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**Indentification Of Potential Tour Packages From
Moosonee, Ontario To Sanikiluak, N.w.t.**

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Identification of Potential Tour Packages
From Moosonee, Ontario to Sanikiluaq, N.W.T.

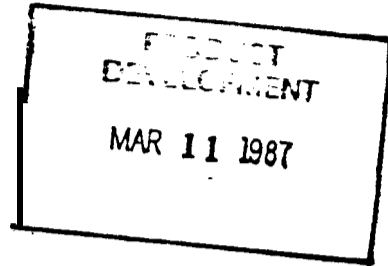
Final Report

March 1987

Laventhol & Horwath
Management Consultants

March 5, 1987

Mr. Charlie Crow
Chairman
Economic Development Committee
Municipality of Sanikiluaq
Sanikiluaq, N.W.T.
XOA OWO



Dear Charlie:

We are pleased to present our final report on the "Identification of Potential tour Packages from Moosonee, Ontario to Sanikiluaq, NWT."

This report incorporates the background resource and market analysis presented in the preliminary report of September, 1986. In addition, we have revised the projected tour costs as instructed in our meetings with your committee in November and as discussed on February 3rd. Finally, we have included the results of our tour operator survey in January and the recommendations arrived at in our meeting with the Economic Development Committee and the Co-op Board of Directors on February 3, 1987.

We trust that these findings are satisfactory to you. As discussed, we cannot **guarantee** that tour companies will be in a position to bring in tour groups this coming summer.

Nonetheless, should the proposed familiarization tour take place in July or August and the recommended improvements to the motel be carried out, then we feel strongly that the community will be in a good position to benefit from tourism. We look forward to our future **contact** with yourself and the community.

Yours very truly,

LAVENTHOL & HORWATH

Per: Glenn Pincombe

Per: Joel Peters

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1.0 TOURISM POTENTIAL OF COMMUNITY RESOURCES

We have carried out the following activities to **analyse** the tourism potential of the resources found in **Sanikiluaq** and the **Belcher** Islands:

- o Visited the community in June, 1986, held discussions with a variety of community groups and individuals, and conducted a day long trip to **Katapik**;
- o Reviewed the previous report on tourism opportunities (Marshall **Macklin** Monaghan, 1982);
- o Read the three brochures on tours around the community prepared by Mary **Ippak** and Lizzie **Novalinga**. These brochures describe "A Walking Tour of **Sanikiluaq**", "A Visit to **Katapik**" and a "Tour to **Amitualuk** and **Sittapik**";
- o Compiled and reviewed secondary literature on the geography, history, **carving** and wildlife of the **Belcher** Islands. A list of the sources consulted is provided in Appendix A.

Below are our summary comments and conclusions about the tourism potential of the community's resource base. We have not attempted to present everything we have found out about the community. Rather, our intent is to summarize our professional judgments about whether the resources are competitive with other tourist areas. In the following sections, we will suggest how the resources can be packaged and presented as tour packages.



1.1 **Community** Resources

The tourism appeal of the community and its residents is considered to be of moderate to high potential. Some of the factors which contribute to this appeal are:

- o The degree of isolation from the rest of North America creates genuine **curiosity in** people who like to travel to remote parts of the world. Islands hold great appeal in this regard and the lack of information and knowledge of the **Belcher** Islands until Robert **Flaherty's** visit in 1915 reinforce this mystique.
- o Contemporary lifestyle, notably in terms of the people's continued dependence on the land, is also a marketable asset. The **Inuit** are well-regarded in Europe and to a somewhat less but still significant degree in both Canada and the United States for their **cul**ture as first peoples and their relationship with the land.
- o The special history of the **community** of **Sanikiluaq** in terms of other previous settlements at **South Camp** and the **HBC** post, and the ways in which community **services** are delivered will be of interest to many visitors. The operation of the radio station, especially for community bingo is a good example of how life in **Sanikiluaq** differs from the way of life in the South. Other examples are the diesel power system, the water trucks, the cost and delivery of community housing and the Co-op. Presentation of these attributes through the Community Walking Tour brochure, by an actual tour of community buildings, and by telling the story of



Sanikiluaq to visitors are some of the ways to develop this resource.

The story of **Sanikiluaq** will not by itself attract tourists to the community, **unlike** the factors discussed above. However, **once** individuals decide to visit **Sanikiluaq**, they will be interested in learning more about how the people live there.

- o The genuine warmth and hospitality that community residents put forward to outsiders is a very important marketable factor. Horizon Holidays found the reception which the community afforded their tour groups with residents freely coming out to meet the plane was one of the highlights of their tour package. It didn't happen when they visited other communities and left their tour participants with a **very good** impression of the community.

This warmth and friendliness might be threatened if too many tourists were to visit at one time or if the Community had tourists coming to visit each day throughout the summer. Whether this **ever happens**, it should be kept in mind that the genuine enthusiasm of those involved in receiving visitors is very important.

In summary, Sanikiluaq's appeal as **an** isolated, **Inuit** community on remote islands within Hudson Bay is considered to be the primary attraction for tourists. Other community resources can be presented to further highlight the special way of life and the recent history of the community residents, but these factors are not likely by themselves to generate tourism.



1.2 Wildlife Resources

There are several factors which **limit** the appeal of the wildlife resources found about the **Belcher** Islands to the general tourist market. Nonetheless, it is considered that there is moderate appeal to the more limited, special interest naturalist market.

Factors which limit the broad market appeal concerning wildlife are the following:

- o Access. Most of the wildlife are not found in areas close to the community but are dispersed over large areas of the islands and the adjacent waters. Viewing opportunities would require extensive travel by canoe, kayak, aluminum boat or larger vessels, facing adverse and often unpredictable conditions such as wind, waves and persistent ice.

- o Resource Significance. Tourist areas which have developed or enhanced their market appeal through wildlife viewing, do so on the basis of internationally significant wildlife species, many of which occur in large numbers and very importantly, can **be viewed** on a guaranteed basis. Examples include Kenya in East Africa, where the large game **reserves** draw thousands of visitors each year. In Canada, other examples are the bison in Wood Buffalo National Park, the Porcupine Caribou herd in Northern Yukon or the Musk Ox in the newly proposed national park on **Ellesmere** Island. The species that are commonly found in the **Belchers** such as ringed seals, **beluga** whales, walrus, reindeer or the plentiful bird species either do not occur in significant concentrations, are not sighted on a



regular basis or are not sufficiently unique to the **Belchers** (as opposed to other areas around Hudson Bay) that they constitute a national or even, regional level attraction.

Of the wildlife that are reported to occur in the **Belchers**, it is considered that avid naturalists would constitute the primary market. This would likely develop in conjunction with expanded efforts to attract more naturalists to **Moosonee** and Moose Factory. Species with appeal to this market include:

- o Nesting birds. Of 49 recorded species, 26 have been reported as nesting. The market for birding would be primarily from southern Ontario and would be centred around the opportunity to view Arctic species not commonly sighted in boreal regions.
- o Polar bear. Population is unknown and a denning area is suspected to occur in the **Belchers**. Viewing would be **occasional**. ⁷⁷⁷⁷ Hunting for polar bear requires use of a dog team in addition to other regulations and at present, there is no team being kept in the community.
- o **Beluga** whales. Occasional summer **visitors**, although not reported in literature as frequently sighted.
- o Walrus. Infrequent to rare for walrus to be found at **haulout** sites on the **Belchers** during the summer months.
- o Seals. Of the marine mammals, ringed seals and square flippers are most common. In general, seals are not exotic enough to stimulate market appeal. The population of freshwater seals reported to exist in **Kassegalik** Lake is one of only two known populations in Canada. The market appeal is however very limited.



- 0 **Sports** fish. Arctic char would be the leading species for sportsfishing. However, control of the sportsfishing has been a problem in the past and extensive marketing could lead to a repeat of these problems. The ability of the fish population to support an active fishery is considered questionable.

- o Waterfowl. Geese and ducks are common although the hunting is not considered to be significantly higher in potential than opportunities available in more accessible locations. Nonetheless, there is some potential for attracting both hunters and anglers.

- o Reindeer. **A** herd estimated in excess of 500 individuals has developed since being transported to the **Belcher** Islands in 1978. **A** controlled **harvest** is in effect with the kill distributed among the community. The dispersed nature of the herd makes **observation** infrequent, although an overflight of Wie gand Island and other areas could lead to more **common** sightings.

1.3 Scenic Resources

The scenic resources of the **Belcher** Islands are subtle and not dramatic. They are not marketable in and of themselves, based on comparisons to the geography of **Baffin** Island or to the prominent scenery of Northwestern B.C., Yukon and the Northwest Territories. What is notable however is the complete lack of trees and the rocky, archipelago landscape: the scenery of the islands reinforces their remoteness and Arctic character. In effect, the contrast to southern conditions will be useful from a marketing perspective since one is driven to enquire how and why do people live in such an apparently, forbidding place.



While subtle in character, the landscape does present several notable features which will be of interest to visitors for sightseeing purposes. These include several waterfalls, scenic lookouts and inukshuks (such as at the Bluffs), and previous settlements and/or seasonal encampments. Features such as the remains of **sod houses**, **tent rings**, stone fox traps and grave sites can be presented in **the context** of a tour of life on the land, along with explanations of why particular locations might have been occupied and how people lived in the different areas.

1.4 Special Activities

1.4.1 Carving

In recent years, soapstone taming produced by the residents of **Sanikiluaq** has become recognized as a distinctive and well-detailed product. The quality and **colour** of the stone that is available from the local quarry contributes partially to the special significance afforded to locally produced **carvings**. Aside from the typical greenish shade of some of the stone, the actual representation and occasional **humour** of the soapstone pieces has attracted some attention in the art world. Special **shows** and publications have taken place which should further enhance the growing reputation enjoyed by local carvers.

On talking to one tour organizer at Horizon Holidays, the opinion was expressed that the carving which takes place and is generally available at the local co-op **was** "not that different from soapstone carving found in other communities". Another individual expressed his appreciation for the opportunity to actually meet one of the senior **carvers** on his last visit to the community. It would smear that if the carving expertise of the community is going to contribute to the tourism industry, personal contact with the carver(s) will be an important element. Visitors that are not familiar with soapstone **carving** may **otherwise** be unappreciative of the locally produced work. However, the experience of seeing a **carver** work,



handling the raw soapstone, and perhaps even visiting the soapstone quarry will add greatly to the visitors appreciation of the art.

On a personal note, when we visited the community in June, our discussion with **Simeonie** Opik was very informative regarding howhe selects a piece of stone, what he decides to **carve** and other activities related to caning. One of our party subsequently purchased a piece of his work from the Co-op. Being able to tell friends that you actually met the individual who **carved** a specific piece, adds immeasurably to the pride of ownership.

The Horizon Holidays tour escort, Mr. Bryan Bennet, mentioned the special efforts which had taken place to display the **carving** available at the Co-op and the good impression that it made on the tour group to meet with a caner. The raw pieces of soapstone which were handed out enabled each of the tourists to appreciate the process of **carving**. This was very effective and should be continued. In addition, should the tour group arrive on a workday (as opposed to Sunday) the opportunity of directly observing the process of **carving** would further enhance their understanding of the art.

The practice of having a broad selection of styles and subject **matter** (for example, figures representing more distinctive human forms together with different birds, whales and polar bear) available to visitors should be continued.

In summary, efforts to increase the **visitors** personal contact and understanding of the way in which carvings are inspired and produced, will take the community beyond simply offering their products for sale. Developing greater visitor appreciation for soapstone carving will further add to the reputation and value of **carvings** from the **Belchers**. However, steps should be taken which enable more than just one or two individuals to benefit directly from increased sales and market exposure. Rotating among those who display their work or have the opportunity to talk to the tourists will disperse the benefits to more than just a select few individuals.



1.4.2 Life on the Land

There are frequent periods during the warmer months when individuals from the community will spend extended periods of time in encampments out on the land. While traditional methods of hunting, trapping and living on the land have changed with the introduction and adaptation of new technologies, the process of living on the land offers several opportunities to share with visitors a fascinating and challenging lifestyle.

Activities such as fishing for sea urchin, sea cucumbers or catching ugly fish, ^{supp.} hunting seals and waterfowl, and the wide variety of other activities which take place on the land hold strong interest for visitors provided:

1. visitors can understand what is taking place;
2. visitors can participate to a **limited** degree; and,
3. visitors would not feel as if they are in the way.

It would also appear essential that at least one individual **within a** group be responsible for translating and explaining what is happening to a visitor or small group of visitors. Other issues related to the division of income between the families and/or individuals whom **are serving** as hosts, responsibility for meals and provision of ground transportation would also need to be clarified and clearly understood by all participants before this type of tour package could be offered.

The distinctive qualities of **Inuit** life on the land which create a basis for tourist appeal can be summarized as:

- o the variety of foods which the **Inuit** have developed to **survive**;



Exhibit 1
1985 Visitation Levels to Moosonee and Moose Factory

<u>Overnight Visitors</u>	<u>Est. 1985 Totals</u>
o Polar Bear Express (summer only)	8,000 persons
o Independent travelers (shoulder seasons)	800- 1,000 persons
o Hunters and Anglers (goose hunting and fishing camps)	500- 1,000 persons
o Campers (Tidewater Provincial Park)	<u>700- 1,400</u> persons
Sub-Total	<u>10,000-11,400</u> persons
<u>One-Day Visitors</u>	
o Polar Bear Express	14,000-17,000 persons
o Canoeists	<u>100- 300</u> persons
Sub-Total	<u>14,100-17,300</u> persons
Estimated Total Visitors	<u>24,100-28,700</u> persons

Source: Laventhol & Horwath. A Multi-Year Tourism Development Plan for Moosonee and Moose Factory. Phase 1 Progress Report, May, 1986.



- o the significant degree to which the community is still dependent on the land;
- o the mix of contemporary with traditional techniques of resource **harvesting**, balanced by a philosophy of taking what is needed;
- o the role of summer camps in the annual cycle of events and the complementary work by the entire family group;
- o The sharing of the **harvest** among family and non-family members of the community.

2.0 SUMMARY OF MARKET POTENTIAL

2.1 Existing Visitors to **Moosonee** and Moose Factory

While the exact numbers of tourists to Moosonee and Moose Factory are not known, it is estimated that there were approximately 26,000 people who visited the community in 1985. Most of these visit the community between late June and **Labour** Day by means of the Polar Bear Express. Exhibit 1, opposite, presents the relative numbers of the different types of visitors to this area.

Of these visitors, those individuals with the **greatest** potential to want to visit **Sanikiluaq** are the overnight visitors who purchase packages from the Ontario Northland Railway or associated tour companies. These numbered approximately 8,000 persons last year. A second, high potential group are the independent travelers who arranged their own trips in the late spring or early fall.



EXHIBIT 2

VISITORS TO CANADA FROM THE FEDERAL REPUBLIC OF GERMANY IN 1984 AND 1985

	JUNE	JULY	AUGUST	SEPT	TOTAL SUMMER VISITATION	PERCENT CHANGE	MARKET SHARE
CANADA							
1984	27,899	40,304	37,838	23,584	129,705		
1985	25,009	32,074	33,776	19,839	110,698	-14.7%	
ONTARIO							
1984	15,127	20,619	20,344	13,599	69,689		53.7%
1985	13,793	16,874	18,131	11,287	60,105	-13.8%	54.3%
QUEBEC							
1984	11,894	16,327	13,443	8,582	50,246		38.7%
1985	10,453	12,972	13,089	8,352	44,866	-10.7%	40.5%

SOURCE: STATISTICS CANADA. CATALOGUE 66 - 001. TRAVEL BETWEEN CANADA AND OTHER COUNTRIES. OCTOBER - DECEMBER, 1985.



It is **conservatively** estimated that **Sanikiluaq** might attract between 1% and 3% of these visitors each year, depending on the quality and promotion of appropriate tour packages. This would result in the following visitation levels:

1985 Overnight Travelers	
(Polar Bear Express and Independent):	9,000 persons
Low estimate (@ 1%)	90 persons
High estimate (@ 3%)	270 persons

A secondary market with less potential would be the hunters and anglers. Since most of these individuals are attracted to the facilities available at the goose camps along James Bay, it is considered unlikely that they will spend even more on airfare to pursue similar hunting opportunities in the **Belchers**. Based on similar capture rates as applied above, the number of potential hunters and anglers is much smaller:

1985 Hunters and Anglers	500-1,000 persons
Low estimate (@ 1%)	5- 10 persons
High estimate (@ 3%)	15- 30 persons,

2.2 Potential Visitors from Other Sources

Special interest naturalist groups have been targeted for increased promotion and facility development in Moosonee and Moose Factory. Should these efforts prove successful, then those naturalists attracted to the James Bay tidewater would become a high potential group for the **Belcher** Islands.

The European market, and especially the West Germans, represent a high potential market for quality tour packages. Exhibit 2, opposite, summarizes the level of summer visitation to Canada, Ontario and Quebec for 1984 and 1985 from West Germany. As can be seen, the majority of German visitors to Canada visit Ontario during their trip.



It is our considered opinion that a tour package targeted toward German tourists would attract individuals who could not afford the price of a trip to the High Arctic. **Sanikiluaq** can offer a competitive tour at a lower cost due to the reduced airfares required from **Moosonee**.

Other European countries, Japan and the United States represent similar markets with some potential to generate visitors to **Sanikiluaq**. Overall, the ability to capture a greater portion of this market than is presently achieved by Moosonee and Moose Factory depends primarily on improvements to the Polar Bear Express and to the quality of the tourism experience provided in these communities. Should these improvements materialize, then a tour package highlighting a visit to remote Canadian Indian and **Inuit** communities will be a strong product offering. At present, the weakness in the product offered and its reputation at Moosonee and Moose Factory is detrimental to further growth in this market.

There may also be a limited market available from faculties of higher education involving field trips for those in graduate programs at Masters and Doctoral levels in sociology, anthropology etc. Potential faculties at universities in the U.S. and Canada include the University of Western, Ontario, University of Toronto, McGill, the University of Chicago and other prominent programs.

3.0 TRANSPORTATION SERVICES

3.1 Air **Services**

Regularly scheduled air service to **Sanikiluaq** is available from Nordair and Air **Innu**it via Montreal, **Val D'Or**, **Le Grand** and **Kuujuarapik**. The cost of this route, roundtrip, is in excess of \$900. Excursion fares are available for approximately \$600 with certain booking restrictions.



The tour packages which **we** have investigated rely on charter air **services** from **Moosonee**, Ontario. Austin Air maintains a Cessna 402 in **Moosonee** which seats 6 passengers for a trip of this length.

Other Austin planes which could be scheduled into Moosonee should a group booking be confirmed include:

- o Beech 99. Seats up to 12 **for** long flights. Regularly available **in Moosonee** on Saturday and Sunday throughout the summer. Could be scheduled **in** during the week, should demand warrant; and,
- o HS 748. Seats up to 40 for-long flights. Would have to be scheduled into Moosonee.

Other planes could be made available as required. However, for the purposes of our analysis we have based our estimates on the above aircraft.

Bushland Airway of **Moosonee** was approached regarding their interest in handling charters to **Sanikiluaq**. However, their single-engine **planes** are not recommended for the length of open water flying required to reach **Sanikiluaq**.

3.2 Surface Transportation

3.2.1 Ground Transportation

A variety of vehicles are available locally which have been involved in transporting tourists, as follows:

- o Suburban Vans and Trucks. The **Co-op** has several vehicles which are used to transport motel guests *to* and from the airport.



0 All Terrain Vehicles. Commonly referred to as "Hondas" there is a number of 3 and 4 wheel **ATV's**. These are typically owned privately but have been used in transporting large numbers of guests from the airport to the community. Tourists have been very pleased by the opportunity to ride an ATV and in fact, Horizon Holidays felt it was preferable in many cases for their clients to be transported in this fashion rather than to step up into a high truck.

From reports on the previous tours of the **community**, it appears that extreme care was exercised by all of the ATV drivers to proceed slowly and carefully **in** order to avoid jarring or possibly-injuring a passenger. This approach is highly recommended from a passenger comfort point of view and critical from the perspective of liability should a mishap occur. The Co-op should confirm that its insurance coverage is adequate and provides coverage to those involved in transporting visitors within the **community**.

Trips by ATV outside of the community are slightly more complex. No less concern should be shown **in** providing for **visitor** safety and this should continue to be strongly emphasized to community residents. Some protection for liability could be **gained** through the use of release forms by the tour operator, **Co-op** and any residents engaged in **driving**.

On our excursion on the land we found that comfort varied greatly depending on the type of machine. More comfortable "Big Red" models are preferred because of the suspension system. The concern shown by the individuals who escorted our group avoided potential hazards and exercised great caution in rough areas.

costs for hiring a machine should probably be absorbed in the fees paid to a driver-escort, due to the low overhead costs of operating a Honda. A small



premium could be built into the hourly wage for a driver to cover these costs (for example, \$8.00 per hour for a driver and machine as opposed to \$7.50).

Other ground transportation capable of carrying more passengers is not presently available. It is not likely that the community or the Co-op could cover the cost of a special vehicle to move more visitors about than the ATV'S. Perhaps at a later date, an amphibious, multi-wheeled Argo with an 8-passenger capacity should be considered. However, **ATV's** are certainly more realistic and more flexible for the near future.

3.2.2 Water Transportation

There are a variety of aluminum and wood boats used in hunting and other economic activities available in the community. These vessels could be hired for transporting tour groups around Eskimo Harbour and across protected waters, given that adequate emergency safeguards are followed (not overloading the boat, carrying sufficient life **preservers**, and avoiding open, and potentially dangerous waters).

Measures to increase passenger comfort might include a wind screen, blankets and/or tarpaulin for protection from the elements, and seat cushions. Longer trips should ideally only be undertaken in vessels with an area where the passengers can get away from the direct effects of the wind.

Tourist in larger groups could be transported at the moment by an assembly of smaller boats as there is no vessel large enough to accommodate more than 8 or 10 passengers.

The Hunters and Trappers Association is considering seeking assistance from the Department of Renewable Resources for a large vessel to replace the damaged Peterhead boat in the harbour area. However, a formal application



has yet to be submitted and a demonstration of need provided to this Ministry. Tour groups would be an occasional user should such a vessel become available.

Individual forms of transportation such as sea kayaks and canoes would present a challenge to the tourist and community alike. Apparently some residents will still use a kayak as a recreational vehicle. Historically the residents of the **Belcher** Islands were renowned for their skill with the kayak, and as late as 1943, a party of 4 individuals **travelled** by kayak to Great Whale River in Quebec. Shortly after their return, two members of this party were drowned near the community, demonstrating how dangerous local conditions can be. It is therefore recommended that tourists interested in kayaking in the **Belchers** be restricted to areas near the community which are known to be safe and be accompanied by experienced local guides.

3.3 Accommodation

The **Amaulik** Motel, owned by the **Mitiq** Co-op, is the single accommodation establishment within the community. It was built primarily to **serve** construction workers and government personnel.

While the motel can accommodate up to 36 people at one time, this is not likely to appeal to tourists who would prefer a **greater** degree of privacy. For longer visits requiring up to 4 nights we recommend placing a limit on the size of the tour group. Depending on the group, a limit of 2 people per **room** or a party limit of 16 persons is recommended. This point was strongly emphasized in our discussions with Horizon Holidays who felt that most of the seniors needed a relatively private room or at most to share with only 1 other individual. Due to the amount of time that tour group participants spent together during the day, most older travelers prefer their privacy in their rooms.



what is
large group. 77

Meals for large groups at the motel would require two sittings. This is a slight problem and will require setting aside more time at meal times. Unfortunately, those involved in the second sitting don't have a lounge area or games room to relax in either before or after their meal. A separate common room should therefore be considered once tours become established.

An alternative in the immediate future for meal arrangements would be to split a large party into two groups and direct one group each meal to the new restaurant. This would add greater variety, a little healthy competition and further distribute some of the revenues from the tourists.

4.0 POTENTIAL EXCURSIONS

Tourist visits to **Sanikiluaq** could potentially involve excursions from several hours in duration (similar to the Horizon Holiday offering) up to visits of several days and even a week or more in length. We have not concerned ourselves with trips by individuals, families or small groups which would involve a minimum of community participation. It is conceivable that these types of tourist parties would arrange their own transportation, and come to **Sanikiluaq** to camp, hike or possibly to kayak. Since the revenue derived by the community **would** be very limited, we have not included these types of excursions in the proposed tours.

We have developed a series of packages involving different lengths of stay and a variety of community-based activities. These are developed below in terms of the logistics involved for each different time period and a series of themes which can be followed to organize activities and to market each package.



4.1 Day Visits

4.1.1 Basic Approach

Day excursions would be similar to the previous community tours offered by Horizon Holidays until this year. A day visit launched from **Moosonee** could however involve a longer period than the 3 hours which groups previously spent in **Sanikiluaq**. A **9:00** a.m. departure from **Moosonee** would result in a group arriving before lunch and possibly staying through dinner. A **7:00** p.m. evening departure would result in an estimated **9:00** to **9:30** p.m. arrival back in **Moosonee**.

The day long excursion package is seen as a visit kept primarily within the community. The length of time available precludes all but a brief excursion outside of the community.

From an organizational perspective, we recommend that the day excursion be kept as a special community event. Broad participation such as currently takes place for tourist arrivals in the community should be continued, as possible. This approach implies that the frequency of trips be **kept** to a minimum. More than 3 or 4 visits during the summer season would likely lead to lower participation and diminished enthusiasm.

4.1.2 Potential Activities

Activities which could be included in a day visit are as follows:

- o a low aerial approach over the **Belchers** to afford good sightseeing opportunities;
- o a country food meal for lunch and dinner. Arctic specialties can be a strong marketing item;



- o transportation to and from airport via **ATV's**;
- o community tours;
- o taming demonstration, question and answer period, and an opportunity to buy some soapstone **carvings**;
- o discussion/presentation with the elders about what life in **Sanikiluaq** is like; and,
- o opportunity to purchase locally produced souvenirs.

4.1.3 **Marketing** Strategy

The basic marketing angle which can be pursued in promoting one day visits to **Sanikiluaq** should emphasize the opportunity to:

- o visit the Northvest Territories;
- o visit a remote, unspoiled **Inuit** community; and,
- o view an Arctic environment.

Promotions should avoid declarations about **the** "midnight sun", exotic wildlife (including polar bears) and instead emphasize the trip as a community visit.

4.2 Overnight Excursions

4.2.1 Basic Approach

An overnight visit is organized around many of the same activities as a day excursion and in addition offers an opportunity to go out on the land for a



short time. The extended visit provides an opportunity for a less hectic visit, and creates a basis for a more in-depth view of life in the **Belchers**.

The overnight excursions can be organized and led by individuals from the community. **As** per the day long visit, a special community welcome and goodbye should be encouraged by a **number** of community residents.

There is a limited opportunity for a special purpose focus which is not possible on the shorter trips. However, most of the themed excursions will require longer stays.

4.2.2 Potential Activities

In addition to the activities proposed for a day trip, an overnight trip could include:

- o a trip on the land to Katopik, the Bluffs, **Kasegalik** Lake or other destinations within a short boat trip of the community (15-30 minutes);
- o alternatives to a trip on the land should be available if fog or strong winds delay or cancel the above activities. An alternative might be a demonstration of traditional kayaking along with a discussion with an elder showing how a sealskin kayak is made;
- o evening activities could include traditional games such as with strings and bones, radio bingo; and,



- o a film and/or slide show on the "discovery" of the **Belchers** by Robert **Flaherty** and the making of Nanook of the North.

4.2.3 Marketing **Strategy**

Unlike the brief day trip, promotion for an overnight trip can emphasize a theme of "discover the **Belchers**" and "experience the Arctic". Many of the same promotional elements apply that were described above, including the **limits** expressed for what shouldn't be emphasized.

4.3 **Longer** Term Visits

4.3.1 Basic Approach

Visits of **two** nights and longer would be developed as more specialized tours. They would require greater planning and a broader base of activities. Unlike the shorter trips, excursions lasting for 3 days and longer might involve a tour **co-ordinator** or host from outside the community, depending on the specialized focus of a theme for the tour package. For example, a trip emphasizing naturalist activities such as bird watching or highlighting local **carving** activities, might include an academic expert or professional with a background in the subject. **These** individuals are typically hired by tour companies and organizers and include **graduate** students, teachers with available time in the summer or even art **gallery** or museum staff.

The community involvement in the longer term visits would be dispersed over the **length** of the stay. Activities would need to be carefully planned, with **alternatives** available on a contingency basis. A welcome at the airport and special meeting or events would be scheduled throughout the visit.

The community role would be in support of and in collaboration with a tour **co-ordinator**, and is not completely replaced by these individuals.



4.3.2 Potential Activities

Excursions out on the land could take place for an extended period during a visit of several days. For instance, the opportunity to spend a night with community residents at a hunting or fishing camp should be considered. Activities would include many of the activities described for an overnight trip but on an expanded basis. Points of interest would include:

- o naturalist excursions involving a full day's **observations** at more distant locations than those visited on a day trip basis;
- o carving enthusiasts could visit the soapstone mine and **observe** the process of selecting and cutting pieces of stone;
- o staying with a large family group at a summer camp while hunting waterfowl and seals was **underway**; and,
- o a stop off at the **LG2** dam within the James Bay Hydroelectric project could be included on the return trip.

4.3.3 **Marketing** Strategy

Pursuing the more specialized markets such as naturalists and carving enthusiasts involves more direct, targeted efforts than the generalized community tours. Individuals who belong to special interest groups like the Federation of Ontario Naturalists can be approached through newsletters and brochures. Other groups are typically identified through low cost advertisements in special interest magazines. These contacts and approaches would be made by the tour organizer.



Packaging of the longer term excursions would likely involve promoting Moosonee and **Moose Factory as a** joint destination for the immediate future. This enables visitors to experience the transition of traveling from the outside world to a frontier community, followed by the step into the Territories. Mr. Bennet of Horizon indicated this allowed tour participants to appreciate the subtle changes which take place in the landscape and in connections with the outside world.

The marketing approach of cross-promoting the Cree culture of Moosonee with the Inuit culture of Sanikiluaq is not recommended at this time. Once cultural-based attractions are further developed in **Moosonee** and **Moose Factory** this will be viable. At the present time, it is our considered opinion that visitors interested in an in-depth form of cultural tourism would be very disillusioned by the presentation of **Moosonee** and **Moose Factory**. However, if the Cree Heritage Centre, Traditional **Cree** Village and the HBC Staff House are developed then a complete package can be promoted.

At the moment, **Sanikiluaq** can be promoted on its own merits without depending on a high quality product in Moosonee. Instead, **Moosonee** should simply be seen as the jumping off point for the trip.

4.4 Potential Themes for Tour Packages

In our recommendations for marketing strategies presented above, we have presented general guidelines for promoting the tour packages according to their lengths. In addition, potential activities can be highlighted in support of a theme for individual tour packages. The four principal themes which we recommend for tour excursions to **Sanikiluaq** are as follows:

1. Community Tour;
2. Life on the Land Tour;
3. **Carving** Appreciation Package; and,
4. Naturalist Tour.



In the following exhibits, **we** have identified a series of activities which can be offered in support of the principal tour themes. In addition, we have indicated those general activities which might also take place during a tour but could receive less emphasis in particular packages. For instance, **carving** demonstrations might be offered in several packages, however, for the carving appreciation tour lengthier **interviews**, discussions and **demonstrations** could be set up involving different caners. For the opportunities to buy **carvings** on this tour package might also be arranged especially since some of the participants could represent various galleries or museums.

Depending on the length of stay, various activities offer greater opportunities for participation. All of the excursions would likely refuel at **Le Grand**. The shorter excursions would only view the James Bay Power Development from the **air**. Longer term excursions could stopover for a brief tour of the **dam** facilities.



EXHIBIT 3
Activities and Events by Length of Stay
for Community Based Tour Package

	<u>General Activities</u>			<u>Community Events</u>						
	Reception at Airport	Sidetrip to LG2	Trip on the Land	Trip to Summer Camp	Country Food Meal	Community Tour	Carving Demonstration and Sales	Traditional Games and Radio Bingo	Meeting with Elders	Kayak Demonstration
Day Trip	x				x ,	x	x			
Overnight Excursion	x		2-3 hours		x	x	x			
Three Days - Two Nights	x	x	4-5 hours		x	x	x		x	
Five Days - Four Nights	x	x	up to 3 trip, possibly overnight	x	x	x	x		x	

EXHIBIT 4
Activities and Events by Length of stay
for Life on the land Tour Packages

	<u>General Activities</u>				<u>Events on the Land</u>			
	Reception at Airport	Sidetrip to LG2	Carving Demonstration	Community Tour	Meeting with Elder.	Overnight Stay	Day Trips from Community	Day Trips from Camp
overnight Excursion	X		X	X			X	
Three Days - Two Nights	X	X	X	X	X	X		
Five Days - Four Nights	X	X	X	X	X	X		

EXHIBIT 5
Activities and Events by Length of Stay
for Carving Appreciation Tour Packages

	<u>General Activities</u>			<u>Special Events</u>				
	Reception at Airport	Sidetrip to LG2	Community Tour	Trip on the Land	carving Demonstration	Sales Display(s)	Trip to Quarry	Special Sessions with Individual Carvers
Overnight Excursion	X		X			X		
Three Days - Two Nights	X		X	2-3 hours		X	X	X
Five Days - Four Nights	X	X	X	4-5 hours		X	X	X

EXHIBIT 6
Activities and Events by Length of Stay
for Naturalist Tour Packages

	<u>General Activities</u>				<u>Naturalist Activities</u>			
	Reception at Airport	Sidetrip to LG2	Community Tour	Carving Demonstration and Sales	Meeting with Elders	Stopover at Cape Henrietta Maria	Overnight Stay on Land	Day Trips from Community
Three Days-Two Nights	X	X	X	X			1 night	Up to 2 trips
Five Days-Four Nights	X	X	X	X	X	X	2 or 3 nights	1 trip in addition to trips from camp



EXHIBIT 7

ANALYSIS OF ANTICIPATED COSTS FOR TOURS
FROM WOODBINE, ONTARIO TO SANIKILUAG, NWT

TOUR TYPE	# OF TOURISTS	AIR ACCOMMODATION & MEALS	BOATS & LOCAL TRANS.	COMMUNITY ACTIVITIES	WHOLESALE MARKUP	TRIP COSTS	ESTIMATED COMMISSIONS	TOTAL PACKAGE COSTS	PRICE PER PERSON	DIRECT COMMUNITY REVENUE	
DAY TRIP	6	\$1,900	--	--	\$360	\$565	\$2,831	\$283	\$3,114	\$519	\$360
	12	\$2,500	--	--	\$720	\$805	\$4,037	\$404	\$4,441	\$370	\$720
	36	\$6,800	--	--	\$2,160	\$2,240	\$11,236	\$1,124	\$12,360	\$343	\$2,160
OVERNIGHT EXCURSION	6	\$2,400	\$840	\$150	\$260	\$938	\$4,688	\$469	\$5,156	\$859	\$1,350
	12	\$3,000	\$1,680	\$300	\$720	\$1,425	\$7,125	\$713	\$7,838	\$653	\$2,700
	30	\$7,300	\$4,200	\$750	\$1,800	\$3,510	\$17,563	\$1,756	\$19,319	\$644	\$6,750
THREE DAYS TO NINE NIGHTS	6	\$3,600	\$1,680	\$300	\$420	\$1,550	\$7,750	\$775	\$8,525	\$1,421	\$2,400
	12	\$5,000	\$3,360	\$600	\$840	\$2,450	\$12,250	\$1,225	\$13,475	\$1,123	\$4,800
	30	\$12,600	\$8,400	\$1,500	\$2,100	\$6,400	\$32,000	\$3,200	\$35,200	\$1,173	\$12,000
FIVE DAYS TO ELEVEN NIGHTS	6	\$5,800	\$3,360	\$450	\$420	\$2,118	\$13,928	\$1,394	\$15,322	\$1,241	\$4,200
	12	\$8,000	\$6,720	\$900	\$840	\$4,235	\$16,825	\$1,683	\$18,508	\$1,542	\$8,400
	30	\$17,600	\$16,800	\$2,250	\$2,100	\$8,469	\$47,428	\$4,744	\$52,172	\$1,739	\$21,000

SOURCE: LAVENTHOL & MORRATH. TO BE READ ONLY IN CONJUNCTION WITH THE ASSUMPTIONS PRESENTED IN OUR REPORT DATED MARCH 6, 1987.



5.0 PROJECTED **TRIP** COSTS AND RECOMMENDATIONS

5.1 **Package** Costa

Exhibit 7, opposite, presents an analysis of anticipated tour costs. The assumptions used to **derive** the projected trip costs **are** as follows:

- o **Air Travel.** Air services are based on estimates provided by Austin Airways for a Cessna 402 (6 seats), Beech 99 (12 seats) and an HS 747 (up to 40 seats). costs are based on air mileage charges from **Moosonee** with refueling in **Le Grande**. Day trips are projected as direct trips with no extra charges. overnight trips will require an additional \$500 (approximately) for layover time. Trips longer than two nights will incur double charges for a return trip to **Sanikiluaq**. These charges may be negotiable based on **repeat** business, airplane availability, etc.
- o **Accommodation** and Meals. Motel charges have been included at a rate of \$140 per **person** per night, including 3 meals. Since this is revenue directly benefiting the community we have not projected **any** group discounts based on volume. However, the Co-op Board of Directors indicated their willingness to negotiate special group rates.
- o Guides and **Local** Transportation. Excursions on the land have been costed based on boat **rental** fees of \$35.00 per hour to cover operating costs (equipment and gas). In addition, the boat operator (guide) is



included at a rate of \$15/hour, A three hour trip for 6 visitors by boat is estimated to cost \$105.00, as follows: \$105.00 for boat rental, plus guide fees of \$45. Boat capacity has been considered at 6 persons. The 3-day package includes boat rental and guide fees for a 6 hour period, which would be undertaken in two excursions on separate days.

- o **Community** Activities. This past year, Horizon Holiday and the **Mitiq Co-op** negotiated a fee of \$36 per tourist for the following **services**:

reception and transportation from the airport;
country food **meal**;
special opening of **Co-op** store on Sunday and table displays of **carvings**;
meeting with carver **at** the store;
community tours; and,
related co-ordination and organizing.

We have included a fee of **\$60** per person in each of the tour packages based on the following **assumptions** for a group of six:

<u>Activity</u>	<u>Cost per Person</u>	<u>Trip Cost</u>
Interpretation (10 hours @ \$15/hour)	\$25	\$150
Elders (2) (2 hours each @ \$15/hour)	\$ 5	\$ 60
Carver (2) (1 hour each @ \$15/hour)	\$ 5	\$ 30
Promotional Souvenir	\$ 5	\$ 30
Information Package	\$ 2	\$ 12
Co-op Administration (@ 20% total costs)	<u>\$13</u>	\$ <u>78</u>
Total	<u>\$60</u>	<u>\$ 360</u>



In the longer stay packages additional activities will be required and a slightly higher rate has been used. However it is assumed that expanded community activities will be developed and costed by the tour operators and **Co-op** staff.

- o **Wholesale** Mark-up. A mark-up of **25%** above wholesale costs has been included to defray the costs of marketing, administration and organizing by the tour wholesaler. This fee also can be expected to **vary** with factors such as marketing strategies and level of sales. In addition, this mark-up is needed to cover the cost of empty seats and could easily range up to 40% should visitor demand **not be** realized.
- o **commissions**. A sales commission of **10%** has been included based on discussions with tour retailers. This rate will vary with the volume of packages sold and may vary depending on the travel agents contacted.

Individual package price is calculated **based** on tour packages from **Moosonee**. Additional fees such as transportation to Moosonee will cost approximately \$27 per adult for the Polar Bear Express plus overnight room and meal charges in **Cochrane** and in **Moosonee** which would likely cost \$100 per person. It is conceivable that these costs would be included in a complete package.

Direct community revenue is shown to summarize the level of revenue which would be spent in the community as opposed to air travel, commissions and wholesale costs.



5.2 **Summary**

Based on our professional **judgement**, we recommend that **Sanikiluaq** place its initial efforts on attracting visitors with the **overnight excursion package**. Of these, parties up to 12 and up to 30 are the most economical and therefore competitive product offerings. This opinion is based on several factors, as follows:

- o The \$600 cost level is not prohibitive to individuals desiring exposure to the Arctic;
- o The length of time spent in the community (approximately 30 hours) allows a more complete visit than a day trip (approximately 6 hours) for less than double the price (\$650 compared with \$340 to \$370);
- o The direct community revenue is significantly **higher** for the overnight visit than for the day trip.
- o After the overnight excursions have been established as a competitive product, the community will be in a better position to organize and offer **longer** visits.

Of the **longer** excursions we recommend **pursuing 3 day packages** for 12 **people**. The cost level is very competitive **with** the estimated cost of larger parties (approximately \$1,100). The logistics involved in providing for an extended visit by a group of 30 become **quite** complex in terms of interpreters, local transportation and meals. More important, the motel would be very crowded with 30 individuals given its present layout.



Clearly there is an incentive to attracting larger tours for longer periods based on the level of direct community revenue. However, until there is a track record established from successfully handling the overnight excursions, the risks involved, the quality of **the** physical product compared to other locations, and the high level of community participation and involvement point to waiting until the individuals involved have gained experience and confidence with the shorter excursions.

In summary, the enthusiasm, friendliness and warmth which have been demonstrated on the few tourist visits to date should be developed as a focal point for future trips. If the community of **Sanikiluaq** can deliver this **type** of experience on a more frequent schedule -- up to 5 or 6 times during the summer season -- then a quality tourist industry can be built.



EXHIBIT 8

Summary of Activity Interests
Expressed by Surveyed Tour Operators

	Naturalist Excursion	Photography/ Scenic Viewing	Wildlife Viewing	Outdoor Adventure	Sportsfishing	Community Activities	Carving	Soapstone Mine
American Tours Inc.		X					X	
Canada North Outfitting	X		X		X	"If unique"	X	
Ecosummer Canada	X	X	X	X				X
Federation of Ontario Naturalists	X		X					"Minor Emphasis"
Festa Wayfarer		X				X	X	X
Goliger's Tours Ltd.			X	X		X		
Great Canadian Travel Company		X	X			X	X	
Great Expeditions	X			X				
Nature Photography Workshops		X	X					
Expedi ia Interestours	X		X	X		X		X
Number of References	5	5	7	4		5	5	3



6.0 SURVEY OF TOUR OPERATORS

A telephone survey of tour operators was undertaken to determine whether specific tour companies might be interested in learning more about Sanikiluaq as a potential tour destination. Tour operators were identified that have previously led tour groups into the Northwest Territories or to Moosonee and Moose Factory. We attempted to select operators with expressed interest in cultural tourism or activities which we felt would be compatible with community-based tourism.

Of 15 operators whom we were able to contact, 11 individuals indicated that they would like to learn more about the community and its potential to host tour groups. A list of tour operators included in the survey is presented in Appendix B.

Exhibit 8, opposite, presents a summary of the interests expressed by the tour operators contacted. In general, it appears that the desired tour activities are compatible with community interests expressed to us during the study. One exception was a desire to participate in sportsfishing. The same operator did indicate a range of other activities so we would not recommend that they be excluded at this time although sportsfishing should continue to be discouraged until stock levels are secure.

A reasonable level of interest was expressed in community tour activities. One operator stressed that attempts should be made to have community activities which are unique to Sanikiluaq and distinctive from other communities.

Carving was indicated as an interest of four operators provided that an affordable range of prices was available. Two other companies were also interested in learning more about the possibility of a mine tour. This would be a good excursion opportunity provided that safe travel conditions persist. It would be useful to have a carver lead such a trip, with an interpreter, to show how stone is mined and selected.



Two groups with a naturalist orientation, **Ecosummer** Canada and the Federation of Ontario Naturalists, **would** be interested in organizing longer visits, should they decide to go ahead with tours. This **would** also require special arrangements for stays of 1-2 weeks.

Wildlife **viewing was** most frequently reported as the activity **which** would draw **visitors**. In this regard, further consideration of how to guarantee viewing opportunities should be undertaken prior to any trip arrivals. Marine mammals and reindeer would head the list of interesting species.

Naturalist excursions, **while** including wildlife viewing, could also involve wildflowers, herbs, interesting **geological** formations, waterfalls, etc. A visit to a summer camp would also be an appropriate activity for those companies expressing interest in this area.

SUMMARY

We consider the preliminary expressions of interest by these tour operators as extremely promising. Nonetheless, there are several steps which need to be completed before tour companies would arrive. These items are addressed in our conclusions (**following** section).

These operators were selected for the telephone **survey** because they are **already** familiar with **NWT** tour opportunities. As a result, they are likely to be interested in a more accessible Arctic **destination** and a traditional community lifestyle such as offered by the **community**. Before they can be expected to sell **Sanikiluaq**, they will need to be convinced of the following:

- o reliable air access (particularly fog conditions);
- o **clean**, comfortable motel accommodation, preferably with two persons per room; and,
- o consistent, high quality program support from within the **community**.



7.0 CONCLUSIONS AND RECOMMENDATIONS

7.1 Summary of Conclusions

We are **convinced** as a result of our community visits and discussions, as well as from our **survey** of tour operators that **Sanikiluaq** does have potential as a culturally-oriented tourism destination. Its market appeal is specialized, rather than broad or mass market in orientation. The limited market appeal is due to the nature of the resource base, particularly with respect to wildlife and scenery. At the same time, the community's capacity to handle tour groups on a frequent basis is unproven and has been assumed to be somewhat limited by the existing Motel capacity and by organizational resources.

Sanikiluaq's proximity to southern markets (and therefore lower relative costs) compared with other Arctic destinations and its location relative to **Moosonee** provide the community **with** certain advantages relative to other northern destinations such as certain Churchill, Manitoba or more appropriately, Eskimo Point, N.W.T. Moosonee presents disadvantages as well because of the following factors:

- o the Polar Bear Express is associated with medium to low cost bus tours ;
- o **community** attitudes are not receptive to community-based tourism;
- o the existing tourism facilities run at or near capacity for the **summer** season.



Despite these negatives, the volume of tourists attracted to **Moosonee** create the most realistic departure point for visiting **Sanikiluaq**. A package tour offering a visit to both a northern Ontario Cree community and an Inuit community are attractive in the tourism marketplace and without the number of potential visitors to draw from in **Moosonee**, it is not considered likely that **Sanikiluaq** could attract tour groups on its own accord. Instead, its position should be developed **as a** destination linked to **Moosonee** and other regional attractions such as the James Bay Power Development at Le Grande, Quebec and Polar Bear Provincial Park in Ontario. These points are important **because they offer** alternative stopping-off points should weather conditions **delay** access to the **Belcher** Islands.

The cost analysis of potential tour offerings presented in Exhibit 7 presents the base cost of trips from **Moosonee** to **Sanikiluaq**. Options for stopovers should delays be encountered due to weather or as an enhanced tour offering will need to be arranged directly with the air carrier and the stopover point. However, these costs are not expected to be prohibitive or to change the basic **costs** significantly. Furthermore, any savings which can be achieved in negotiating special rates from the Co-op Motel and the air carrier could offset any additional *costs*.

A final condition which must be considered **because** of its significance to the community, is the desire not to have tourists arrive or depart on a Sunday. Preferably, short duration visits (ie. up to 2 nights in the community) can be scheduled for other times during the week. Should a longer visit involve a Sunday, then activities which do not involve Sunday employment (eg. a naturalist hike, photography) should be included.



7.2 Recommendations

To encourage tour opportunities for the community, we recommend that the following steps be undertaken:

1. **Apply** to the Department of Economic Development and Tourism for assistance to upgrade the rooms, toilet facilities and dining room at the motel. A room capacity of 2 persons (as opposed to four) should be pursued.

A total room capacity is difficult to estimate prior to a **space** designer assessing the facility. Tour groups consisting of 12-14 people are desirable from **the** point of view of activities, language interpretation and programming. An increased number of rooms would be difficult to justify solely on the basis of tourism potential. However, tours should not be booked for a time when construction activity might be taking place and workers are filling or almost filling the motel. In addition to the general room improvements, a separate lounge (non-licensed) and TV room is needed aside from the existing dining room.

2. Follow-up Activities to this Study

Further contact with tour companies expressing interest in Sanikiluaq **from** the telephone **survey** and with tour companies which presently visit Moosonee and **Moose** Factory is required. We recommend that an "Information Package" in a brochure format be developed and distributed to the above-noted tour operators.

In addition, to develop a greater degree of familiarity with **Sanikiluaq** on the part of potential tour operators we further



recommend that a "familiarization trip" be organized for the summer of 1987. Operators should **be** carefully screened to invite only those individuals (and possibly their spouses) with a strong inclination to pursue a **Sanikiluaq** tour package. As possible, a travel writer with a national reputation should be included on the "fan trip" to develop market exposure for the **Belchers**.

Finally a Tourism Sub-Committee, reporting to the Economic Development Committee is recommended to coordinate local planning activities for potential tour groups. Representation from those individuals involved in past tours is desirable for continuity. Representation from the **Co-op** will be needed to make- arrangements for the motel, display of **carvings**, and involvement of **Co-op** staff in tourism activities . Ideally the **Co-op** should be represented by the **Co-op** manager.



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APPENDIX B
LIST OF TOUR OPERATOR CONTACTS

1. TOUR OPERATORS EXPRESSING INTEREST IN SANIKILUAQ

American Tours Inc.
7400 **Metro** Blvd.
Suite 447
Minneapolis, **Minn.**
55435

Contact: Mrs. Dee Larson
(612) 835-5151

Canada North Outfitting Inc.
P.O. Box 1230
Waterdown, Ontario
NOR 2H0

Contact: Mrs. **Halina** Knap
(416) 689-7925

Ecosummer Canada
1516 **Duranlean** Street
Vancouver, B.C.
V6H 3s4

Contact: Mr. Jim Allen
(604) 669-7741

Federation of Ontario Naturalists
355 **Lesmill** Road
Toronto, Ontario
M3B 2W8

Contact: **Ms.** Pamela Burton
(416) 444-8419

Fiesta Wayfarer
255 **Yorkland** Blvd.
Willowdale, Ontario
M2J 4Y8

Contact: **Ms.** Bonita Albert
(416) 498-5566



Goliger's Tours Ltd.
25 Adelaide Street East
Toronto, Ontario
M5C 1Y2

Contact: Mr. O'Flynn
(416) 860-1719

The Great Canadian Travel Company
245 Bell Avenue
Winnipeg, Manitoba
R3L 0J2

Contact: **Ms. Wendy Torgasows**
(204) 284-1580

Great Expeditions
5915 West Blvd.
Vancouver, B.C.
V6M 3X1

Contact: **Mr. Fraser Maclain**
(604) 263-1476

Nature Photography Workshops
944 **Windermere** Avenue
Winnipeg, Manitoba
R3T 1A1

Contact: Mr. Robert Taylor
(204) 453-8337

Sobec Expeditions Inc.
159 Main Street
Unionville, Ontario
L3R 2G8

Contact: Richard J. Deacon
(416) 479-2600



Special Interest Tours
P.O. Box 37
Medina, Washington
98039 U.S.A.

Contact: Mr. Skip Voorhees
(206) 455-1960

COMPANIES NOT INTERESTED

Arctic Adventures
Montreal, P.Q.

Dan Dipert Tours
Arlington, Texas

Equinox Adventures
Beamsville, Ontario

Hanover Holiday Tours Ltd.
Hanover, Ontario

COMPANIES UNAVAILABLE FOR INTERVIEWS

Victor Emanuel Tours
P.O. Box 33008
Austin, Texas
78764

Contact: **Mr. Randy Green**
(512) 477-5091

Inuit Art Enthusiasts

Information has no listing for this company

Far North Expeditions
(705) 673-9032



Clearwater Tours
Winnipeg, Manitoba

Information has stated no listing for this company

Photosynthesis
Saskatoon, Sask

Contact: **Coureny Milne**
(306) 373-7084

Consolidated Tours Inc.
Montreal, P.Q.

Information has listing for this company

Thru-The Lens Tours
Culver City, California

Information has no listing for this company



c. Four Point Approach

The Local Co-ordinator will plan and implement activities in four areas: Organization, Product Development, Marketing, and Tourism Development.

1. Organization

The objective of the organizational component is to bring the people of a region together to work towards a common goal. Formerly fragmented commercial, , industrial, cultural, natural, educational and tourism energies pull together to make their region an attractive tourism destination.

Overseeing the project is a Residents Committee. Composed of representatives of the citizens of the region, this body is central to the whole process. It is mainly through this committee that collaborative action is generated, and the population's participation and interest is triggered and sustained. The Committee decides which resources to develop and turn into attractions, and which actions would be of most benefit to the region.

An Executive Committee is chosen from within the Residents Committee. This executive will oversee the day-to-day operations of the project. The Residents Committee and all its sub-committees are both doers and catalysts. It is a catalyst in that it is a vehicle to broaden the base of the programme amongst the citizens of the region. The Residents Committee is the key to the organizational structure. The Residents Committee functions through sub-committees (e.g. Resource Identification, Economic Development), which are set up depending on the region's needs.

Acting as a resource to the Residents Committee is a Technical Advisory Committee made up of local specialists from disciplines such as historical research, restoration architecture, design, regional planning, conservation of artifacts, biology, forestry, and water conservation and supplemented by outside specialist as the need arises. This group 'is organized according to the needs of the community. The specialists, who work on a voluntary basis, operate closely with the residents, guiding their activities by giving them advice on how to undertake certain tasks. In turn, the residents (who are often the real experts) contribute their own specialized knowledge.

2. Product Development

The entire region or territory has to be considered as "the product," with all its human, natural and man-made resources working together in unison. The Co-ordinator works closely with the population, the heritage and nature conservation groups and other people or institutions to research potential attractions, develop means to care for them and to turn the following resources into real attractions:

- a. Natural: typical fauna and flora, vistas, natural elements of exceptional beauty or significance.

- b. Man-made: buildings, structures, machines, and archaeological remains of local, regional or national significance; industries and farmsteads connected with the area's development; transportation routes and curiosities.
- c. Human: people who possess a unique skill, are famous for accomplishments, or have an exceptional knowledge of local history or events; native or ethnic communities with a distinct culture.
- d. Traditions: sporting events, festivals, fairs, parades, farming, business and industrial traditions.

All of these resources will be linked together into a regional story, with all the elements building on, and reinforcing each other.

3. Marketing

The Residents Committee will select suitable marketing themes which reflect and integrate the key aspects of the regional character. The emphasis will be on attractions which work well for residents. If they work well for residents, they will also contribute to the visitors "sense of place."

This approach to tourism development is an incremental, rippling process starting with the local population, then working its way to the provincial, national and international markets.

The project will work to fulfill the needs of two distinct target markets:

- a. The residents market: The regional stories and related attractions will have to be marketed to the local population so that they can get involved in celebrating their own unique identity and presenting it to others. The residents will have to plan how to best accommodate increased numbers of visitations and learn how to appreciate the visitor's expectations.
- b. The visitors market: In order to compete in the provincial, national and international markets, the citizens must learn modern marketing techniques to promote the regions. To get the maximum impact, regional resources will be pooled and integrated.

4. Economic Development

Tourism can be the instigator of economic growth for the community. The Local Co-ordinator will work to ensure advantage is taken by the private sector and all levels of government of the opportunities created by the *Regional Heritage Tourism Strategy*. The project will work at several levels:

- a. Regional economic issues: broad planning, transportation routes, attraction of new industries, user fees, funding for projects.
- b. Identification and recruitment of new services.
- c. Development of individual attractions through private and public moneys and volunteer work.

c. **The Three Year Programme of Activities**

During the three years of a project, the citizens and business people of the community will undergo a process that is both flexible to take into account local conditions and concerns and rigid to ensure that the final result is an integrated product and that the citizens and business people have the opportunity to explore all avenues of change.

The sequence of activities involves different facets of the region. While the Residents Committee ultimately is responsible for the changes that occur in the region, it is actually the sub-committees and the Local Co-ordinator that implement the changes. Working on a day-to-day basis with the sub-committees, the Local Co-ordinator facilitates the work that the citizens wish to undertake. The Strategy divides the schedule of activities into two concentrations: activities directed at the Local Co-ordinator's personal development and activities directed at the citizens of the region. -

During the first year, the citizens and business people of the region will begin the process of product development: first in resource identification then in actually enhancing or stabilizing the assets of the region. The Local Co-ordinator is meanwhile trained in a number of areas to enable him (her) to provide the citizens and business people with help.

The citizens and business people will participate in a number of goal setting exercises and a seminar to help them decide on the scope, objectives, and form of the changes they wish to undertake. Given that the region may contain upwards of a hundred thousand people and that the project may never be finished even though the external agencies' involvements do, it is important that the first year's organizational activities are thorough.

In the second year of the project, the emphasis is on marketing. The citizens and business people will be helped to make marketing decisions for future product development and promotion. Two seminars and the development of a marketing plan are scheduled for this year. The Local Co-ordinator will attend further professional development activities and will attend two networking meetings.

In year three, the project will concentrate on promoting outside the region and building the tourism infrastructure.

The exact timing of the programme activities will vary depending on the local conditions. It is the basic sequence of events which is important. It ensures that there is a logical and systematic development of the heritage resources and tourism services. Each project will decide on its own specific schedule based on the framework. A detailed schedule of events and their description is shown in Appendixes B and C respectively.

D. Monitoring and Evaluation

An integral part of the *Regional Heritage Tourism Strategy* is a monitoring and evaluation system. The system measures both the progress of the regional projects and the development of the overall programme. These measurements will provide an indication of how well the projects and the programme are doing and will point to modifications that might be required.

1. Project Evaluation

A monitoring and evaluation system is integrated into the three year process. Baseline data is accumulated prior to the official start of the project and during the first half year of the project. Approximately every twelve months a "Check-up and Refocus" session will be held in the region to ensure that the project is on track and to ensure that the objectives of the programme are being met or if they need readjustment. At the end of the third year a formal evaluation of the project will be completed.

Each project will have several "milestones" or key points of achievement. The exact date at which the "milestones" are reached will vary from project to project to reflect the circumstances of the individual regions. The dates are indicative of the sequence of events. The "milestones" are listed in Appendix D.

2. Programme Development

The development of the Regional Heritage Tourism Strategy programme will follow two tracks. The first is *the* development of the events and activities which will take place in the projects. The second is the development of the training materials, marketing programmes, publications, networking, and other management activities which are necessary for the development of a model and the continuance of the Strategy after the conclusion of the demonstration projects. Appendix E shows the milestones of the development of the activities and events for the projects. Appendix F shows the milestones for the development and the management of the Strategy.

V. THE HERITAGE CANADA FOUNDATION IMPLEMENTATION STRATEGY

A. A National Demonstration Programme

The Heritage Canada Foundation is undertaking a National Demonstration Programme in collaboration with federal, provincial, municipal, private, or other partners interested in applying the *Regional Heritage Tourism Strategy*.

Heritage Canada will support an office and support a full time Programme Director to the task, of developing, managing and monitoring this new programme. The Foundation will provide training and on-going consultation services with the assistance of the partners to the Local Co-ordinator and the project.

In the immediate future to meet the initial demand, three "Demonstration projects", will be created to fine tune the approach and develop unique and truly Canadian expertise and experience. Each project would last for at least three years. It is felt that three projects can be effectively managed by the Programme Director and that three projects will provide the breadth necessary for the development of a good model process. However, if strong interest is shown from other regions, Heritage Canada will explore instituting addition projects.

B. Other Partners

Heritage Canada will seek to gain the assistance and collaboration of federal and provincial heritage, economic, and tourism agencies in designing and carrying out the process. The partners will assist in selecting the regions and will have a specific role in the Strategy:

1. Heritage Canada

Heritage Canada will act both as the developer of the processes and programme and as the day-to-day manager of the total programme. It will act as the prime contractor and will set the direction of the programmers development.

2. Volunteer Provincial Heritage Organizations

From time to time, these organizations will provide training, consulting services, and help in team building in the projects. These organizations will act as a subcontractor to Heritage Canada.

3. Federal Government Agency

The federal government will be approached to finance a portion of the programme through one of the federal-provincial economic sub-agreements already in place.

4. Provincial Government Agency

The provincial government will be approached to finance directly a portion of the programme and will, as needed, provide guidance in both the tourism and heritage aspects of the projects. Furthermore, the Provincial Government Agency involved in this programme will maintain liaison with other provincial departments or agencies such as Parks, Highways, Economic Development, Heritage, Tourism, Education and Environment.

5. Regional or Municipal Governments

Local government and the business community will aid in the dissemination of information, in the identification of resources, and the organization of the committees. They will be expected to contribute financially to the operation of their project.

6. Tourism Associations

The tourism associations will provide tourism expertise in the form of training and consulting in the marketing the product as it is developed.

7. Museums and Local Heritage Organizations

These institutions and groups play an important role as sources of community heritage expertise. They will provide assistance in resource inventory and theme definition and will be active in training other members of the community in techniques of investigation, resource care, and interpretation.

c. Time Frame

Beginning in 1987-88, the *Regional Heritage Tourism Strategy* programme will last five years:

- 0.5 year: Programme preparation and project selection.
- 3.5 years: To operate the three year demonstration projects. Beginning and ending of the projects are 'staggered.
- 1.0 year: To build on the experience of the Demonstration Projects to develop a model which could be widely applied.

VI. BENEFITS OF THE STRATEGY

A. Economic Benefits

The *Regional Heritage Tourism Strategy* will produce an anticipated increase in construction, retail sales, tourist visitation, and income tax. Some of the returns accrue to the region, others directly to the provincial and federal treasury.

Figure 2 shows the anticipated impact of the *Regional Heritage Tourism Strategy* is based on statistics from the Tourism Canada's publication 1987 Tourism Impact - The Facts and on a fraction of the construction multiplier produced through the *MainStreet* programme. The construction multiplier has been discounted to take into consideration the difference in the the amount of time the Local Co-ordinator will be spending working with building owners.

Figure 2

Economic Impact of the
*Regional Heritage Tourism Strategy**
for One Region

	Additional Visits per Year			
	2000	5000	10,000	20,000
Tourism Receipts	\$602,280	\$1,505,700	\$3,011,401	\$6,022,801
Direct and Indirect Income	\$1,083,398	\$2,704,394	\$5,416,988	\$10,833,975
Government Revenues	\$272,616	\$681,540	\$1,363,080	\$2,726,161
Investment	\$95,372	\$238,430	\$476,859	\$953,718
Construction	\$2,345,530	\$2,345,530	\$2,345,530	\$2,345,530
TOTAL IMPACT	\$4,399,196	\$7,479,694	\$12,613,858	\$22,882,185
Jobs Created	34	84	169	338

The anticipated impact of the *Strategy* on each project will conservatively total over seven million dollars at an increase of 5,000 visits per year. Eighty-four new jobs will be created.

The overall *Regional Heritage Tourism Strategy* Demonstration Projects, at the 5,000 visits level, would have an economic benefit of over 22 million dollars and would create 252 new jobs.

* See Appendix G for summary of calculation of impacts.

B. Other Economic Benefits

1. To the Region:

- a. New jobs at low cost.
- b. Local people explore their own regions so that their tourism dollars are expended within the territory.
- c. Increased property values and property tax assessments.
- d. Increased tourism visitations and overnight stays.
- e. Regional growth.
- f. Development of the physical infrastructure of the region. New transportation links, services, and amenities are created.

2. To the Province:

- a. Increased tourism and tourism related activities such as construction and retail sales will increase sales and user tax receipts.
- b. Local tourism dollars will remain in the province.
- c. Enhancement of the overall provincial mix of attractions.

3. To the Country:

- a. Positive effect on the nation's international balance of payments and gross national product by encouraging Canadians to be tourists at home, and by making Canada a more attractive destination for foreign visitors,

c. Social Benefits

I. To the Region:

- a. Better care, enhancement, and efficient use of scarce heritage resources.
- b. Social cohesion amongst the citizens of a region and a better understanding by the citizens of their living place and their role in it.
- c. Improvement in the quality of life in small communities due to the wider contact with new activities and experiences.
- d. Citizens take care of their own resources and so feel more responsible towards them.

- e. Citizens have increased say in the planning of their region.
- 2. To the Province:
 - a. Help for provincial heritage agencies in their efforts to care for heritage resources by in effect creating a volunteer army of citizens working with similar goals to those of the agencies.
 - b. Provide an opportunity for all partners and volunteer organizations to strengthen their skills and experience in such areas as organizing locally, training, and working with business.
- 3. To the Country:
 - a. Canadians discover other Canadians.
 - b. Strengthening of ties between regions and different Canadians.
 - c. Strengthening of the Canadian identity and bonding of the Canadian mosaic.

VII. RECOMMENDATIONS

- A. That the provincial government becomes a partner with Heritage Canada to develop the Regional Heritage Tourism Strategy.
- B. That the federal government, through existing federal-provincial agreements where possible, also become a partner.
- c. That Heritage Canada and its partners together examine potential projects.
- D. That Heritage Canada, its partners, and regional representatives initiate projects in three regions.

VIII. FOR MORE INFORMATION

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APPENDIXES

APPENDIX A

DRAFT JOB DESCRIPTION FOR LOCAL CO-ORDINATOR

- General Duties: The co-ordination of activities of the *Regional Heritage Tourism* project office. Under the direction of the director of the *Regional Heritage Tourism* programme, the Local Co-ordinator assumes responsibility for developing and implementing the programme in the region where the project office is located.
- Specific Duties:
1. Open and manage a *Regional Heritage Tourism* project office within a designated area of the participating region.
 2. Advise and assist the people of the region on the techniques of tourism and attraction development.
 3. Promote a strong and dynamic image of the region by aiding the citizens to organize effectively, utilize local skills and initiatives, and co-ordinate unified marketing and promotional activities.
 4. Organize, where appropriate, informational sessions for the citizens of the region on topics relevant to tourism.
 5. Develop strategies to assist business recruitment in order to strengthen the tourism service infrastructure. Assist in the development of projects which will have a positive economic impact on the region.
 6. Provide, upon request, advice for the identification, renovation, restoration, or interpretation of historical resources in the region.
 7. Bring to the attention of the director of the *Regional Heritage Tourism* programme any particular event or issue relevant to the national aspect of the programme.
 8. Collaborate with the director of the *Regional Heritage Tourism* programme in the production of technical reference material.
 9. Collaborate with the director of the *Regional Heritage Tourism* programme as required to facilitate the monitoring and evaluation of the project.

Monthly Reports

In addition to these duties, the co-ordinator is required to prepare a monthly status report for the director of *Regional Heritage Tourism* programme.

The report shall include the following:

1. Current activities, projects in progress, etc.
2. Monthly statement of project budget
3. Visual record of physical impact of the programme (i.e. 20-40 slides).
4. Reporting of any travel, holiday or sickness leave.

APPENDIX B

PROGRAMME ACTIVITY SCHEDULE

	<u>Month</u>	<u>Activity</u>	<u>Activity Directed at</u>
PROJECT	-6	Project selection	
<u>PREPARATION</u>	-3	Recruit Project Co-ordinator	
	0	Professional Development I	Local Co-ordinator
<u>YEAR 1</u>	1	Organizational Analysis Creation of Residents Committee	Citizens
	2	Kick-Off Seminar - Inventory and Documentation	Citizens
	3	Defining the Heritage Product	Citizens
	4	Committee Review	Citizens
	6	Framework of Opportunity Networking Meeting	Citizens Local Co-ordinator
	7	Committee Review	Citizens
	9	Stake Building Event	Citizens
	10	Committee Review	Citizens
	12	Check-up and Refocus	Citizens
<u>YEAR 2</u>	13	Professional Development II Networking Meeting	Local Co-ordinator Local Co-ordinator
	14	Marketing Action Plan	Citizens
	15	Seminar - Product Development	Citizens
	18	Networking Meeting	Local Co-ordinator
	20	Seminar - Marketing	Citizens
	23	Check-up and Refocus	Citizens
	24	Networking Meeting	Local Co-ordinator
<u>YEAR 3</u>	27	Seminar - Tourism	Citizens
	30	Networking Meeting	Local Co-ordinator
	33	Seminar - Economic Development	Citizens
	36	Check-up and Refocus Project Evaluation Networking Meeting	Citizens Citizens Local Co-ordinator

APPENDIX C
DESCRIPTION OF PROGRAMME ACTIVITIES

1. Project Selection

A committee of provincial and federal agencies and Heritage Canada will select regions for inclusion in the programme.

2. Local Co-ordinator Selection

The Local Co-ordinator will be chosen by Heritage Canada after consultation with appropriate regional organizations.

3. Professional Development I and II

The Local Co-ordinator will be given personal instruction by Heritage Canada staff and other specialist in the basic skills he or she may need to deliver and operate the projects. The lessons will be designed to develop practical skills drawing on the working experience of our participants. The first session, with a duration of approximately two weeks will give the co-ordinator a clear understanding of the issues he or she will be confronting on site. The second session will deal with advanced techniques and skills needed to manage the project.

A personalized training programme is organized for each co-ordinator.

4. Kick-off

The official start of the project will include public ceremonies involving all participants of the project.

5. Organizational Overview

The organizational overview leads the way to creating the key Residents Committee. The activity is divided into two parts:

- a. Organizational Analysis - The Local Co-ordinator, the provincial partners, and representatives from local organizations and agencies will make an enumeration of the potential participants of the Residents Committee and will create and implement a plan of action.
- b. Creation of the Residents Committee - A meeting will be convened of the organizations and agencies in the region identified during the Organizational Analysis meeting in order to create the core of the Residents Committee and to give it a basic direction for the programme.

6. Defining the Heritage Product

At the beginning of the project, the Residents Committee and the Local Co-ordinator with the assistance of a consultant will identify the heritage themes and related resources and activities of the region in order to establish the "heritage context."

7. Opportunity Framework

The Residents Committee and Local Co-ordinator will use the heritage context to identify, with the assistance of consultant, a wide range of economic development opportunities.

8. Stake Building Event

The Residents Committee and the Local Co-ordinator, with consulting assistance where required, will choose directions from the Framework of Opportunity to develop objectives for the project and identify goals that the project will attempt to meet over the three years.

9. Committee Review

Much of the work of the Residents Committee will be done by sub-committees which will report regularly to the full committee with the results of their specific tasks.

10. Seminars

- a. Inventory and Documentation - Techniques for identifying, evaluating, and synthesizing all aspects of a region's community cultural identity.
- b. Product Development - Techniques for articulating and defining key characteristics of chosen themes. Identifying and implementing complementary development strategies.
- c. Marketing - Participants are taught skills for the promotion and selling of regional story and of the sites and activities developed under the programme.
- d. Tourism - The seminar will discuss methods of developing the region as an attractive tourism destination.
- e. Economic Development - Participants will learn the techniques and tools they will need to encourage the economic growth of the region.

11. Marketing Action Plan

After the community has had an opportunity to evaluate the report from the Community Priority Setting meetings, an action plan will need to be developed. The Marketing Action Plan will arrange for the major actors to decide on a strategy for implementing the process. The activity will take the form of a seminar with special emphasis on marketing the resulting work undertaken by the region.

12. Networking Meeting

On a regular basis regional or national meeting of project co-ordinators will occur in order that the co-ordinators are able to learn and share expertise and experience of the newest techniques in the field.

13. Check-up and Refocus

Once a year, the region and partners will have an opportunity to evaluate the project to ensure that goals, themes, and priorities are still relevant and to make changes to priorities and goals as necessary.

14. Project Evaluation

At the end of the programme, an evaluation of the project's work is completed in order to garner lessons which can be applied to other existing and to new projects.

APPENDIX D
PROJECT MILESTONES

<u>Approx. Month</u>	<u>Objective</u>
2	Creation of Residents Committee
10	Regional report of the direction, goals, and priorities of the project completed
15	Production of a marketing action plan
20	Directory of the regional attractions finished
24	Production of intra-regional promotional campaign
30	Development of regional tourism campaign
36	Creation of a plan to continue the process after the official end of Heritage Canada's involvement in the project

APPENDIX E

MILESTONES IN DEVELOPMENT OF PROJECT EVENTS
(Approximate Date Relative to the Selection
of the First Local Co-ordinator
Date of Selection = 0)

<u>Approx. Month</u>	<u>Objective</u>
4	Planning for First Professional Development programme completed
6	Organizational Analysis process completed
7	Seminar - Inventory and Development prepared
8	Defining the Heritage Project process completed
9	Structure for Committee Reviews completed
11	Framework of opportunity process completed
14	Stake Building event process completed
17	Format of Check-up and Refocus prepared
18	Second Professional Development programme completed
19	Marketing Action Plan programme co-mpleted
20	Seminar - Product Development prepared
25	Seminar - Marketing organized
32	Seminar - Tourism organized
38	Seminar - Economic Development organized

APPENDIX F

MILESTONES IN DEVELOPMENT AND MANAGEMENT
OF REGIONAL HERITAGE TOURISM STRATEGY

Approx. Month	Objective	Project
9/87	Funding for <i>Regional Heritage Tourism Strategy</i> in place	
11/87	Selection of first demonstration project completed	1
1/88	Selection of first Local Co-ordinator completed	1
2/88	Development of promotional strategy completed	
4/88	Kick-Off: Official start of first project	1
5/88	Selection of second demonstration project completed	2
6/88	Selection of second Local Co-ordinator completed	2
7/88	Selection of third demonstration project completed	3
8/88	Selection of third Local Co-ordinator completed	3
8/88	Kick-Off: Official start of second project	2
8/88	Format of Networking Meeting developed	
9/88	First Networking Meeting	
10/88	Kick-Off: Official start of third project	3
3/89	Second Networking Meeting	
9/89	Third Networking Meeting	
3/90	Fourth Networking Meeting	
9/90	Fifth Networking Meeting	
2/91	Planning of Project Evaluation process completed	
3/91	Sixth Networking Meeting	
3/91	Evaluation of first project completed	
7/91	Evaluation of second project completed	
8/91	Seventh Networking Meeting	
9/91	Evaluation of third project completed	
2/92	Administrative details arising from demonstration projects settled	
5/92	Products arising from demonstration projects available for sale	
8/92	Evaluation of <i>Regional Heritage Tourism Strategy</i> completed	

APPENDIX G

ECONOMIC IMPACT OF REGIONAL HERITAGE TOURISM STRATEGY*

I. NATIONAL TRAVEL VOLUMES (Total visits, one night or more)

	<u>Number</u>	<u>Receipts</u>
Foreign	13,745,000	\$5,006,000,000
Domestic	52,480,000	\$14,937,000,000
Total	<u>66,225,000 (1)</u>	<u>\$19,943,000,000 (2)</u>

II. NATIONAL IMPACT OF TOURISM

	<u>Direct Impact</u>	<u>Indirect Impact</u>	<u>Total</u>
Income	\$13,424,000,000	\$22,450,000,000	\$35,874,000,000 (4)
Government Revenues	\$4,629,000,000 (Prov. + Munic.)	\$4,398,000,000 (Fed.)	\$9,027,000,000 (5)
Investment	<u>\$3,158,000,000 (6)</u>
			%8,059,000,000 =====
Jobs (person-years)	590,000	529,000	1,119,000 (3)

III. IMPACT OF REGIONAL HERITAGE TOURISM STRATEGY

A typical Main Street project returns approximately \$14 for every \$1 of programme money invested. To take into account the Local Co-ordinator's smaller emphasis on working with building- and property owners, the following calculations for construction are discounted by 75% so that \$1 of investment is shown to have only a very conservative multiplier effect of .5350. On the basis of the above national statistics and the Main Street experience, an increase of visits per year due to the Regional Heritage Tourism Strategy would have the following impact:

	<u>Additional Visits per year:</u>				<u>Calculations</u>
	2000	5000	10000	20000	
A. Economic Impact					
Tourism Receipts	\$602,290	\$1,505,700	\$3,011,401	\$6,022,801	(2) / (1) * NO. OF VISITS
Income (Dir. + Ind.)	\$1,083,398	\$2,708,494	\$5,416,988	\$10,833,975	(4) / (1) * NO. OF VISITS
Government Revenues	\$272,616	\$681,540	\$1,363,080	\$2,726,161	(5) / (1) * NO. OF VISITS
Investment	\$95,372	\$238,430	\$476,859	\$953,718	(6) / (1) * NO. OF VISITS
Construction	2,345,530	2,345,530	2,345,530	2,345,530	
Total	<u>\$4,399,195</u>	<u>\$7,479,694</u>	<u>\$12,613,857</u>	<u>\$22,882,185</u>	
B. Jobs Created					
	34	84	169	338	(3) / (1) * NO. OF VISITS

* Based on Tourism Canada publication "1987 Tourism Impact - The Facts" and Heritage Canada Main Street project evaluations