previous generations.

Implications

The better educated consumer tends to be more sophisticated and knowledgeable in his purchasing decisions, and tends to demand quality products and experiences. The members of the well-educated 30-44 age group are more likely than previous generations to have well-paying jobs that increase their disposable income and their importance as potential purchasers of tourism products.

e) The attitudes of the "Me Decade" are likely to persist.

Tom Wolfe labelled the 1970's the "Me Decade", a decade when many individuals devoted themselves to a search for self. It is generally believed that this trend is deeply entrenched in the North American psyche and will persist during the 1980's and 1990's.

The most important manifestation is a basic interest in satisfying the immediate needs of self and in self-improvement. Hobbies are pursued, interests outside of the workplace are given a higher priority, income is spent on experiences rather than being saved, and personal fitness becomes something of a necessity rather than a fad. Recreational education and skill learning are growing in popularity.

A recent survey, the 1981 Canadian Fitness Survey (published in 1983), shows that participation in recreational activities has risen significantly since 1976. In 1981, 77% of those surveyed (14 years of age and older) said they had participated in some sport during the previous 12 months as compared to 54% in 1976. Sixty-six percent had taken part in an exercise activity in the previous month, up slightly from 63% in 1976. Those surveyed in 1981 also expressed much stronger interest in beginning "exercise" activities - jogging, running, walking, cycling - than in "sport" related activities.

In spite of this continuing trend towards self-interest, the consumer of the 80's is increasingly practical and decreasingly self-indulgent. The economic recession has had the effect of making consumers more aware of the long-term value of their purchases rather than short-term enjoyment.

X

It has been suggested by recent travel industry trend analyses ~~recently~~ that the primary reason for the slow post-recession recovery in pleasure travel is that the consumer has been giving priority to the purchase of tangible goods rather than travel. Travel is now seen as a discretionary purchase rather than as an essential one with lasting value.

OTHER RESEARCH HAS INDICATED THAT TRAVEL WAS VIEWED AS NECESSARY THIS THE STRONG TRAVEL EVEN DURING THE RECENT RECESSION WHEREBY THEY GET THIS FROM

Implications

The key implication of this shift away from pure self-indulgence toward the demand for a travel experience with more lasting value and more practical application is that experiential vacations are likely to become increasingly popular. Vacations offering opportunities to allow individuals to participate in preferred hobbies, sporting activities or fitness programs are good examples of the kind of vacation which will be selected over more traditional "sun, sea and sand" vacations offering limited stimuli and little long-term value.

We have examined this market for experiential activities in greater detail in Section 4.4.

f) **We are moving in the dual directions of high tech/high touch.**

This trend is one of the ten critical societal restructurings analyzed by John Naisbitt in his internationally acclaimed book Megatrends. "High tech/high touch" is a phrase being used to describe the way modern society is responding to technology. At a time when many are feeling alienated and depersonalized by the computerized technology that has permeated almost every aspect of life, the response has been to attach greater importance to more "human" values - towards those things that confirm our uniqueness as human beings.

Implications

The high tech/high touch response - the tendency to want to compensate for a highly automated world by emphasizing the things that cannot be done by a machine, the things that are "unprocessed" and uniquely human - is resulting in a demand for highly personalized services and distinctive products. In the travel industry, this trend is partially responsible for such phenomena as "Connoisseur Class" airline services, bed and breakfast networks, vacation farms, the popularity of ethnic restaurants and natural foods, the growing interest in heritage buildings, antiques and tall ships, and the quality art now being found in high-priced hotel rooms.

The Keewatin ^{not correct!} District is a prime example of a travel destination that could attract a market searching for a "humanizing" vacation. The community-based tourism approach preferred in the NWT stresses the participation of the local residents in various programs such as "visit a northerner" and several cultural presentations highlighting drum dancing, art work, Arctic games and other activities. Thus the visitor is encouraged to participate in the community network goings-on and experience Northern life first-hand.

How do they
integrate this
in actual plans

The high tech/high touch response will be a major shaper of future travel demands and should be considered in any new tourism development.

4.3.3 - Economic Trends

a) **The North American economies are in trouble.**

The 1950's and 1960's witnessed a tremendous expansion in the North American economies. The 1970's saw uncontrolled inflation and a rapid oscillation in the performance of the economies stemming largely from the steep rise in energy prices. The 1980's are likely to see under-performing economies, with relatively high unemployment and uncertain consumer and investor confidence.

Although the U.S. economy is growing stronger each day, this is generally at the expense of its weaker trading partners. Rising interest rates and a strong currency in the U.S. are seriously undermining the Canadian dollar and exerting tremendous upward pressure on our interest rates. While the recession appears to be over in the U.S., there are serious concerns about a return to an even deeper recession here in Canada. A Progressive Conservative Party task force report released recently suggested that unemployment will remain above 10 percent until the year 2000 regardless of any remedial steps that the government and/or industry might take.

b) **Disposable income is not growing.**

It has long been evident there is a strong relationship between the volume of travel and the level of personal disposable income. The more disposable income a person has, the more is spent on major consumer durables, and on luxury goods and services such as expensive vacations.

The 1950's and 1960's saw a considerable expansion in the level of per capita disposable income. There was little inflation, and real incomes grew substantially. As Exhibit 4-2 shows, this trend persisted into the early and mid-1970's.

However, since 1979, Canadians have seen virtually no growth in the level of per capita disposable income. Between 1971 and 1979, the average Canadian's disposable income grew at about 4% per year in real terms. Between 1979 and 1982, it grew at about 0.15% per year. This slow growth

or non-growth of disposable income is likely to be maintained. Furthermore, the growing number of people on fixed incomes (most commonly senior citizens living on pensions) are seeing their buying power shrink.

EXHIBIT 4-2

Level of Per Capita Disposable Income in Canada 1961-1982

	Current Canadian Dollars	1971 Canadian Dollars
	\$	\$
1961	1 475	n/a
1971	2 779	2 779
1979	7 286	3 810
1982	9 798	3 827

American per capita disposable income grew by .8% in the last quarter (spring '84).

This trend is also in evidence in international market areas.

The trend is not so marked in the U.S.A. The Americans have been more successful than the Canadians in reducing the rate of inflation, which means that the purchasing power of an individual's dollar is likely to be stronger there than in Canada. Even so, a recent study showed that U.S. citizens have an average disposable income (after housing, food and clothing are paid for) of two dollars per person per day.⁽¹⁾

c) Inflation is not likely to go away.

The level of disposable income is directly affected by the rate of inflation. Relatively high levels of inflation are expected to continue for at least three to five years, if not for the remainder of the decade, a condition caused, to a great extent, by government borrowing requirements and by

(1) Thomas F. Maxey. "America's Heartbeat and How to Touch It". Paper presented at the Travel and Tourism Research Association Conference. Philadelphia, June 1984.

the pressure of high U.S. interest rates. A return to a 16% prime rate is already being seen as a possibility by the end of 1984. As long as the economy is depressed and government revenues from business, trade and personal income tax are reduced, governments will have to borrow. This borrowing will continue to keep interest rates high and reduce the stock of capital available for investment. All this, in turn, means it will be a long time before the economy recovers because funds are unavailable to initiate either an investor or consumer led recovery.

It is worth noting here that between the second quarter of 1981 and the same quarter of 1982, the Travel Price Index (seasonally adjusted) rose by 14.9%. The cost of gasoline rose by 24.4% and the cost of private transportation rose by 14.8%. These hikes are considerably higher than the general rate of inflation for that period.

Most recent statistics indicate the continuation of inflated travel costs. Between the first quarter of 1982 and the same quarter of 1983, the Travel Price Index rose by 8.5% as compared with a Consumer Price Index rise of 7.6%. Within the same period, the Gross Domestic Product - an indicator of the health of the Canadian economy - declined by 2.6%.

d) The affluent years of the 1960's will not return.

Many reputable forecasters believe that there is very little likelihood that in the next 20 years Canada will again experience the fortuitous combination of circumstances which led to the prosperity of the late 1950's and 1960's. During those years, the labour force and population as a whole were growing, energy was both cheap and readily available, capital for investment was again both cheap and easily available, and inflation was practically non-existent.

Existing conditions - slow, if not stagnant population growth, high interest rates, high unemployment rates, high levels of inflation, high levels of government expenditure, and high energy costs - are likely to inhibit economic performance in Canada for some time to come.

Implications

Low consumer confidence, high levels of unemployment, and economic "stagflation" make travellers extremely price sensitive and value-conscious. (Value for money spent will become a key factor in the purchase of any travel experience.)

How IS THIS REFLECTED
IN THE PACKAGES THEY
SET - UP.

Consumers able to get ahead of inflation are either saving their money or spending it on what are considered to be "essentials" - appliances, motor vehicles, homes, etc. The challenge to the travel industry is to make itself perceived as an essential consumer good providing long-term value.

High interest rates, an uncertain market and high energy costs have reduced investor confidence and have limited the number of people who are willing to make capital investments in improved or expanded tourist facilities. Greater incentives are becoming necessary throughout the country before such investments are made.

4.3.4 - Environmental Trends

Two environmental issues will be significant in the coming decades - energy availability and the introduction of new technology.

- a) **North America may continue to be vulnerable to energy availability during the 1980's and 1990's.**

Over the past decade, the North American consumer learned that he could no longer depend on a readily available supply of inexpensive energy. The glut of oil that lowered prices in late 1982 has been exhausted and oil prices are at an all-time high. Canadian political leaders are now proposing to raise Canadian oil prices to world levels, pushing gas prices still higher.

Implications

High energy costs have resulted in a careful use of energy. For the tourism industry, this means shorter trips, greater use of mass transportation modes and a tendency towards single-destination trips as opposed to

touring/multiple-destination trips. High Canadian travel costs have had a tendency to counteract the benefits derived by the Canadian tourism industry as a result of the lower value of the Canadian dollar relative to U.S. currency.

b) New technology is expanding rapidly.

The next ten years will see a tremendous growth in the application of new technological developments. How this will impact travel is difficult to say. But one key factor is that much of this new technology is competing for the entertainment dollar at a time of little, if any, growth in personal disposable income. Video cassette recorders, cable T.V., pay T.V., satellite dishes, home computers, computer games and digital record players could reduce spending on entertainment outside the home.

Another key factor is that the new technology will make information much more readily available to the consumer.

Other technological influences include the use of new communications systems for conferencing and training purposes, thus reducing the need for business related travel; and the use of home computers to enable employees to work at home.

Implications

Competition from a vast array of high-tech home entertainment items will undoubtedly create greater demand for a **high quality** travel experience - an experience at least comparable to what can be enjoyed at home. On the other hand, increased media distribution generally makes for a more sophisticated market, a market with increased interest in cultural activities and stimuli (e.g. concerts, plays, historic sites, museums, etc.). **The travel market can therefore be expected to demand higher quality experiences and facilities as well as experiences with somewhat more substance than is generally offered by the traditional "sun-sea-sand" holiday.**

How does ~~REWARD~~
OFFER A "QUALITY"
EXPERIENCE IS COSTUMED
AUTHENTICITY. ETC

The improved access to information made possible by new technology will, also create a demand for higher quality travel experiences. Alternatives can be more closely examined, enabling consumers to make more informed travel decisions.

While the use of conference calls, video equipment and modems is making business travel less and less necessary from a functional standpoint, the growing emotional discomfort with modern technology - previously discussed as the "high tech/high touch" response - is making business travel increasingly necessary from a human standpoint. At a time of growing isolation and alienation in the workplace, the need for human contact is becoming increasingly important.

Summary of Implications for the Keewatin

It can be seen that the patterns of leisure, recreation and tourism all over the world are undergoing an enormous change. The travel explosion of the last two decades, generated by rising incomes and rising expectations, has ended and the travellers of the 80's, while continuing to place a high priority on travel, are forced to cope with a recessionary and uncertain economic climate. These new travellers are more diverse in their interests, more discriminating, more demanding and more value conscious.

Tourism development in the Keewatin ^{Region} District must cater to the tourist of the 80's, providing value for money for an increasingly sophisticated market as well as an increasingly segmented market in terms of specific interests, demands and expectations.

MAKE SURE CONSULTANT IDENTIFIES CLEARLY THESE SEGMENTS. AND HOW THEY ARE REFLECTED IN PROGRAMS.

4.3.5 - Travel Trends

International travel showed steady growth in the 1960's and 1970's.

Herman Kahn, the much-quoted world futurist, believes that by the year 2000, tourism will become the world's largest single industry. Even now, the level of tourism spending is staggering. Total world spending for domestic and international tourism, reported to be \$580 billion in 1979, is projected to increase to \$992 billion (in constant 1979 dollars) by 1989 - a growth of 6.5% per year for international travel and 5.0% per year for domestic tourism spending.

The World Tourism Organization has reported that between 1960 and 1980 the number of international tourism arrivals worldwide grew from 71 million persons to 285 million persons, an average growth rate of 7.25% per year.

In spite of these optimistic forecasts, more recent statistics present a definitely more gloomy picture. The World Tourism Organization showed a 3.7% decline in international receipts between 1982 and 1983, although arrivals were up by 2.4%. This is the first decline in about 20 years. Among other travel indicators, minus year-to-year declines appeared in distance travelled by airlines worldwide, air travel on the North Atlantic route, Caribbean cruise arrivals and hotel occupancy. Among monetary indicators, the average daily rate per occupied room dropped sharply throughout the world.

While many travel researchers insist that 1983 represented the bottom of the trough of economic recession, it is evident from current economic reports that economic recovery is taking place primarily in the U.S.A., and that the travel activities of other international travel markets will remain depressed as long as international economies fail to grow.

Trends in the Major Geographic Markets for the Keewatin District Region

As was mentioned in an earlier section, Canada itself generates by far the greatest number of visitors to the Northwest Territories in general and also to the Keewatin. American visitors account for the second greatest percentage of visitors to the area with European and Far East visitors comprising the balance.

Because they ^{Region} represent the greatest potential for market growth for the Keewatin District, the travel trends observed in Canada, the United States and other international markets will be examined more closely in this section.

a) Canadian Travel Trends

Travel by Canadians fell significantly in 1982.

Canadians are widely known as being among the most avid travellers in the world, averaging about five trips of greater than 80 km (50 miles) one way per person per year. However, taking into consideration the 25% of the adult population that does not take a trip of 80 km (50 miles) or more in any one year, travellers within Canada are averaging about seven trips per year.

Does this domestic travel also international? - both?

look at distance between communities and travel action! the VFR

While it is difficult to track trends in domestic travel during the 1970's (due to lack of data), it appears that the number of trips taken by Canadians increased steadily during this decade. Indications are that at the turn of the decade, the volume of travel stabilized, and in 1982 fell significantly - down 8% from 1980. Exhibit 4-3 shows the trend in Canadian travel for the first and third quarters of the years 1979-1982.

As the table shows, travel by Canadians within Canada during the winter months fell by about 6% between 1979 and 1980 but has stabilized since then at approximately 21 million person-trips. This travel comprised about 18% of all trips taken by Canadians in 1980.

The most significant feature of the table is the 10% drop in 1982 of the number of trips taken by Canadians within Canada during the summer months. This is traditionally the time of year with disproportionately high levels of trip taking. Nevertheless, more than half the population of Canada took at least one trip of 80 km or more to a Canadian destination during the summer of 1982.

EXHIBIT 4-3

Volume of Canadian Person-Trips 1979-1982

	Jan. - Mar. (000s)	% Change	July - Sept. (000s)	% Change
1979	23 138	-	39 681	-
1980	21 802	-5.8	39 894	0.5
1981	21 832	0.1	39 396	-1.2
1982	21 227	-2.8	35 538	-9.8

Source: Statistics Canada, Canadian Travel Survey.

Seventy-five percent of all trips by Canadians are to destinations within Canada.

The vast majority of trips taken by Canadians are to destinations within their own country (Exhibit 4-4). On average, 75% of all trips taken by Canadians are to destinations within Canada, a further 24% are to destinations in the U.S.A., and only about 1% are overseas.

The 1970's saw relatively strong growth in Canadian visitation to U.S. and overseas destinations. The number of Canadians visiting the U.S.A. increased by 25% between 1972 and 1981, a 2.5% annual growth rate. However, visitation peaked in 1977 and since then has been declining steadily, apart from a small upturn in 1980.

Similarly, the number of Canadians visiting overseas destinations increased by 35% over the same period, a 3.5% annual growth rate. But, again, overseas travel by Canadians reached a peak in 1978 and has been declining since then, falling by 6% in 1982.

It can be expected that Canada's presently weak dollar will seriously inhibit travel to U.S. destinations while increasing the propensity to travel within Canada or within countries with similarly weak currencies.

→ *conversely it should enhance Canada as a travel
EXHIBIT 4-4 *again to foreigners.**

Volume of Travel by Canadians 1980-1982
(Person-Trips - Same Day and Overnight)

	1980		1982		% Change
	000s	%	000s	%	
To Canadian Destinations	110 996	75.3	101 641	74.5	-8.4
To U.S.A. Destinations	34 743	23.6	33 322	24.4	-4.1
To Other Countries	1 585	1.1	1 489	1.1	-6.0
Total	147 324		136 452		-7.4

Source: Statistics Canada. Travel-log, Catalogue 87-003, Vol. 2, No. 2, July 1983.

Implications of Canadian Travel Trends

In spite of the recent decline in international travel by Canadians, many have travelled extensively with the effect that many Canadian tourists have become more sophisticated in their travel demands. They are more aware of the quality and variety of tourist products being offered outside of their country and have become more demanding in terms of their requirements.

This is reflected in a finding of the 1981 survey of Vacation Travel by Canadians. The survey found that, while Canadians felt their own country far outranked the U.S.A. in providing the environment for a quiet countryside vacation and in offering a variety of outdoor activities in winter, more Canadians felt the U.S.A. offered better value for money in hotels and motels by comparison with those in Canada.

b) U.S. Travel Trends

1983 marks the first year in this decade in which the U.S. showed a travel deficit, i.e. expenditures by U.S. residents outside the U.S. exceeded expenditures by non-residents travelling in the U.S. According to the U.S. Travel Data Centre's Traveltab 1984, U.S. visitation to Canada grew by 2.5% between 1982 and 1983 and U.S. spending in this country grew by 11.6% between those years. In spite of this growth, U.S. travel to Canada has not fully recovered from its recessionary malaise. Annual percentage change from 1978 to 1983 still shows a drop in visitors of 1.4%.

Visitation to Canada is not likely to grow to the levels it achieved during the early 1970's. **Destinations within the U.S.A. itself are becoming more popular and are being much more aggressively marketed.** State tourism agencies are expending greater funds and efforts to retain their domestic markets. The U.S. resident is now much more aware than previously of potential alternatives to Canada.

Key U.S. travel markets are similar to those in Canada.

Growth will occur in specialty markets. The U.S. tourist is becoming more sophisticated and wants to indulge in hobby-style vacations. The rapid rise

in popularity of tennis camps, river rafting, photography tours, and scuba diving vacations during the mid and late 1970's all point in this direction.

Key market segments will be middle and upper income families in the 30-44 year age category - the aging baby-boom generation. As in Canada, this market demands high quality, distinctive, value-for-money vacations.

Implications of U.S. Travel Trends

The overall weaknesses in the U.S. market for Canadian travel destinations as well as the considerable efforts of U.S. destinations to retain their domestic markets means that the Canadian destination hoping to attract a U.S. market will have to offer a unique, high quality resource, promoted through skillful packaging and marketing. Specific market segments with special interests will have to be targeted as opposed to the general tourist market. The attraction of Canadian destinations must be based on something other than the poor state of the Canadian dollar relative to U.S. currency in order to ensure a strong tourism industry.

SHOW
BILL TAIT
REGARDING
THIS COMMENT
ON MARKET
mass style

c) International Travel Trends

The trends affecting U.S. and Canadian travel are also reflected in overseas travel trends. Overall, the global economy, energy and political situations have resulted in a diminishing rate of increase in international tourist arrivals and revenues. Although this trend has been in evidence throughout the first part of the 80's decade, it is expected that the underlying strength of Canada as a holiday destination will maintain and possibly increase Canada's share of the international market. At a time when value for money is an overriding factor in choosing a holiday destination, the position of Canadian currency relative to other international currencies makes Canada an attractive option as compared to the U.S., specifically.

In addition to the above, Canada boasts a relatively stable economic, social and political situation and, most importantly, attractive outdoor/"wilderness" tourism resources. Outdoor adventures/activities in Canada currently make up the dream vacation of most overseas target groups.

How do we capitalize
on this opportunity.

In terms of arrivals recorded,¹⁾ the following overseas countries have been ranked in order of importance as tourist generating countries for 1981.

Rank		Arrivals in 1981
1.	United Kingdom	540 588
2.	Federal Republic of Germany	241 024
3.	Japan	146 461
4.	France	136 871
5.	The Netherlands	87 910

1) Source: International Marketing Manual 1983, Rendez-Vous Canada.

Although France is third in rank of importance for Canada overall, few French visitors visit the N.W.T. Germany, on the other hand, generates the largest proportion of visitors to the Territories. It is worth noting also that although the number of visitors from Hong Kong is still low, this group is growing at the most rapid rate: 19.7% between 1981 and 1980. Visitors from Israel and Mexico are also increasing in number at rapid rates, 13.6% and 18.6% respectively.

Some of the perceived problems inhibiting the growth of the overseas market are image, cost and tour development related.

How do we get around this through programming?

According to Rendez-Vous Canada's 1983 Marketing Guide, Canada has a very low "share-of-mind", "unlike the U.S.A. which is constantly in the news. The main negative perceptions of Canada are that it is bland and dull, cold and unmanageably large, a wilderness", (p.54). Although our dollar is competitive as compared to the U.S. dollar, the strengthening of Canadian currency against overseas currencies combined with substantial price increases in travel facilities and services in Canada, have resulted in a lowering of our standing with foreign wholesalers and operators as a profitable destination. This simply enforces the general travel trend of

holidaying closer to home.

How does profitability enter into the situation with wholesalers selling? What is the threshold? How do they give up on one elsewhere?

The continued development of tour products in Canada will undoubtedly attract a generally more sophisticated and value conscious overseas market. The development of wilderness adventure packages is especially attractive to these tourists and particularly relevant to the Keewatin.

Implications of International Travel Trends

Overseas visitors are influenced by similar travel trends reflected in North America. Therefore, in order to increase the level of international visitation to the Keewatin, priority will have to be placed on providing value for money, experiential oriented opportunities.

ARE THESE REFLECTED IN PACKAGES MMM HAVE PROPOSED?

4.3.6 - Summary of Implications for the Keewatin District Tourism Industry

Within the context of developing travel trends, the tourism industry within the Keewatin must have the following characteristics:

- o All facilities and attractions, especially accommodation establishments, must give value for money.

MAKE SURE IDENTIFIES CONSULTANT PROVIDES DETAIL ON THESE

The tourism industry must be directed towards the attraction and satisfaction of specific target markets - primarily those with special interests for which there are appropriate resources in the District.

Region

- o The tourism industry must offer a unique and distinct vacation experience not available elsewhere and certainly not available within the same travel radius from target markets.

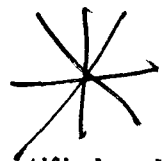
HOW HAS THE CONSULTANT DEALT WITH COMPETITION FROM OTHER NWT ZONES.

- o The industry must cater to a relatively sophisticated market which is demanding more than the traditional "sun-sea-sand" vacation.

WHAT EXACTLY ARE THE IMPLICATIONS FOR KEEWATIN OF THIS MARKET

4.4 Identification of Specialty Markets

In previous sections, we identified those countries which are expected to generate the greater part of total visitation to the Keewatin - i.e., the United States and Canada. However, the populations of these countries are so great and their interests and travel characteristics are so diverse that there are obviously considerable advantages in directing product development and promotion to appeal to specific market segments.



MUCH GREATER
WORK SHOULD
HAVE BEEN
DONE HERE
IS PRIMARY
& SECONDARY
RESEARCH
OF ADVENTURE
TRAVEL CLUBS

Therefore, as a further step in our market analysis, we identified and explored potential tourist target market groups. The selection of these target groups was based on our previous experience with similar studies, on a review of readily available published data, and on our preliminary analysis of the Region's existing and potential ability to attract and support these markets. They represent significant and relatively homogenous groups towards which tourism marketing and facility development programs could be easily targeted.

Eight specialty market groups were identified and subsequently analysed to a greater level of detail. These eight market groups were viewed as having the highest potential economic impact in terms of tourism expenditures and development opportunities generated.

They were also those with which the Keewatin's resources appeared to be most compatible.

This more detailed investigation involved numerous telephone interviews with relevant local, territorial, national and international associations, public officials, facility operators and tour wholesalers as well as a more comprehensive review of available secondary source data.

The selected specialty markets included:

- o fishing market (fishing camps, trophy fishing);
- o hunting market (big game);
- o remote naturalist lodges market;
- o photographic safari market;
- o general interest package tour market
- short-term fly-in market;
- o adventure travel market; and
- o arts/cultural/historic tour market.

TOP THREE ARE NOT COMMUNITY BASED ACTIVITIES. PACKAGING WOULD BECOME IMPORTANT TO HAVE COMMUNITY INVOLVEMENT ALSO THIS WOULD AFFECT PRICE WHICH HAS A DIRECT EFFECT ON SALES.

X These market groups have relatively distinct characteristics in terms of composition, preferences and trends. These characteristics are defined and discussed in the following pages in sufficient detail to permit the identification of those with greatest potential and those to which the tourism development strategy in the Keewatin will be targeted.

In most cases, each market is discussed according to its potential and characteristics, the capability of the Region's resources to accommodate/attract that market, and the implications for tourism development in the Keewatin.

We want to emphasize that the following are **general** market segment analyses and that it is, as a rule, impossible to estimate the actual size of each market group for a destination without first having a clear idea as to the nature of development at that destination. **This is only a first step.** It enables us to examine the likelihood of attracting a specific market group given market trends and requirements, and to narrow the possibilities for development.

*already
this gets
them of
the hook
for
details!*

4.4.1 - Sport Fishing Market

Market Characteristics

X The sport fishing market in the ~~District~~ of Keewatin was investigated by contacting outfitters, lodge operators and several hunting and fishing associations. We contacted operators and outfitters both in the Keewatin and adjacent areas so the general characteristics of the sport fishing market could be identified. This helped us to define the potential of the Keewatin as a destination for tourists interested in fishing activities.

Telephone interviews were carried out with the owners or marketing representatives of:

- o Angler and Hunter - Ontario's Wildlife Magazine
- o Arctic Adventures (La Federation des Cooperatives du Nouveau Quebec)
- o Bennett's Fly-in Lodges, Thompson, Manitoba
- o Boone & Crockett Club, Alexandria, Virginia
- o Foundation for North American Wild Sheep, Cody, Wyoming
- o Grande Domaine Retreats, Lincoln, Nebraska
- o Grosvenor Lodge, Alaska

- o Kasba Lake Lodge, Parkersville, British Columbia
- o Kulik Lodge, Alaska
- o Lynx Tundra, Hay River, Northwest Territories
- o Norcan, Timmins, Ontario
- o Obre Lake Lodge, Lynn Lake, Manitoba
- o Ontario Federation of Anglers and Hunters, Inc.
- o Snowbird Lake Lodge, St. Paul, Minnesota
- o SOTOUR Inc. (Societe de Tourisme de la Baie James)
- o Tourism Saskatchewan
- o Wollaston Lake Lodge, Minneapolis, Minnesota

Sport fishing can be defined as non-commercial fishing activities including fly fishing, angling, trolling, dip netting, spear fishing, bow fishing and bait fishing. In Canada a 1982 survey indicated that approximately 6 300 000 Canadians travelling in Canada participated in fishing or hunting activities. In terms of fishing and hunting activities by province residents of Ontario, Manitoba, Alberta and British Columbia undertake these activities most frequently.

In the Northwest Territories only fly fishing, angling and trolling are legally acceptable means for sport fishing. Currently there are two types of angling licences: the resident sport fishing licence available to all persons who have resided in Canada for a period of not less than six months; and the non-resident licence. According to a 1982 study,⁽¹⁾ sport fishing licence sales in the Northwest Territories grew from several-hundreds in the late 1950's to several thousands in the 1960's to over ten thousand by the mid-1970's. As indicated by the table below, sales of fishing licences has continued to steadily increase.

(1) Topolniski, D. 1982. Regional Income Analysis of Northwest Territories Fishing Lodges. Canadian Department of Fisheries and Oceans.

EXHIBIT 4-5

NORTHWEST TERRITORIES SPORT FISHING LICENCE SALES

Year	Total Licences	Resident Licences	Non-resident Licences
1954-55	133	27	106
1959-60	1 204	407	797
1964-65*	---	---	---
1969-70	5 209	1 355	3 854
1974-75**	10 668	6 723	3 945
1979-80	13 186	9 175	4 011
1980-81***	15 124	10 656	4 468

* No data available

** Definition of resident changed to include all Canadians

*** Estimated

Source: Topolniski, D. 1982. Regional Income Analysis of Northwest Territories Fishing Lodges. Department of Fisheries and Oceans. Table 1.

The primary interest of the fishing tourist is the quality of the fishing experience. This is supported by a recent survey of fishing lodge operators who indicated that the opportunity to catch large fish and the abundance of fish resources were the two most important factors in attracting clients to fishing lodges in the N.W.T.⁽¹⁾ As shown on the table below, these two factors accounted for 45 percent of the responses. The role of the fish is further evidenced by the inclusion of a third "fish attribute", the opportunity to catch unique species, by 13 percent of the respondents. In all, fishing attributes account for 58 percent of all responses while advertising and prices charged account for only 28 percent of all responses.

(1) Ibid.

EXHIBIT 4-6

FACTORS MOST IMPORTANT IN ATTRACTING CLIENTS
TO NORTHWEST TERRITORIES LODGE OPERATIONS

Factor	Absolute Frequency*	Relative Frequency
Opportunity to catch large fish	18	26
Abundance of fish resources	13	19
Operator's advertising efforts	11	16
Unique species	9	13
Prices charged relative to other operators in N.W.T.	8	12
Incomes of clients	4	6
Prices charged relative to operators outside N.W.T.	2	3
Travel Arctic and Canadian Government Office of Tourism advertising	2	3
Leisure time available	1	2
Changes in foreign exchange rates	--	--
	68	100%

* 2 responses were sought from each of 34 reporting units.

Source: Topolniski, D. 1982. Regional Income Analysis of the Northwest Territories Fishing Lodges. Department of Fisheries and Oceans. Table 33.

When the same persons surveyed were asked to identify three other market potential attributes which were important in attracting clients, fishing attributes (abundance of fish resources - 22 percent; unique species - 13 percent; the opportunity to catch large fish - 11 percent) accounted for 46 percent of all responses. The income of clients (13 percent) and operator's advertising efforts (11 percent) were also mentioned as important factors. The remaining responses, distributed over other factors such as pricing, government advertising, foreign exchange rates and available leisure time. No one factor represented more than 10 percent of the total response.⁽¹⁾

A general profile of tourists who currently travel to the Keewatin and adjacent areas to participate in sport fishing activities was derived from discussions with fishing lodge operators. Consistent with the 1982 study discussed above, persons who travel to the Keewatin for a fishing experience do so because of the size, abundance and unique species of the fish resource available. The remote location of the lakes and rivers to be fished and the opportunity to be one of a small number of persons who experience an Arctic fishing trip were mentioned as other factors which attracted fishermen.

While small numbers of women and married couples participate in sport fishing in the Keewatin, clients are more typically middle-aged males travelling in parties of four to ten persons. Up to 75% of these persons originate from the United States especially the mid-western states of Illinois, Michigan, Minnesota, Nebraska, Ohio and Wisconsin. The majority of the remainder come from Ontario, Manitoba and Saskatchewan with the occasional persons from Europe or South America.

Source: Topolniski, D. 1982. Regional Income Analysis of the Northwest Territories Fishing Lodges. Department of Fisheries and Oceans. Table 34.

Fishermen who travel to the Keewatin and adjacent areas generally possess above average incomes. This is indicated in part by the cost of a sport fishing trip (often equal to or more than the cost of air travel to the north) and in part by the fact that these fishing trips are generally additional leisure trips taken apart from other non-fishing leisure trips taken with family or friends. While these persons generally have above average incomes, they also expect full value for dollars spent. They want to know all costs of a fishing package up front and prefer that all accomodation, meals, transportation to the fishing lodge or camp site, and fishing related services such as the cleaning and storage of fish are included in the cost of a fishing package. Fishing tackle and gear, items of a personal nature (i.e., toiletries, tobacco, liquor) and special clothing are not expected to be included in these costs.

Market Potential

It appears that sport fishing as a leisure time activity is undertaken by a relatively small percentage of the Canadian population. It further appears that sport fishing in Canada declined slightly in the early 1970's but has not changed significantly since then.

As an indication of this trend, surveys of sport fishing in Ontario conducted in 1973 and in 1980 show that participation has declined in recent years. In 1975, there were 1 967 474 Ontario residents over 16 years of age who were active anglers. By 1980, this had declined by 12% - a fall of 2.4% per year.

Although they constitute a relatively small segment, the non-resident active angler population is more stable. In 1975, there were 646 250 non-resident active anglers in Ontario. Only about 4% of these were Canadians from other provinces. The majority of non-residents were from the U.S. - particularly from the East North Central region. In 1980, the non-resident active angler population had dropped by about 2% to 635 200 persons. This represents a decrease of 0.4% per year.

In the United States a similar situation prevails. A 1983 U.S. survey of household participation in leisure time activities by the Gallup Organization Inc. indicated that about 30 percent of all American households actively participate in sport fishing. The A.C. Neilson Survey of "Trends in Participation Sports" (1982) shows an unsteady four percent rise in resource consumption (hunting and fishing)

*Isn't that
definitive!*

recreational activities by Americans between 1978 and 1980. Those surveyed indicated a rise in participation in such activities while travelling from 40% in 1978-79 to 47% in 1979-80. In 1981 over 14 million Americans visited Canada for one or more nights.⁽¹⁾ Given the interest in fishing while travelling indicated above, this represents a potential of approximately 6.5 million persons who have an interest in a fishing experience as part of their travel to Canada.

Persons who undertake fishing activities on more than an occasional basis, frequently belong to fishing clubs or associations.

Membership in hunting and fishing associations appears to be increasing both in Canada and the United States. For example, the Ontario Federation of Anglers and Hunters, Inc. more than doubled its membership from 1979 (18 000 members) to 1984 (46 000 members) and anticipates an increase of an additional 24 000 members ~~of~~ 1987.

ACCESS
TO THESE
NAMES.
DIRECT
MARKETING
PROGRAMS.

The Foundation for North American Sheep is an American hunting and fishing association which has also experienced about twenty percent increase in membership since 1980. The Foundation currently has a membership of 4 000 and anticipates a 40-50 percent growth in membership for 1985. Most members earn well above average incomes and in 1984 the Foundation expects to raise approximately one million dollars to support their ongoing funding of wildlife management projects across North America.

The prestigious Boone & Crockett Club is the organization which sets all score cards and measurements for trophy fishing and hunting in the United States and Canada. Begun by the late American President Teddy Roosevelt, the Boone & Crockett Club is limited to 100 lifetime elected members. The members are almost exclusively middle-aged males with well above average incomes. The club designates trophy animals in well detailed categories. Fishing entries pertaining to Keewatin include lake trout, grayling and Arctic char. Accepted trophies are published in the records book, **Records of North American Big Game**, which, along with periodic newsletters, is widely distributed across the United States and Canada to affiliated clubs and associations.

(1) Source: Statistics Canada. **International Travel Section**, 1981.

Resource Capability

The Northwest Territories provides an impressive range of sport fishing opportunities. Freshwater area covers about four percent of the total land area in the numerous lakes and rivers.

X The principal species found in the Keewatin are Arctic Char, Arctic Grayling, Lake Trout, Walleye and Northern Pike. It is these species that attract the fishing visitor to the Keewatin. In particular, Arctic Char and Grayling are prized catches. Although relatively small fish by weight, averaging less than X 5-6 pounds, these are renowned for the "fight" which they put up when caught on a fisherman's line. Lake trout is perhaps the most reputable species due to the large size of fish caught.

X It appears that the attributes of the fish - size, unique species, large numbers, ease of catching - are the most significant sport fishing resource attributes in the Keewatin. The 1982 Federal Department of Fisheries and Oceans survey of fishing lodge operators in the Northwest Territories stated the importance of the fish resource accounted for 69 percent of clients attracted in the N.W.T. while northern landscape and wildlife accounted for only 12 percent and the quality of the accommodation a distant 7 percent.⁽¹⁾

Current Opportunities

While the Keewatin possesses an outstanding fishing resource base, the sport fishing market is presented with a varied and extensive selection of competing sport fishing opportunities. Canada's vast land base with its innumerable lakes, rivers and streams provides fishing opportunities across the country. Promotion of fishing lodges and outcamps in all provinces is well established by provincial departments of natural resources, tourism departments and regional fishing outfitters and tourism associations. Individual operators and lodges are teaming together with travel agencies, tour wholesalers and airline companies to put together packaged fishing trips. Additionally, many of these areas are accessible by road as well as scheduled air carrier. Following are several examples.

(1) **Source:** Topolniski, D. 1982. **Regional Income Analysis of Northwest Territories Fishing Lodges.** Winnipeg, Manitoba; Department of Fisheries and Oceans, Western Region.

There is a range of differences among remote fishing lodges both in the Northwest Territories and adjacent areas where intervening sport fishing opportunities occur. According to the 1982 Department of Fisheries and Oceans Survey, the lodges on Great Bear and Great Slave Lakes are larger than lodges in the remainder of the territories. While lodges on these lakes represent one-quarter of all such establishments in the Northwest Territories (11 of 41 lodges) they also represent nearly one-half of the total licensed bed capacity (378 of 780 beds). The bed capacity for these lodges ranges from 10 to 54 beds, with an average of 34 beds per lodge.

In contrast, bed capacity in the Keewatin is much smaller. Using a sample of eight Keewatin-based fishing lodges/outcamps from our telephone survey, it appears that, on average, these fishing lodge operations are much smaller than those located on Great Bear Lake and Great Slave Lake. While one lodge has the bed capacity for up to 40 guests, bed capacity for the remaining lodges ranges from 4 to 14 beds, with an average capacity of 11 beds.

The fishing lodges currently operating in the Keewatin offer rustic accommodation in small sleeping cabins which are sometimes as modest as wood framed sleeping tents. Carpeting, indoor plumbing, hot and cold running water and individual heating (usually with propane heaters) are almost always features of sleeping accommodation.

All meals and snacks are included in the price of fishing packages at all lodges operating in the Keewatin. Meals are generally served in a main dining area, prepared by a resident cook. An exception to this is Bennett's Nuelin Narrows Camp, a housekeeping camp where guests do their own cooking with groceries supplied by the camp operators. Providing guests with high quality food, freshly prepared in generous quantities, including homebaked breads and pastries is viewed as a critical service by all operators. Additionally, nearly all lodges provide liquor for sale to their clients.

In British Columbia, En Route Adventures offers a series of fly-out fishing packages marketed as "Charlie White's Fishing Adventures". White (a renowned salmon fishing angler, author and wildlife film maker) endorses the facilities and fishing tour packages offered to over 14 remote fishing lodges in British Columbia, the Yukon and on Great Bear Lake and Great Slave Lake in the Northwest Territories.

In Northwestern Ontario, Pat Sayeau's travel agency in Red Lake works with fishing lodges and camp operators to provide Red Lake Wilderness Fishing Vacations. Bookings for the lodges are handled by the travel agency as are travel arrangements to Red Lake. Detailed travel arrangements are absolutely imperative for European and American clients who require confirmation of travel routes and dates before entering Canada.

In Saskatchewan, the Northern Saskatchewan Outfitters Association works with Tourism Saskatchewan of the provincial Department of Tourism and Small Business to publicize, promote and organize fishing packages offered by the province's numerous lodge operators and outfitters. In one instance, the operators of Wollaston Lake Lodge work in conjunction with Tourism Saskatchewan to develop and promote fishing packages, including business seminars, and work closely with Crystal Shamrock Airlines of Minneapolis, Minnesota to promote and sell these packages.

Numerous other examples abound in Canada and many others exist in the United States where states such as Minnesota, Michigan, Maine, Colorado and Washington, to name a few, also possess significant fishing resources. For instance, Grand Domaine Retreats of Lincoln, Nebraska operates Morberg's Wilderness Fishing Lodge out of Stony Rapids, Saskatchewan, with its Keewatin camps operating as associated outpost camps. The lodge can be reached either by road or charter air carrier. Lounge facilities, nature trips and horse back riding are among the extras offered for persons accompanying fishermen (i.e., family members) who do not wish to fish. Grand Domaine also offers its clients the services and facilities of five other lodges which it operates in the mid-west American states as destinations for future vacations. Some of these other lodges offer hunting activities (i.e., elk, mountain goat, mule deer, grouse) in addition to fishing.

Conclusions

The District of Keewatin possesses outstanding fishing resources in its lakes and rivers and has the resource potential to support additional sport fishing activities.

*mentioned earlier
fishing has
stabilized.*

Continued growth in fishing and hunting organizations indicates an expanding potential market of persons with the inclination and the financial ability to pay for the opportunity to undertake a sport fishing trip to the Keewatin.

The competition for the business of existing and potential sport fishing clients is often well organized and promoted through public and private sector joint efforts. Operators and outfitters in intervening locations offer quality fishing experiences in remote locations. In some instances, road networks allow access to these facilities by car or truck. In nearly all instances, transportation costs to the lodge or outcamp is significantly less expensive than travel to lodges and outcamps in the District of Keewatin.

As a result, the emphasis of sport fishing activities in the Keewatin should be on the trophy size and abundance of the fish resource and on the Arctic fishing experience and the provision of quality services, accommodation and food.

4.4.2 - Hunting (Big Game)

Market Characteristics

The second type of the specialty tourism market we investigated was hunting for big game animals. Part of our research included examining the activities of the following:

- o Boone & Crockett Club, Alexandria, Virginia
- o Canada North Outfitting, Inc., Waterdown, Ontario
- o Foundation for North American Wild Sheep, Cody, Wyoming
- o Lynx Tundra, Hay River, Northwest Territories
- o Ontario Federation of Anglers and Hunters, Inc.
- o Qaivvik Limited, Yellowknife, Northwest Territories

The trophy hunting market shares many similarities with the trophy fishing market. Hunters who travel to the Arctic to hunt for big game such as polar bear, musk oxen and caribou are generally middle-aged male, with white collar, managerial or professional occupations and who earn well above average incomes. Hunters often hunt singly, with Inuit guides or in groups of two or three persons. Occasionally, hunting parties are composed of married couples or family groups.

*Contrary
to the
impression
left by
Maurice
Kauvre
on ACTA
study*

The length of hunting trips varies from 5-day trips to hunt muskox to 14-day polar bear hunts. Hunt costs are high ranging from about U.S. \$5 000.00 for a musk oxen hunt to U.S. \$15-20 000.00 for polar bear hunts, excluding air fare. Trips are generally offered all inclusive with the exception of air fare to the nearest major point of departure from the point of origin (i.e., Yellowknife) and items of a personal nature including guns and ammunition. Hunters travelling to the Arctic to participate in big game hunts do not want to pay extra for services during the hunt and expect good services and guides. As these people are coming to go out on the land to hunt, they expect to camp but expect dry, warm, comfortable accommodation and very plain, good quality, well prepared food.

The great majority of persons who have participated in Arctic big game hunts are American, with small numbers of Canadians and west Europeans comprising the remaining minority.

Market Potential

As a leisure time activity, hunting attracts a relatively small percentage of the population in both Canada and the United States.

According to the 1982 Canadian Travel Survey (released in 1984), just over six million person trips of over 100 million person trips taken by Canadians travelling in Canada were related to hunting or fishing activities. In the 1981 Canada Fitness Survey, hunting was not even listed as an activity in the top 18 recreational activities in which Canadians participate.

In the United States, a similar situation prevails. According to 1982 survey by "Trends in Participation Sports" by the A.C. Neilson Company (released in 1984) indicated an overall decrease of five percent in the total number of participants in hunting activities between 1972 and 1982. Additionally, a 1983 Gallup survey indicated that only 16 percent or 14 million of all Americans participated in some form of hunting as a lesiure activity.

It must be remembered that the figures cited above indicate participation in any type of hunting activity including small game (i.e., beaver, lynx, marten, otter, fisher, squirrel, raccoon, muskrat, weasel, fox, coyote, wolf, etc.), waterfowl (i.e. geese, ducks) and big game (i.e. bear, moose, deer).

Big game hunting almost invariably involves travel to remote wilderness locations, thus restricting participation to a smaller percentage of the overall number of hunting participants. The very high cost of travel to the Arctic, coupled with the high cost of big game hunting trips further restricts the potential market to a small, fairly exclusive and financial well-off market.

One of the most appropriate ways to access this market is through the small number of elite trophy hunting and fishing organizations. Most pertinent of these are the Foundation for North American Wild Sheep and the Boone & Crockett Club. While fishing comprises a small component of member activities as mentioned in the previous section, the greater emphasis of each organization is on the conservation and selected hunting of North American big game animals.

According to Mr. Tom Hinders, President of the Foundation for North American Wild Sheep, hunting big game animals is one of the primary interests of the club's 4 000 members. Most members earn well above average incomes, averaging over U.S. \$50 000.00 and a majority would be interested in package trips which would combine hunting several types of trophy animals or hunting and fishing. Promotion of packages could be through promotional prize trips offered at the Foundation's annual general meeting and trade show, through its quarterly newsletter and annual publication and through personal presentations and mailings to individual affiliated clubs.

GET
MORE
DETAILS

Canadian hunting and fishing organizations are another potential source for part of the big game hunting market. For example, the Ontario Federation ~~and~~ of Anglers and Hunters, Inc. has experienced a steady increase in membership, almost doubling in size since 1979. Current membership is 46 000 persons and projected membership for 1985 is 52 000 persons. Within this organization, it was indicated that a small percentage of members would have potential interest in Arctic big game hunting and an even larger group would have a potential interest in small game, specifically waterfowl, hunting.

Resource Capability

The ~~District~~ ^{Region} of Keewatin has outstanding trophy big game hunting resources. The region offers the big game hunting market a number of possibilities: land mammals such as polar bear, barrenland caribou, musk oxen; and marine mammals such as seal and walrus.

Current Opportunities

It appears that trophy hunting is a relatively recent activity in the Keewatin District and as such represents a very small percentage of the number of visitors who currently visit the area.

Canada North Outfitting, Inc. of Waterdown, Ontario has undertaken a number of hunts in the past few years.

Lynx Tundra of Hay River, Northwest Territories offer barrenland caribou hunting packages to only 14 hunters per season.

Competing opportunities for similar Arctic big game hunting are present in the Baffin and High Arctic Island regions of the Northwest Territories. Although it does not currently operate in the Keewatin District, Qaivvik Limited of Yellowknife offer Arctic sport hunts for polar bear, muskox, Peary Caribou and Barrenland caribou. Trips commence in Yellowknife and then generally travel to Melville Island or Holman Island for the hunts. Hunt packages are offered individually for each type of trophy animal. A combination polar bear-muskox-seal package has been offered.

Qaivvik hunt packages include: all air and ground transportation from Yellowknife to the hunting areas; a guided tour of Yellowknife; all accommodation and meals; Arctic clothing (caribou, made to size) or down clothing; trophy tags; two personal guides for each hunter with dog-teams or snowmobiles; and fleshing, salting and bagging of the trophy. Hunt packages do not include: transportation and arrangements to Yellowknife; licences, permits and trophy fees; personal clothing, effects and insurance; guns and ammunition; shipping of trophies, excess baggage from hunt area; and all gratuities, liquor, tobacco and personal items.

Cost?

Since the company was incorporated in 1977, Qaivvik has provided Barrenland caribou hunt packages for about 20 persons; Peary caribou hunt packages for about 8 persons; muskox hunt packages for about 8 persons; and polar bear/muskox hunt packages for about 12 persons.

Opportunities to hunt big game such as bear, moose, wild sheep, caribou or deer abound in nearly all of the Canadian provinces, and in a variety of American states such as Alaska, Washington, Colorado, North and South Dakota and Maine, to name a few and interest appears to be high.

How could we access these resources.

For example, in the fall of 1984, 1 000 hunters were chosen by lottery by more than 60 000 applicants from North America and Europe to take part in the annual six-day moose hunt season in Maine. The hunt was revived two years ago after 50 years of no hunting by law. About 800 hunters each year have gone home with trophies. Residents of Maine represent 900 of the hunters while 100 are non-residents.

WHAT WAS BREAKDOWN HOW MANY MAINE RESIDENTS INCLUDED

from(?)

total of 1000

In northern Quebec, La Federation des Cooperatives du Nouveau Quebec offer spring trophy caribou hunts and meat hunts later in the season.

Conclusions

X

The ~~District~~ of Keewatin ^{Region} possesses the wildlife resources to attract the big game hunting market.

Most participants in big game hunting activities earn well above average income and are willing to pay the costs required for the opportunity to hunt Arctic trophy-size big game.

Membership in relatively exclusive hunting and fishing organizations such as the Foundation for North American Wild Sheep appears to be stable with increasing membership anticipated. Such organizations represent the greatest concentration of potential participants in big game hunting activities in the Keewatin. These organizations also have information networks (i.e., membership mailing lists, quarterly newsletters) which, if properly accessed, could provide an important promotional function, reaching members in affiliated chapters and individually across the United States and Canada.

4.4.3 - Remote Naturalist Lodge Market

Market Characteristics

While fly-in fishing lodges and outcamps make up the remote lodge operations in the Keewatin, there are other remote lodges in adjacent areas which cater to devotees of the outdoors who are not attracted by fishing resources. To undertake an examination of remote naturalist lodges, we investigated the following lodges which currently operate in areas adjacent to the Keewatin:

- o Bathurst Inlet Lodge, Cambridge Bay, Northwest Territories
- o High Arctic International Explorers Services Ltd., lodge at Resolute Bay, Northwest Territories
- o Old Squaw Lodge, near MacMillan Pass, Northwest Territories

IS THIS TRULY
A NATURALIST
LODGE

A love of nature is a primary characteristic of guests who patronize remote naturalist lodges. Bird watchers, botanists, amateur geologists, amateur photographers, artists and history buffs are among the people who go to the expense and effort to holiday in the Arctic. Favoured activities include: bird watching; viewing wild flowers and the varied Arctic wildlife; hiking and exploring the unique geological features near which the lodges are frequently situated; nature photography; learning about local culture and history; and spending quiet time in observation, writing or meditation.

People who stay at remote naturalist lodges generally tend to possess above average incomes, although a small percentage of these are persons with average incomes who carefully plan and save for such trips. These people are frequently mature individuals (50+ years old), almost invariably with education beyond the secondary school level and employed in (or retired from) white collar, managerial or professional occupations. Individuals and couples are the most frequent guests with small groups of naturalists making up a small percentage of existing clientele. In addition, and in particular at Bathurst Inlet Lodge, guests accompanied by grandchildren is not an uncommon occurrence.

Remote naturalist lodges generally tend to be relatively small, accommodating at maximum between 15 to 20 guests at a time and only 80 to 100 guests in total during a six to eight week operation period. Facilities are generally modest, rustic log cabin style accommodations. Although rustic, the accommodation is comfortable. Services provided in weekly package rates include meals, transportation to and from the lodge location and the nearest airport and guide services to locating wildlife and local points of interest.

Market Potential

Interest in naturalist activities has been growing in recent years. The 1960's witnessed renewed interest in and concern for the natural environment throughout North America. This interest has remained in spite of the harsh economic pressures of the late 1970's and early 1980's and it is expected that large groups of people on both sides of the international border will be interested in participating in naturalist activities in the foreseeable future. As members who grew up in the 1960's and 1970's are now in their 30's and 40's, they will be looking for more comfortable, less physically taxing and more often family oriented ways of appreciating nature.

Potential markets with possible interests in Arctic wildlife history and scenery, would not only come from individuals but would also come from small special interest groups such as provincial federations of naturalist clubs (i.e., the Ontario Federation of Naturalists), societies interested in Inuit culture (i.e., The Arctic Society), national naturalist organizations (i.e., Canadian Nature Federation) and international organizations (i.e., the Audubon Society). Although memberships in these organizations is relatively small (i.e., Federation of Ontario Naturalists - 8 500 members; The Canadian Nature Federation - 12 000 members), they are either growing slightly or are stable and members have a long time interest in naturalist activities.

As mentioned earlier, the mature adult market - people of 55 years and older - has been steadily increasing and will expand rapidly in the late 1980's and 1990's. This small market comprises a significant proportion (up to 50 percent) of the membership of naturalist organizations. Members enjoy average to above average incomes and are able to afford the costs of travel to the Arctic or are highly motivated to give up other leisure activities to plan and save for such

excursions. Members are accustomed to mild physical activity which naturalist pursuits require and expect comfortable, clean but not necessarily deluxe accommodation in remote "wilderness" locations.

Resource Capability

X The diversity of physical, biological, scenic and cultural resources of the ~~District~~ ^{Region} of Keewatin are highly compatible to the development of remote naturalist lodge facilities. Rivers, cliffs and waterfalls and ground which is repeatedly frozen and thawed provide dramatic dimension and pattern to the landscape. Wildlife - most certainly caribou and musk oxen and an occasional Arctic fox, polar bear and Barren-ground grizzly bear - provide excellent opportunities for wildlife viewing and photography. Numerous bird species provide the opportunity for guests who prefer gazing skyward to view the region's wildlife. The ancient artifacts of the Keewatin's first peoples, the reminders of historic exploration and whaling expeditions and contemporary Inuit culture satisfy the special interests of these guests with cultural and historic interests.

Will they identify where to place the viewing?

Existing Lodges

X Remote resort lodge facilities can be developed in a number of ways, catering to needs and interests of different tourist groups. Development can be in the form of: a four season destination resort offering luxury (4-5 star) quality services, facilities and attractions on a year-round basis; a family oriented resort catering exclusively to family-oriented markets with affordable camp-like self-catering accommodation and facilities; and rustic lodge accommodation providing small-scale remote log cabin accommodation with appropriately low key support amenities. It is ~~into~~ this third category which describes the remote naturalist lodges in Arctic locations.

km?

X Oldsquaw Lodge is located 440 miles ^{km?} northeast of Whitehorse, Yukon in the Mackenzie Mountains in the Northwest Territories. The lodge consists of nine buildings - a two storey building housing a combination kitchen-dining room and upstairs observation lounge, five double-occupancy guest cabins, a bathhouse, a small storage shed and the personal cabin of the owner, Sam Miller, a wildlife biologist. Guest cabins are heated by wood stoves, have chemical toilets and

cold running water. The observation lounge, while appropriately rustic, has three walls of windows plus skylights, carpet and oak-parquet flooring, a stone hearth, propane lamps, a tape deck, a large bookshelf and a ~~small~~ wet bar.⁽¹⁾

Small

The lodge was started in 1982 and has operated at 60 percent capacity. The lodge is open from mid-June to early October. As many as 18 guests have been accommodated at a time, but the average number is 10 persons per week. Each guest pays \$125 per day for meals, accommodation and guided hiking and jeep trips across the barrenlands. Fishing, hiking, climbing, canoeing, observing wildlife and the landscape and watching the weather are favoured past times of visitors. While the majority of visitors are Canadian or American, international visitors have come from Chile, Germany and Scandinavia.

Bathurst Inlet Lodge is located at Cambridge Bay (Bathurst Inlet), N.W.T., a two-hour flight northeast of Yellowknife. Originally a Hudson's Bay Company trading post, the lodge was converted into a resort in 1969 by Glenn and Trish Warner. Facilities for accommodations and dining are housed within the one building. Although the setting is remote and the decor rustic, facilities are much more luxurious than at a lodge such as Oldsquaw. All inclusive weekly rates of \$2 000 per person include air charter to Bathurst Inlet from Yellowknife, accommodation, meals and guided tours.

Tours and activities have a naturalist and historic-cultural orientation. Excursions are offered for geological and scenic interests, bird watching, wildlife (including wild flowers) viewing and photography, Inuit and ancient Thule campsites and areas visited by the Franklin Expeditions of the 1800's.

Local Inuit serve as guides, maids and caretakers at Bathurst Inlet Lodge. The lodge is open for June and August and accommodates an average of 100 guests per season. Past guests have included Canadian Governors-General and Prime Ministers, members of the Federation of Ontario Naturalists and the Arctic Society, among others.

⇒ what about the lodge at Resolute Bay???

(1) Source: Robinson, Bart. 1984. "The Armchair Arctic" Equinox, Vol. III, No.13: 89-91.

Competing opportunities for remote Arctic naturalist lodges also exist in the Yukon, Alaska and Greenland.

Conclusions

The potential market for remote naturalist lodges is relatively small but is composed of individuals who are highly interested in exploring and undertaking naturalist activities in remote, wilderness locations.

Individuals who patronize remote lodges are able to readily afford or are willing to forego other luxury items in order to experience a unique and distinctive vacation experience at a naturalist lodge located in Canada's Arctic.

Vacation packages at remote naturalist lodges must include all costs and services up front. People are willing to pay top dollar for the opportunity to experience the Arctic's incomparable natural setting and to be shown local sites and culture. As a result, quality interpretive and guiding services are a necessity as ~~and~~ is an atmosphere of friendly hospitality.

4.4.4 - Photographic Safari Market

Market Characteristics

The photographic market can be considered a relatively small but dedicated market. The following associations and tour operators were contacted for further information on the characteristics and potential of the photographic safari market:

- o Ecosummer Canada, Vancouver
- o Camar Publications (Photo Life Magazine), Toronto
- o Great Expeditions, Vancouver
- o Thru-the-Lens Tours, Culver City, California
- o National Association for Photographic Art, Toronto
- o Victor Emanuel Nature Tours, Austin, Texas
- o Photo-Synthesis Inc., Saskatoon
- o Alaska Photo Cruise, Seattle, Washington

Photography and photographic tours appear to appeal to a broad cross-section of the general public. The market is comprised of individuals of all age groups between 18 and over 65 years of age. Income levels recorded were evenly split between average and above average income brackets. A mix of professional backgrounds is common among photographic groups, however, a higher degree of education among them is apparent as compared to other specialty markets. A readership survey conducted in August, 1984 by Photo Life indicated that 30% of the readership has obtained a university degree.

The photographic market is divided fairly evenly between Canada and the United States. Penetration into the European market is not significant. The location of an association or a tour operation will dictate the scope of member or client origin, i.e., primarily Canadian or American, depending on the location of the base operation.

Photographers, overall, tend to travel extensively. Results of the Photo Life survey indicate that 87% of their sample (1200) have travelled in the past twelve months. Photographers appear to favour North American destinations as demonstrated in the following table.

EXHIBIT 4-6

TRAVEL DESTINATIONS: PHOTO LIFE SURVEY, 1984

Travel within home province	56%
Other Canadian	54%
United States	47%
Europe	9%
Other	9%

In terms of foreign travel, travel closer to Canada in the New England states, for example, is increasing. In order to establish trends such as this, the Photo Life survey included a question dealing with travel over the past 3 years and within the last 12 months.

EXHIBIT 4-7

**TRAVEL OUTSIDE CANADA DURING THE PAST 12 MONTH
AND 36 MONTH PERIODS: PHOTO LIFE SURVEY, 1984**

Past 12 months %	Destination	Past 36 months %
8	Florida	11
10	California	12
4	Hawaii	7
10	New England	6
14	New York State	9
26	Other U.S.	18
6	Mexico/Central America	5
3	Caribbean	5
6	United Kingdom	4
1	Scandinavia	1
8	Other Europe	7

Market Potential

Two views on the potential for the photographic safari market have been expressed by those individuals we contacted. Some feel the market may be declining somewhat due primarily to economic factors. Decreasing sales of photographic equipment and increasing difficulty in selling photographic tours (according to a few wholesalers contacted) reflect a diminishing amount of disposable income. The number of members registered at both the National Association for Photographic Art and its American counterpart, the Photographic Society of America, has decreased slightly during the last year following a period of modest growth. This decrease has been attributed to the high costs of maintaining photographic activities as a hobby. On the other hand, all contacts stated that interest in photography is strong if not growing.

Interest in photography can be measured through participation in photo contests, rising photo finishing sales, increasing subscriptions to and general sales of photo magazines and the increasing number of calls to photographic associations (e.g., the National Association for Photographic Art) for general information.

X Photo Life holds one major competition annually and succeeds in attracting the submission of over 10 000 images. Maclean's recent competition (winning photos displayed in a September 1984 issue) included over 9 000 entries.

According to the editor of Photo Life, and based on the survey carried out by the magazine, purchases of camera equipment are decreasing. However, the fact that photo finishing sales are increasing is a more accurate indication that popular interest is indeed growing.

Numbers of subscriptions and general sales of photo magazines are a further indication of rising interest in photography. Camera Canada, the magazine published by the National Association of Photographic Art has, over its 2½ year history, increased in sales from 250 to 650, a 160% increase. Photo Life, which has a much larger audience, has experienced a 27% increase in sales and subscriptions over the last 10 year period, from 55 000 to 70 000.

It appears that the photographic market can be reached through these specialty magazines. According to the results of the Photo Life survey, 49% of the magazine's audience purchases various issues to examine the advertising within. Based on a readership of 70 000, it has been estimated that over 500 000 purchase recommendations are made by these photography enthusiasts to their "non-enthusiastic" friends. Magazine content has the potential to greatly influence those who read it. Magazine articles or advertisements could be considered the most effective way of reaching the market in terms of promoting tours to the Keewatin.

→ Certainly for tours of several kinds but I doubt there would be much impact for photo tours only!
To summarize, although there is a feeling that economic conditions are constraining the actual growth of the market as reflected in intense consumerism, the potential for growth is extremely high as based on the level of interest expressed through various other indicators.

Tours

With the exception of one American firm contacted, wholesalers have been offering photographic tours for a short period of time, usually about two years. It is therefore difficult to estimate the degree of success and potential growth in the supply of these tours. Those wholesalers who have offered trips express satisfaction with the response and state that although no great increase in

what is cost of average photographic tour

demand is expected, the market appears strong and stable. One wholesaler mentioned that natural history tours, although not advertised as photographic excursions, are in fact popular vehicles for photographers to work in new locations or with new material. Another operator suggested that beginners or true amateurs should be a target for specialized photographic tours since dedicated photographers tend to want to travel on their own.

Existing tours normally accommodate only a small number of photographers per excursion. Another common trend is the presence of a resource person who is usually a well known photographer/teacher such as Robert Taylor or Courtney Milne. According to the editor of Photo Life, experts such as these basically have their own following and can fairly easily attract parties or individuals to organized photographic tours.

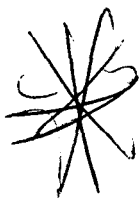
offer the pub - all expense paid to bring a group with this

Photo-Synthesis Inc. is operated by Courtney Milne. Photo tours include destinations such as the Bahamas, Ecuador/the Galapagos Islands, Australia, New Zealand, Alaska and six locations within Canada including Churchill. Many of these tours are administered by other tour wholesalers or individuals such as Great Expeditions, Sharron Filstein or Robert Taylor. In these cases, someone like Courtney Milne becomes the resource person whose name is used in the marketing of the tours.

Contacts

Great Expeditions and Ecosummer Canada offer natural history, adventure and photography excursions to small groups of people to Australia, Ecuador and the Galapagos Islands and New Zealand (Great Expeditions) and several British Columbia destinations (Ecosummer Canada). Both of these operators are interested in offering tours to the Keewatin (Great Expeditions will be offering an adventure trip to the Baffin and Ellesmere Islands in 1985) but neither felt the focus would be photography. Adventure tours for kayak enthusiasts, for example, appeared to them to be more feasible.

Follow-up



Thru-The-Lens Tours, Victor Emanuel Nature Tours and Alaska Photo Tours are three American wholesalers that were contacted for information on the photographic safari market. Thru-The-Lens Tours is the only operator contacted that has been in operation for over 20 years. Small groups of amateur photographers have been led by experts to several parts of the world. In 1984, a tour was first led to the Churchill area of Hudson's Bay. The trip will be repeated in 1985. A high Arctic trip will also be initiated in 1985 and will concentrate on the Baffin area.

THIS IS THE KIND OF INFO WE TO NEED FOLLOW-UP

X

Victor Emanuel Nature Tours are primarily birdwatching/wildlife viewing tours. Four tours a year are conducted to Churchill, two to view and photograph polar bears and two to do some birdwatching. A new tour to Churchill, scheduled for June 1985, will be billed as a photographic safari with expert Robert Taylor as the resource person.

The Alaska Photo Cruise will operate for the first time in August 1985 in conjunction with Sundance Cruise of Vancouver. A private entrepreneur has organized this tour to coincide with the Photographic Society of America's annual conference to be held in Seattle. The resource person for this excursion into Alaska's Inside Passage will be Courtney Milne. Future plans could include taking tours to other Arctic areas.

According to a few of these contacts, the Keewatin suffers from lack of image and exposure. Some feel that it is the Keewatin's responsibility to reach out and inform prospective wholesalers. It was suggested that the Keewatin could interest photographers after an expert had been invited to the region to explore, take photographs and report the experience to a widely read photo magazine.

POTENTIAL OPPORTUNITY

The Eastern Arctic and the Churchill area appear to have begun to be penetrated by both Canadian and American markets. Tours to the Keewatin are not discounted, however, but wholesalers feel not enough is known about the region for it to be considered.

Would suggest that Keewatin is not organized enough yet to effectively deal with wholesalers

Resource Capability

SAME POINT

The Arctic in general has been termed a virtual "playground" for photographers due to the nature of the light that could never be duplicated in southern areas. Tours emphasizing certain themes such as "snow photography" could have potential in an area such as the Keewatin.

little

X

Resource persons appear to be an extremely important selling point for photographic safaris. The major problem with the Keewatin at the moment is that these resource persons, who are often used as a lure in the promotion of tours, are not familiar with the area nor are the potential tour wholesalers. The market will not be effectively reached until this obstacle is overcome.

✓

In the meantime, other areas in the Arctic, particularly Baffin Island, are the major competing areas. Churchill can be termed an intervening area. However, tours to Churchill could conceivably be extended to the Keewatin.

Conclusions

↑ WHAT AFFECT
WOULD ADDITIONAL
PRICE HAVE
ON SALEABILITY

The photographic safari market can be considered small but strong and can be expected to maintain its stability and at best grow with the improvement of general economic conditions. The market is already prone to extensive travel within North America primarily and quite willing to consider new areas.

The major obstacle now in promoting tours to the Keewatin is the area's lack of exposure and apparent lack of self-promotion or attempts at creating an image for itself. Resource people and wholesalers offering photographic tours must become familiar with the area before being in a position to consider it as a potential destination.

*
WRITERS
KEY C

4.4.5 - General Interest Package Tour/Short-Term Fly-In Markets

X a) General Interest Package Tour Market

Market Characteristics

Analysis of the general interest package tour market was somewhat difficult at the outset since the distinction between general interest package tour information and special interest tour information is not clear. The problem arose when we attempted to classify the sources of information, that is, the tour wholesalers themselves into two separate groups. We soon discovered that although a wholesaler may offer an adventure tour, for example, this wholesaler may in fact also offer general interest packages. In order to avoid confusion and overlap with other sections, **we will concentrate on extracting information from our discussions with general interest package tour wholesalers who currently offer trips to the Keewatin.** These include:

- o Great Canadian Travel Company Ltd., Winnipeg
- o Horizon Tours, Toronto
- o North American Nature Expeditions, Inc., Birmingham, Alabama
- o Via Rail, Winnipeg

Three additional wholesalers who offer trips to the Churchill area were also contacted. Churchill is the Keewatin's major intervening area and appears to be attracting a growing number of tourists on general interest commercial packages. We feel it is important to include a sample of these in our analysis of the general interest package tour market:

- o Dan Dipert Travel, Arlington, Texas
- o American Tours, Inc., Minneapolis, Minnesota
- o Pacific Western Airlines Ltd., Calgary

A general interest tour to the Keewatin is normally considered an introduction into a new area and a different way of life. Sightseeing, photography, visiting art centres are the usual activities undertaken while on these tours. The general interest package concept appeals to the seniors and retired market because a taste of an "exotic" area can be acquired without the strenuous outdoor adventure-related activities required on other tours.

X A mix of professional backgrounds can be encountered in a general interest tour group but the trend is toward professional people such as teachers and doctors. Income brackets, accordingly, are average to above average.

Visitor origin is difficult to pinpoint and appears to be wholesaler-dependent: Horizon Tours has a clientele for the Keewatin tour which originates almost exclusively in Southern Ontario; Via, the Great Canadian Travel Company and North American Travel Expeditions, on the other hand, target U.S. markets primarily. **The strongest market area for general interest tours is the United States.**

Although the Great Canadian Travel Company offers what is considered a general interest tour, its fairly uncommon travel package attracts a market with a different profile than described above. These travellers are young professionals with above average income who are attracted to the concept of an unescorted, write-your-own travel itinerary (Arctic Travel Pass) general interest tour. Response is good and the market is expected to remain stable or grow. This wholesaler and its market are clearly an exception to the average general interest tour.

confirms my 250 mile radius theory

ASSESSMENT OF NUMBER GENERATED FROM EACH COMPANY - ALSO HOW DO THEY MARKET IE market mix

Market Potential

The market for general interest tours in the Keewatin is not growing and may be declining. This poor showing has been attributed to two factors:

1. Travelling into the Keewatin involves high costs that must be borne by the tourist in purchasing a tour package. The market appears to be increasingly reluctant to incur these high costs for short excursions.
2. The Keewatin tourist product is not perceived to be special or polished enough thus making the selling of the tour package difficult. Further to this, the Keewatin does not have an image that can be easily conveyed to potential tourists.

X The market may also be declining due to overall travel trends indicating a demand for more specialized tours offering value for money expended.

Reaction to the poor/market potential for general interest package tours is diverse. One wholesaler contacted is planning to cut back the number of trips to the region. However, plans for the indefinite future include extending the existing travel itinerary into additional communities. Another wholesaler has already expanded this tour package for the 1985 travel season.

North American Nature Expeditions offered its first tour to the Keewatin in 1984 and therefore could not project the success of its tour. Since response was favourable, the trips will be offered again in 1985.

Clearly, wholesalers currently offering general interest package tours to the Keewatin are at a cross-roads in terms of dealing with a changing market. General interest tours to the Keewatin may possibly decline in number or become more elaborate in their itineraries or more specialized in their activities.

Although the Keewatin does not appear to be increasing its share of the general interest package tour market, the Churchill area is successfully penetrating this market. Next year's travel season should be a record year in terms of tourism arrivals and receipts in Churchill.

again they need more work

Some wholesalers which have been successfully lured to the area by promotional efforts such as familiarization trips include Dan Dipert Travel of Arlington, Texas; American Tours, Inc. of Minneapolis, Minnesota; and Pacific Western Airlines Ltd. of Calgary. These wholesalers will, as of 1985, offer general interest tours to Churchill.

The characteristics of the market these wholesalers cater to resemble closely those described for wholesalers offering tours in the Keewatin: tourists are generally elderly, wealthy, and primarily from the United States. However, it was felt potential exists for expansion into younger markets especially the international and the incentive travel markets.

little mention so far of incentive travel

Special interest tour wholesalers have also been attracted to the Churchill area. These tours centre on viewing and photographing birds, polar bears and flora of the tundra. The Manitoba Museum of Man and Nature, Victor Emanuel Nature Tours, North America Nature Expeditions and Thru-the-Lens Tours are examples of institutions or wholesalers currently visiting Churchill.

Most of the wholesalers visiting or planning to visit the Churchill area have expressed interest in extending their tours into the Keewatin. If this market could be tapped through intensive promotion, then the potential for growth of the general interest package tour market for the Keewatin would surely increase.

IS INTENSIVE PROMOTION REQUIRED OR DO WE JUST NEED TO MAKE CONTACT & OFFER A GOOD PRODUCT FOR A FAIR PRICE & THEN LET THE WHOLESAKER SELL (HE IS THE EXPERT FOR HIS CLIENTS) - WE SHOULD BECOME MORE

Tours

This section will provide more in-depth information on the current general interest tours offered to the Keewatin as well as the future plans of the wholesalers that provide these tours.

X Horizon Tours took four groups of about 35 tourists to the Keewatin in 1984 on their Hudson's Bay and Keewatin package. Each trip was eight days long and followed this itinerary: to Churchill by train, then to Eskimo Point, Rankin Inlet, Baker Lake and Repulse Bay by special charter. Two nights were spent in Rankin Inlet on each trip. Side trips were then taken to the other communities on the agenda. Interest in this tour has declined in past years for reasons described in a previous section. Future plans relate primarily to the expansion of the existing

MORE INFO ON ACTIVITY (COMPASS) BEING IMPORTANT FOR THE TOUR

X package to include relatively comprehensive circular tour of Hudson's Bay which has been termed a sort of flying safari. The planned 1985 itinerary will begin in Toronto. A flight to Timmins will be boarded which will be followed by a train ride to Moosonee aboard the Polar Bear Express. A charter plane will then be boarded for Eskimo Point (where hunting lifestyle of the community will be highlighted) then to Rankin Inlet. The group will be based in Rankin Inlet for three nights and will take day trips to Baker Lake (where Inuit art will be highlighted) and Repulse Bay (whaling history). The group will then cross the Bay and reach the Belshire Islands to experience the Quebec Inuit lifestyle. A tour of the James Bay LG2 hydro-electric project will follow (two nights accommodation) and conclude the tour. Return flight to Toronto will be via Timmins.

Cost?

Although Via Rail is considering cutting back its current number of tours to the Keewatin, Via is also planning to expand the tour to include more communities. The Hudson Bay Explorer and Great White Bear Explorer Tours presently offer one day fly-ins to Eskimo Point. Future plans are not as definite as those of Horizon Tours but it is hoped that trips to Rankin Inlet and Baker Lake may be added to the tours. The high costs involved in such a change and the possible impact on clientele are the primary restraining factors to expansion of this sort.

Cost?

North American Nature Expeditions offer an "Arctic Encounters" tour package. Destinations include Winnipeg, Churchill, Rankin Inlet, Yellowknife, Cameron Falls and Great Slave Lake. This wholesaler is fairly optimistic of its Arctic tour and hopes to increase the number of trips offered to the region.

Very small numbers

The Great Canadian Travel Company has a rather unique approach to marketing tours to the Arctic. The package that currently includes destinations in the Keewatin is the 14 day "Arctic Pass Tour". Tourists literally write their own travel itinerary based on documentation provided by the wholesaler. Rankin Inlet is the usual Keewatin destination chosen. This tour will continue to be offered but efforts are now concentrated on developing more tours to Greenland. Over 300 clients are expected to take these tours in 1985. The Company is also in the process of developing a tour that will include Greenland, Iceland and Northern Scotland.

How many actually did in previous years

Resource Capability

Should
THE SEISS
THIS SITUATION
ARE AWARE OF
potential
factory could

The most important resource characteristic the Keewatin region has in terms of impressing the general interest tour market is its population. According to one wholesaler, visitors on his packaged tours always have "high emotional responses regarding contact with the Inuit culture". The Arctic way of life that can be experienced in the Keewatin is one of the region's major tourist assets.

A few resource problems were mentioned by the wholesalers we surveyed. One that cannot be remedied but can be frustrating or even detrimental to tourism relates to fog. One wholesaler mentioned fog was the cause of the cancellation of a familiarization trip to Rankin Inlet. Because of this personal experience, the proposed 1985 tour to Churchill was not extended to the Keewatin.

The tourism plant does not appear to be sufficiently developed for some wholesalers to consider taking a group to the Keewatin. Others feel services and accommodations are overpriced and consequently that costs are too high for their markets.

Why?
cultural
tour
before

What should it be?

Finally, the Keewatin does not have a salable image. This makes the region difficult to sell. (Furthermore, some wholesalers are reluctant to promote a region in a fashion normally reserved for regional public and/or private tourism-related agencies.)

Whiter's BEST VENUE
However must have product
to write about

then
how
should they
promote it?

Areas competing for the share of the market include Greenland and Alaska. Greenland, in particular, has been singled out due to its attractive, natural resources and its well organized and relatively inexpensive tourism plant resources.

The Keewatin's major intervening opportunity is the Churchill area. Since tourists have already travelled a great distance to reach Churchill on their tour, potential exists to draw these tourists further north. Therefore, this intervening opportunity may be used to Keewatin's advantage given strong promotional efforts.

Conclusions

The market for general interest package tours to the Keewatin is not performing well. The Churchill area, on the other hand, appears to be penetrating the market successfully. This success may be attributed to promotional efforts on behalf of tourism officials. Given the possibility of further promotion by Keewatin representatives, potential exists to tap the Churchill general interest tour market by selling the wholesalers in question the idea of extending their tours to Keewatin communities.

Why is
doing so well
Churchill
how does price
compare.

BRILLIANT!
BUT WHAT TO
WE HAVE TO
SELL

Notwithstanding the potential for growth that exists with respect to the Churchill area, tour wholesalers currently taking trips to the Keewatin are at a turning point. Either the number of tours offered will be cut back or existing tours will be redesigned to reflect the growing demand for more specialized tours.

b) Short-Term Fly-In Market

Through our research, we have discovered that in terms of Arctic travel, the short-term fly-in market is closely related to the general interest package tour market. Most general interest tours to the Keewatin are, in fact, short-term fly-ins. Via Rail tours, for example, fly to Eskimo Point for only a day. Even Horizon Tours new Hudson's Bay Circle Tour for 1985 is composed of a sequence of short fly-ins into various communities.

A classic example of a short-term fly-in is a tour offered by Goliger's Tours Ltd. of Toronto. The entire trip takes place in a 24 hour period. Either Inuvik (for Vancouver based tourists) or Frobisher Bay (for Toronto based tourists) are the destinations for this short tour which attempts to provide tourists with a taste of the Arctic lifestyle through a meal of char and an escorted bus tour around each community.

The most apparent disadvantage of promoting short-term tours as described above relates to the fact that these tours are the least likely to provide Keewatin communities with tourism receipts. Since the market for general interest tours and short-term fly-ins is not exhibiting signs of growth, it can be concluded that there are perhaps other specialty markets more worthy of in-depth investigation or follow-up.

4.4.6 - Adventure Travel

Market Characteristics

The adventure travel market is part of a growing trend in travel for pleasure. **The Adventure travel market is characterized apart from traditional "sun-sea-sand" pleasure travel market by the common desire of its participants for experimental and/or skill-testing trips oriented to the outdoors.** In an attempt to better understand the characteristics of the adventure travel market, we consulted with the following group of adventure travel wholesalers and operators:

- o Canada North Outfitting, Inc., Waterdown, Ontario
- o Canoe Arctic Inc., Fort Smith, Northwest Territories
- o Ecosummer Canada, Vancouver, British Columbia
- o Equinox Adventures, Beamsville, Ontario
- o Goway Tours, Toronto, Ontario
- o The Great Canadian Travel Company Ltd., Winnipeg, Manitoba
- o High Arctic International Explorer Services, Inc., Resolute Bay, Northwest Territories
- o North American Nature Expeditions (a Division of International Expeditions, Inc.), Birmingham, Alabama
- o Owl Whitewater Leaders, North York, Ontario
- o Special Interestours, Medina, Washington
- o Tuulik Wilderness Adventures, Ottawa, Ontario and Frobisher Bay, Northwest Territories
- o Wilderness Tours, Ottawa, Ontario

*check into the
companies performance.
we don't know if
a single group these
people have
brought*


As mentioned above, the typical adventure travel client is seeking a travel experience which permits him or her the opportunity for exploration and familiarization with the physical and culture setting of the travel destination. In addition, many adventure travel clients are seeking physically strenuous experiences which develop and test skills in activities such as canoeing, kayaking, bicycling, sailing, hiking, skiing, rafting and trekking.

The adventure travel market is not restricted to any age group. Participants range in age from the teenage years up into the 50's, 60's and even the 70's.

The adventure travel client is also represented by a wide range of professional backgrounds ranging from blue collar to white collar, managerial and professional occupations. These people share common characteristics of good health, high energy levels and generally inquisitive personalities. Income levels range from average to above average.

Shorter adventure travel packages to destinations within one day's travel distance (i.e., 1 or 2 day whitewater rafting trips; 1 or 2 day skiing, cycling or hiking excursions) are undertaken by the full spectrum of the adventure travel client market. Longer trips to more inaccessible destinations are more frequently taken by individuals, couples and families of average to above average income, possessing post-secondary school education and generally employed in white collar, managerial or professional occupations.

Adventure travel clients are not concerned about deluxe accommodation. Given the nature of the activities they are undertaking, participants are willing to put up with some lack of comfort and physical hardships. Accommodation is generally "mobile" (i.e., tents). Cooking meals often involves all participants.

Our discussions with adventure travel wholesalers indicated that a definite percentage (ranging from 20 to 50 percent) of the current volume of their business is repeat business. It is not uncommon for customers who take a one or two day adventure trip one year to return to the same company to participate in a more extensive trip in subsequent years. Almost without exception, wholesalers further promote repeat business through personalized mailings and suggested trips to different locations. 

Market Potential

Our discussions with adventure travel wholesalers and operators indicated that there is increasing demand for experiential travel experiences.

The 1982 Canadian Travel Survey indicated that over 10 million person-trips related to outdoor activities, including cross-country and downhill skiing, were undertaken by Canadian Travellers in Canada. This represents about 10 percent of the total number of person-trips taken by domestic travellers in 1982.

X
In the United States, a 1983 Gallup Organization, Inc. poll of American household participation in leisure activities indicated that about 56 million persons and 68 percent of all American households had participated in at least one outdoor activity such as bicycling, camping, hiking, downhill skiing ^{or} ~~and~~ cross-country skiing.

A recent market survey commissioned by Esquire Magazine¹⁾ of young urban professionals²⁾ across the United States indicated that fully 30.5 percent have already had an outdoor/experiential vacation. Since the young urban professional represents the "core" of the adventure travel market, it may be possible to get a rough **approximation** of the size of this market component.

X
The characteristics of this market segment are virtually the same for Canada and the United States. As a result, we can look at one major potential market origin~~s~~ - Metropolitan Toronto - to provide an **estimate**^{of} the order of magnitude size of this specialized market in a major North American city.

Toronto, Ontario has a population of 2 998 945⁽³⁾ in the Census Metropolitan Area (C.M.A.) In the Metropolitan Toronto C.M.A. there are approximately 670 000 men and women between the ages of 30 and 44⁽⁴⁾. If one assumes that 25% of these have university educations⁽⁵⁾ and professional/managerial jobs (most people in this category - both men and women - work). This prime target market of urban professionals and managers is approximately 167 500 - 5.6 percent of the total census population of Metropolitan Toronto. Further assuming 30.5 percent of estimated by Esquire Magazine, this represents 51 088 persons in the 30-44 year age range who have had or would want to have an outdoor or experiential vacation.

How many of these would go to the destination?!

- 1) Travel Market Survey of the New Success Crowd (The Young Professional) conducted by Beta Research Corp., November 1983.
- 2) The "new success crowd" is defined as:
 - o having gone beyond secondary school
 - o holding a professional/managerial position
 - o between the ages of 30 and 40
 - o having a household income of at least \$40 000
- 3) Statistics Canada - Catalogue 93-918 (Volume 2), Table 6. *yes?*
- 4) 1981 Census of Canada
- 5) Ibid
- 6) According to the 1981 Census, 21% of the entire Toronto population over 15 has a university education (not including technical colleges and other non-university post-secondary education).

Possible sources of potential customers for adventure travel include recreation associations, squash clubs and single clubs. Naturalist clubs provide a potential market for adventure travel primarily related to wildlife viewing, photography, hiking and canoeing.

Existing adventure travel wholesalers and operators are an excellent way to access the current adventure travel market. Wholesalers and operators are aware of current market trends and are in a position to influence the chosen destination of repeat customers who are seeking longer trips to unique and exotic locations. The operators and wholesalers we contacted, who currently offer trips to the Keewatin or similar Arctic destinations, indicated strong interest in co-operating with local outfitters and government officials to undertake adventure travel trips into the Keewatin. But before such trips can be organized, wholesalers want to be personally acquainted with the region and the outfitters currently in operation. It appeared to be a general opinion that in order for such co-operation to take place, operators, government officials, and transportation carriers must offer specialized familiarization trips directed toward specific adventure travel (i.e., canoeing, kayaking, naturalist activities, etc.). The example of the Greenland Tourist Board which currently offers to arrange transportation and accommodation for wholesalers and operators to visit Greenland and the efforts of the Zimbabwe tourism department to arrange, organize and defray the cost of operator/wholesaler familiarization trips were two examples offered pertaining to promotional activities to entice market generators to other destinations.

What does
Parasite
have to
do with
outfitters

Also on
in N.W.T.
✓

Bar
for
one
year

Current Offerings in Adventure Travel

An immense variety of travel adventure opportunities to virtually every corner of the world is available to the adventure travel market. A sampling of these are briefly discussed below to give an indication of the scope and extent of adventure travel opportunities.

A variety of adventure travel opportunities to Canada's Arctic are currently available. For example, Canada North Outfitting, Inc. offers a variety of escorted adventure tours in the eastern Arctic including snowmobile safaris, kayaking, dog sled trips, cross-country skiing and wildlife safaris.

X High Arctic International Explorer Services Ltd., apart from operating their main base naturalist lodge, specialize in 10-day snowmobile/sledge expeditions. These expeditions include wildlife and scenery sightseeing activities, camping, visiting historic sites of past Northwest Passage expeditions and ancient Inuit and Thule sites, learning about Arctic survival skills from Inuit guides and fishing for Arctic Char.

X Canoe Arctic, out of Fort Smith, Northwest Territories, provides escorted canoe trips down rivers such as the Thelon and the Coppermine. Principal activities of these trips center around wilderness camping and travel, wildlife viewing and photography, and sport fishing. These can be further personalized to cover special client interests in wildlife photography, whitewater canoeing, fishing, historical routes, bird watching, botany and geology.

X Special Interestours offers several specific adventure travel trips including trips to view floe edge wildlife and Arctic marine mammals. These tours are escorted by knowledgeable scientific experts in addition to Inuit guides. Travel is by snowmobiling and accommodation while on the land is in tent or igloo, depending on the season and weather conditions. Special Interestours also offers dog sled trips and wilderness canoe adventures in northern British Columbia and Greenland. Additional offerings, apart from the Arctic expeditions, include trips to the Southern Pacific including Fiji, West Samoa, the Cook Islands, Tonga, New Zealand and Australia.

X International Expeditions Inc. offers adventure and educational travel to over twenty international destinations. Its North American division, North American Nature Expeditions, offers an "Arctic Encounter" trip which originates in Churchill, Manitoba and then travels to Rankin Inlet and Yellowknife in the Northwest Territories. Other North American expeditions include: naturalist adventure trips to the Florida Everglades; the Andros Islands off the coast of Florida; Texas; Baja; California (Mexico); and Western Mexico. South American offerings include: river expeditions along tributaries of the Amazon River in Peru; whitewater rafting in Costa Rica, archaeological trips in Peru and Belize; and naturalist trips to Costa Rica and the Galapagos Islands. Other international expeditions take travellers to China, New Zealand, Australia and Kenya in Africa. The American National Audubon Society and the Zoo and Aquarium Travel Association (ZATA) currently undertake their official international travel through International Expeditions Inc.

Goway Travel is one of the most experienced adventure travel wholesalers, having been in operation for the past twenty years. The company specializes in transcontinental overland (motor coach) expeditions across Asia and Europe.

X Trips average between 26 to 80 days and additional trips/routes go through Nepal and India, Egypt and the Holy Land, the U.S.S.R. and Scandanavia. North American trips include: a four week mini-bus and cruise trip from Vancouver into the Yukon and Alaska and returning by sea to Vancouver along the Inside Passage; one week canoeing trips in Algonquin Park; and two week camping trips in the Rocky Mountains in Alberta. Goway's South American trip is a 70-day motor coach tour from Rio de Janiero, Brazil to Quito, Ecuador, with side trips down the Rio Napo (a tributary of the Amazon River), Cuzco, Peru and the Inca Trail and the Galapagos Islands. All trips are fully escotred and emphasis is placed on budget travel. Motor coaches are self-contained in terms of cooking facilities and accommodation is in the form of tents in rural areas and modest (budget) hotels in the cities.

Ecosummer Canada, a travel wholesaler which emphasizes its programs in ocean kayaking, nature photography, alpine treks, river expeditions and mountaineering, operates primarily out of British Columbia. Other adventure trips which are currently offered include canoeing in the Yukon and the Baffin Region of the Northwest Territories. **The company is actively investigating a future kayaking trip to Wager Bay** and a rafting trip down the Zambize River in Zimbabwe, Africa.

Resource Capability and Competing Opportunities

X The ~~District~~ ^{Region} of Keewatin offers a wealth of resources suited for the adventure travel market. Its remote location provides a sense of mystery and exotica which appeals to a market seeking "once in a lifetime" experiences and unusual destinations. The rich and abundant marine and land wildlife provides outstanding opportunities for wildlife viewing and photography. The many pristine lakes and rivers provide unparalleled opportunities to combine the above activities with canoeing, kayaking and rafting.

With regard to competing destinations, virtually every part of the world beckons the adventure travel market. As noted above, a variety of trips are offered to locations in Africa, South America, Asia, Europe, China, the South Seas and

North America. In addition, many of these destinations enjoy general public recognition and awareness as the result of books, news articles, articles in publications such as National Geographic and in particular from television documentaries and news reports.

Conclusions

X The adventure travel market is growing and the ~~District of Keewatin~~^{Region} has the physical and natural resources to support a variety of adventure travel experiences.

It must be recognized that there is tremendous competition for the participants in this market and consumer demands for a quality experience are high. Great care must be taken to produce truly distinctive adventure travel offerings which are competitive with available offerings. *Such as?*

— (Co-operative undertakings with key existing adventure travel wholesalers would allow direct access to the adventure travel market and would foster promotion of the Keewatin as an adventure travel destination.

4.4.7 - Arts/Cultural/Historic Tour Market

Market Characteristics

The arts/cultural/historic market is difficult to define in terms of its characteristics since very little published information exists on the matter. Through our conversations with several curators and special interest groups however, we were able to identify the general characteristics of the arts/cultural/historic market for the Keewatin Region.

Groups and individuals contacted include:

- o Arts and Culture in the North, New York.
- o The Association for Native Development of the Performing and Visual Arts, Toronto
- X o Burdette Wildlife Gallery, Orton (near Orangeville) Ontario
- o Canadian Arctic Producers, Ottawa
- o Dayton Museum of Natural History, Dayton, Ohio

- o Erie Art Museum, Erie, Pennsylvania
- o Federation des Cooperatives du Nouveau Quebec, Montreal and Toronto - (Arctic Showcase Outlet)
- o Indian and Northern Affairs Canada, Hull
- o Inuit Art Enthusiasts, Edmonton
- o Barbara Lipton, Guest Curator of the Arctic Vision Exhibition, South Orange, New Jersey
- o Manitoba Museum of Man and Nature, Winnipeg
- o National Museums of Canada, Ottawa
- o National Museum of Man, Ottawa

The market appears to be limited but committed to the promotion and appreciation of Arctic art and culture. Two special interest groups contacted publish newsletters to relatively small groups of individuals: Inuit Art Enthusiasts, for example, currently have 110 subscribers. An American group called Arts and Culture in the North, based in New York City also has a small, albeit stable core of subscribers. This organization can boast, on the other hand of a 5 000 international mailing list.

Members of groups such as these and various other unaffiliated art collectors are generally represented by all adult age groups, tend to be white collar workers and usually have above average income.

The general public which is attracted to exhibitions of Inuit Art tends to encompass a larger mix of professional backgrounds and a lower average income.

Over the past fifteen years the general public of Canada has been increasingly exposed to the Inuit art being produced in the Canadian Arctic. Extensive collections are displayed at the National Museum of Man in Ottawa and the Winnipeg Art Gallery among others. The Museum of Man contains over 5 000 pieces of Inuit Art whereas the Winnipeg Art Gallery holds the largest Inuit sculpture exhibit in Canada.

Over 75% of the exhibits at the Museum of Man deal with native history, therefore attendance figures to the Museum can be used to gage general interest in native history and art. Attendance at the Museum has been fairly stable since 1979, with the exception of a 4% decline over the past two years. This decline,

Research

however, has been attributed more to the 7% decrease in the number of tourists visiting Ottawa overall than to decreasing interest in the Museum's subject matter.

According to an official at Indian and Northern Affairs Canada, Canadians overall are considered to be generally aware of Inuit culture and way of life. The trend, therefore, in Canadian art galleries and in some museums is to feature a specific artist as opposed to several artists from various communities.

The general public in the United States on the other hand is not considered to be as aware of Inuit art and culture as in Canada. Two exhibits are currently touring the U.S. "Arctic Vision" is sponsored by Canadian Arctic Producers, a marketing agency representing Arctic Co-operatives Limited of Yellowknife and Indian and Northern Affairs Canada. "Contemporary Inuit and Indian Art of Canada" is sponsored by Indian and Northern Affairs Canada and is currently touring the American southwest.

Before reaching Los Angeles, the "Contemporary" exhibit was displayed in the lobby at the United Nations, at the Organization of American States in Washington D.C., in Dallas, Texas, in Santa Fe, New Mexico in an American Indian Art School. The "Contemporary" exhibit has received wide coverage and good response from a generally uninitiated audience.

The "Arctic Vision" exhibit has been in three communities to date: at the Dayton Museum of Natural History where 15 000 visitors viewed the exhibit and at the Erie Art Museum and the Robertson Center for the Arts and Sciences in Binghamton, New York where approximately 3 000 people at each museum attended the showing.

The market appears to be divided into two groups: one, smaller, comprising of serious art collectors and the other, somewhat larger, containing a broader mix of individuals interested in Inuit art culture and history.

→ This is hardly grounds for such a optimistic
tour! Cost alone would deter anyone, let alone
the distance to travel to experience culture.
Add this to other tour ideas as a package and you
have a better overall experience.

Market Potential

It is difficult to separate the culture, the art and the history of the Keewatin into three distinct attractions. Generally, since the art, culture and history of the Arctic are inextricably linked most persons interested in one of these subject areas are naturally interested in the others.

X In terms of the potential growth in interest in Arctic ^{Arctic} Art and culture, it has been suggested by art specialists that Inuit art is not considered a fad like American Indian art was a few years ago (turquoise jewellery, etc.). Although the memberships of special interest/collector groups are quite small, they are either growing slightly or are stable and members have had a long term interest in the art. These groups are composed of serious Inuit art enthusiasts or collectors who are, on average, in an upper income bracket. The implication of this is that this strong but limited market segment represents a core of potential visitors to the Keewatin with "buying-power".

The Canadian Arctic Producers (CAP) which distribute Inuit Art in the market place suffered a slump in sales in 1982 but have picked up over the past two years. According to a CAP official, the group averages about \$15 000 000 in sales annually. The Federation des Cooperatives du Nouveau Quebec's Ontario outlet in Toronto has only been in operation for the past 3 years but has recorded a 35% increase in sales between 1983 and 1984.

The general public's interest appears to be media dependent. Curators at the museums where Arctic Vision has been displayed feel **the success of the exhibit was due in part to the amount of energy and funds devoted to publicity and promotion.** The exhibit was well received and although the art was appreciated, a real interest was expressed in the culture of the people of the North. Asked whether these visitors expressed an interest in actually touring the Arctic to experience the art and culture at the source, curators felt the interest was either not that high or they responded that this issue had not been gaged.

Tours

Many wholesalers offer general interest tours that focus somewhat on the Inuit way of life as an added attraction to their packages. Few wholesalers however offer specialized art/culture/history tours.

Qaiivik Limited, for example offers a seven day "Arctic Spring Experience" package from Yellowknife to Holman Island. The tour features a four day trip on the land and stresses experiencing Inuit family life, the fauna and flora of the high Arctic, and local art as well as learning about local history. Special Interest Tours of Medina, Washington provide an introductory twelve day tour into the culture, the art, vegetation and wildlife. The "Discover the Worlds of the High Arctic" jumps from Yellowknife to Baffin and Ellesmere Island communities. Canadian Nature Tours, co-sponsored by the Canadian Nature Federation and the Federation of Ontario Naturalists offer some tours to Cape Dorset and Broughton Island that focus on the art and particularly the culture of the people of the Arctic.

Canada North Outfitting Inc. seems to be the only wholesaler having offered a specialized art tour in the Arctic but had difficulty interesting clients with its own promotional techniques including magazine articles and advertisements. A well known Inuit art specialist of the group "Arts and Culture in the North" was contacted and asked to join the wholesaler in promoting the tour, this time with success. According to the specialist, official tour companies need to affiliate with well known experts in the art field before attempting to lure art enthusiasts.

From a relatively small market base, therefore, a sufficient number (12) of tourists were interested in joining the tour to Baffin Island communities. On another occasion, in 1979, a tour to Rankin Inlet and Baker Lake was organized by the "Arts & Culture in the North" group following its Inuit art-related conference held in Winnipeg. Tours to various areas are often organized after these conferences which are held in various cities in Canada or the U.S. at approximately every 18 months.

The implication then is that the potential market for tours into the Keewatin lies within specialized art/educational groups such as the Inuit Art Enthusiasts and Art & Culture in the North. Both these groups have expressed the interest in promoting Keewatin Art tours in their newsletters should the Keewatin choose to do so. The advantage is that the newsletters would reach an international audience of potential tourists.

In terms of future growth of this specialized market, a slight increase is expected within North America. **The real potential however lies in capturing the international market which has not as yet been successfully tapped.** Canadian

Art Producers, the Federation des Cooperatives du Nouveau Quebec and Indian and Northern Affairs Canada are attempting to penetrate international market areas either through exhibits shown in international agencies such as the United Nations and the Organization of American States, through the intermediary of Canadian Embassies overseas or through direct showings such as one recently sponsored by the Canadian Trade Centre in Japan.

Resource Capability

In terms of the Keewatin supporting the cultural/art/history/market, consensus appears to be among specialized art groups that the Keewatin has potential as a "cultural" destination especially in the communities of Eskimo Point and Baker Lake. However, Baffin Island is considered a major competing opportunity since this area is the most developed in the Canadian Arctic. Holman Island has also been discussed as an undeveloped area but potentially interesting for an art/culture oriented group.

Regarding the Keewatin, it has been stressed that only small groups of tourists would be appropriate given the nature of fairly isolated communities. Most important though is the affiliation with a knowledgeable member of the community who could act as a tour's major contact and source of information.

Also important for specialized interest groups is the availability of art for purchase since obtaining an artwork often can be one of a tourist's major objective.

Although art and culture appear to be the focus of these specialized groups, interest has been expressed in including other activities while on the tour such as hiking, viewing wildlife and wildflowers. Touring historic sites in Whale Cove, for example, could possibly be the logical extension to a cultural/art tour.

Conclusions

The art/cultural/historic tour market appears to be comprised primarily of a small specialized core of collectors and enthusiasts. The general public is not disinterested but does not appear to be committed to the art, culture and history of the Arctic to the extent of considering cultural tours to the area. Although

is there a price break for buying local to be used as incentive ie less price

*X
X*

the "committed" market is small it is considered strong and qualified as possessing a relatively high "buying power" in terms of affording a tour to the Arctic and purchasing Inuit artwork at the source.

Correct!

Promoting art/cultural/historic tours to the Keewatin does not appear to be a "money making proposition" at the outset since the market base from which to draw from is so narrow. However, such tours could possibly generate valuable spin-offs in the sense of stimulating art production since artists could potentially sell their art and converse directly with those tourists genuinely interested in it.

4.5 Overall Market Implications

- o All market groups we surveyed stated the Keewatin lacked a salable image. *So suggest one!*
The absence of such an image is considered a major stumbling block in trying to interest potential target markets. Some tour wholesalers or operators we contacted, for example, were not aware of the geographical position of the Keewatin within the world, let alone the assets of the region. *THIS WOULD SEEM TO BE AT THE CORE OF THE NEXT TRADE CENTRE AS*
- o Each specialty market we studied has unique characteristics. In particular, each market can be most effectively reached through specific media. For example, the photographic market may be reached through photography magazine articles and advertisements; the cultural/arts market may be reached through art group newsletters; and the adventure market can best be reached through tour wholesalers. This information could be useful in the planning of a specific marketing strategy. *NOT surprising*
- o According to overall travel trends, tourists tend to prefer specialized holiday experiences which provide them with value for money spent. For this reason, in part, the only market which does not appear to be performing well in the Keewatin is the general interest tour market. Fishing is the Region's current strongest market. Other markets such as photographic, art, remote naturalist lodges and adventure markets could potentially provide the Keewatin with small but fairly stable sources of tourists. *≡!*

While this is true, what is the point of promotion photo safaris in photographic magazines when number of potential photographers interested in area or considered?

- o Our research has indicated that there are two overall visitor markets in the Keewatin: one composed of primarily American tourists and another, more substantial composed of Canadians on business. Although this study has concentrated in identifying specialty target markets most appropriate for the Keewatin, some effort could be expended in tapping the large business market and promoting the concept of extending business trips into holidays in the Region.

*little info
for such a
large market segment*

4.6 Market/Resource Association Matrix



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5.0 Recommendations

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