

**Arctic Development
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**Baffin Region - Tourism Industry Overview
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BAFFIN REGION

TOURISM INDUSTRY

OVERVIEW

1995

Government of the Northwest Territories
Department of Economic Development & Tourism
Tourism & Parks Division, Baffin Region.
November 1995

**SUMMARY OF
REGIONAL TOURISM INDICATORS
BAFFIN 1995**

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Tours
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 - 4.2** Visitor Surveys - Visitor Centres.

1.0 TERRITORIAL AND REGIONAL TRENDS - 1995

- **28 Outfitters were licensed to operate in the Baffin Region in 1995, five of these had their business base outside of the Northwest Territories, and with one exception all ex-Territorial companies operated tours exclusively in the high arctic.**
- **With the exception of Sanikiluaq, all communities had one or more outfitting business offering services.**
- **For the first time since packaged tour records have been retained, revenues generated from sports-hunting were higher than any other sector of the industry. Total sales from Sports hunting was \$ 995,000, and a 37.7% increase over 1994.**
- **The second highest generator of industry income was from naturalist tours, for a total of \$ 883,688. In 1994, naturalist tours were the primary generator of tourism revenue.**
- **Over the past three years gross revenues have grown by an average of 7.5% per year. Extending this growth rate into the 1996 season, it conceivable the region can expect revenues from package tours to be \$ 2,800,000.**
- **Since 1989/90 the sale of Northwest Territories sports fishing licenses has steadily decreased by 5.5% per year.**

2.0 NATIONAL AND INTERNATIONAL TRENDS

- The Adventure Travel Society's most recent report of the National origin of adventure travelers to Canada are as follows,

Canada	56%
U.S.A.	23.1%
Germany	8.4%
France	4.4%
United Kingdom	2.5%
Japan	2%
Other Countries	3.6%

As adventure/Naturalist/Cultural travel is the region's prime attraction, it is important to take note where Canada's, subsequently the Northwest Territories clients originate. These facts should be considered when planning your marketing strategy.

- The Canadian economy is expected to rebound in 1996 by approximately 3%, however there currently exists some economic uncertainty, subsequently, operators can expect a good year from the domestic market, although volumes may not be as high as anticipated. (Canadian Tourism research Institute)
- Canadian travellers have been and continue to be the main tourist market for travel in Canada. Three Canadian out of ten who travelled at least once during the year in other provinces were from Ontario. Ontario was the only province of origin that registered more than one million interprovincial travellers. (Statistics Canada)
- Based on the first five months of 1995, it appears that Canada will experience an even better year than last year in terms of inbound travel. Nationally, Canada can expect that pleasure trips will increase by 4% in the Summer of 1996. (Canadian Tourism research Institute)
- The Canadian Tourism Commission has decided to allocate 80% of its marketing budget and activities directed to consumers in the European markets of the United Kingdom, Germany and France. The customer segments targeted are,
 - * the 25 to 44 year old culture and nature group,
 - * the 25 to 44 year old sports and outdoor customer segment,
 - * the culture and comfort segment, age 45 and older.
- The growth of destination data on on-line services appears destined to make them a dominant source for travel planning, and eventually direct booking.

3.0 MARKETING AND PROMOTION

- **Familiarization and Media tours.** Value of media tours are based on the accepted industry conversion rate used to determine the value of a published article is to multiply the cost of a similar size advertisement by 3. For example, if a full page ad costs \$ 10,000., the value of the article is \$ 30,000.

Fam and Media Tours - Baffin Region 1995/96

1. Media Tours

Media Representative Journal Affiliation	Product	Community Outfitter	Date(s) of Tour	Dept. Support	Results	Estimated Value
Stuart Wavell The Sunday Times 1 Pennington St., London, E1 9XW U.K.	Newspaper Feature	Resolute Bay Arctic Bay Arctic Watch & Niglasuk Co.	June 8 to June 23	\$1,815 Outfitter costs	Feature article on Arctic Watch camp & Floe edge tours	\$18,000
Margo Pheiff 229 Kinsington Ave., Westmount, Que. H3Z 2G9 Tel. (514) 932-4371	Various newspapers Magazines	Broughton Island Pangnirtung Pikaluk Outfitting	Aug. 11 to Aug. 23	\$1,767 Outfitters Air fare (50%)	Feature Articles in Montreal Gazette and Readers Digest.	\$15,000
Larry Millman P. O. Box 1582 Cambridge, MA USA 02238 Tel. (617) 492-5861 Fax.(617) 492-6322	Newspaper Magazines	Igloolik and Lake Harbour HTA & Akavak Outfitter	Aug. 14 to Aug. 30	\$4,000 Outfiiter, airfare (50%) accomodation	Feature Articles in Boston Herald and Islands magazine	\$25,000
Almadon Productions Inc. 1284 Wellington St. Ottawa, Ont. Tel. (613) 722-6155 Fax.(613) 722-0272	2 x 30 min T.V. episodes	Iqaluit & Pangnirtung Northwinds &	Sept. 18 to Spt. 23	\$10,000 Airfare, accom. outfitter costs	2 half hour travel shows CTC sponsored, "Travels With Mom" Canada-wide for families. Brochure also, will include code for tracking.	\$50,000
Carlos Fucikovsky C/O Canada North Outfitting Almonte, Ont.	Various media in Spain	Lake Harbour Mayuklik HTA	Sept.	\$1,200 Outfitter fees	Newspaper and magazine articles in Spanish market	\$10,000

Media Representative Journal Affiliation	Product	Community Outfitter	Date(s) of Tour	Dept. Support	Results	Estimated Value
Tri-Star Pictures/Nat. Geograph 10202 W. Washington Blvd. Culver City, California Tel. (213) 280-8000 Contacts: Brian McNulty, Tri-Star Christine Harper, National Geographic	Feature Film	Iqaluit & Pangnirtung	Aug. 27 & 28th	\$2,000 Aircraft Charter	Feature film with budget of 65 million. Scheduled to begin production May 1996	Potential of 8 to 12 for local e

Total estimated value 118,000*

* Not included in the balance is projected revenues from production of feature film.

2. Familiarization Tours - Baffin Region, 1995/96

Representative's Name Wholesaler/Retailer	Product	Community Outfitter	Dates of Tour	Dept. Support	Results	Estimated Value
Kerstin Sutherland Northern Spirit Adventures Tours, P. O. Box 260, Braeside, Ont. K0A 1G0	Naturalist Adventure Packages	Arctic Bay Niglasuk Co. First Air	June 8 to June 13th	50% of airfare Outfitter \$3,218	Potential of 2 tours of 12 clients each from Germany	\$72,000
Interp. & Outdoor Expeditions Calgary Zoo, Calgary, Alberta 2 agents	Naturalist Ecotours	Resolute Bay Cunningham Inlet Jessco Operations	July/Aug	\$5,000 Air charters Accom. &	1 tour of 20 clients begining in 1996 through to 2000	\$120,000
Seaworld of Florida Education, Research & PR Wild Arctic Theme Park Orlando, Florida 3 agents.	Naturalist Also media tour Ecotours	Resolute Bay Cunningham Inlet Jessco Operations	July/Aug/	\$7,500 Air charters Accom. and outfitter fees	1 tour of 20 clients in 1996 1 tour of 40 clients 1997 - 2000	120,000 960,000
Japan Travel Corp. Canadian Airlines Kazutaka, Nagato 2 agents	Naturalist Ecotours	Resolute Bay Cunningham Inlet Jessco Operations	July/Aug.	\$5,000 Air charter Accom. and outfitter fees	1 tour of 10 clients in 1996 1 tour of 20 clients in 1997 2 tours of 40 clients in 1998 4 tours of 40 clients in 1999 8 tours of 40 clients in 2000	60,000 240,000 480,000 960,000 1,920,000
Lands End Clothing/Catalogue Customer Relations & Tours 4 agents	Naturalist Ecotours Media tour Special clothing line	Resolute Bay Cunningham Inlet Jessco Operations	July/Aug.	\$10,000 Air charters Accom. and Outfitter fees	1 tour of 10 clients in 1996 1 tour of 20 clients in 1997 1 tour of 40 clients in 1998 1 tour of 40 clients in 1999 1 tour of 40 clients in 2000	60,000 120,000 240,000 240,000

Representatives Name Wholesaler/Retailer	Product	Community Outfitter	Date(s)	Dept. Support	Results	Estimated Value
Canada Network Inc. Mr. Yataro Hayashi 1-3-6 Toranomen Ninato-ku Tokyo, Japan 105	Adventure tours	Iqaluit and Pond Inlet Eclipse Snd. Outfitting	Sept. 15 to Sept. 2	3,104 Accom. & airfare	Projected at least 1 tour of 14 clients to Pond Inlet and 1 group to Iqaluit	56,000
						42,000
Total estimated value projected for 1996						\$530,000
Total estimated value projected for 1997 to 2000						4,650,000

4.0 RESEARCH AND EVALUATION

4.1 Package Tour Survey and Analysis

4.2 Visitor Surveys - Visitor Centres

PACKAGE TOUR SURVEY - 1995

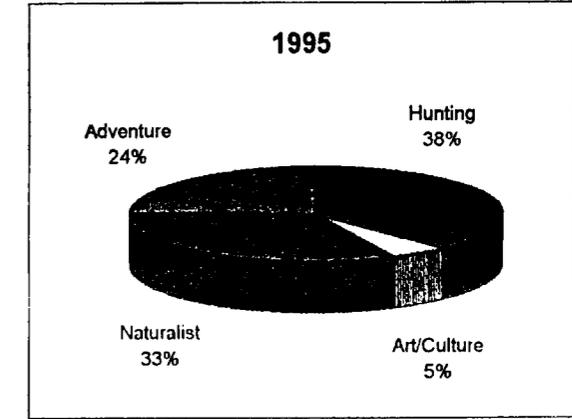
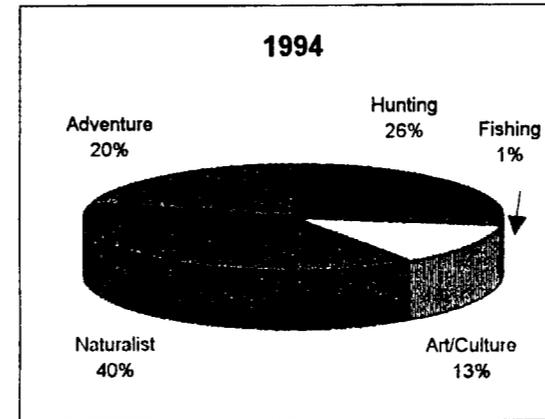
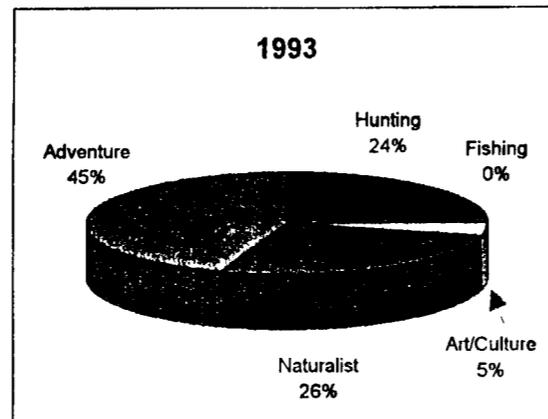
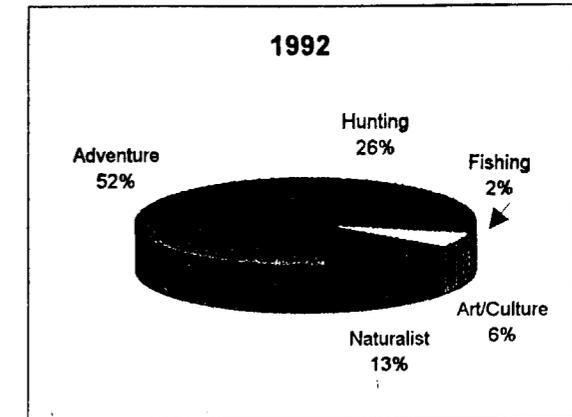
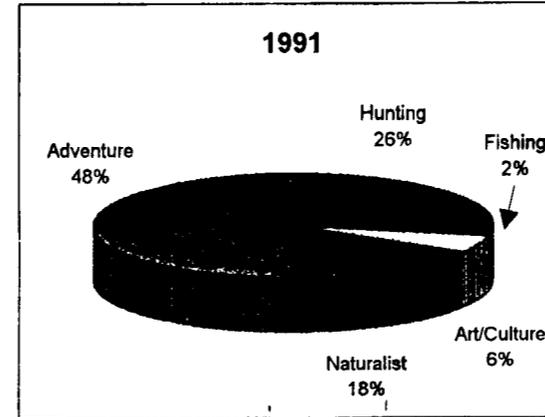
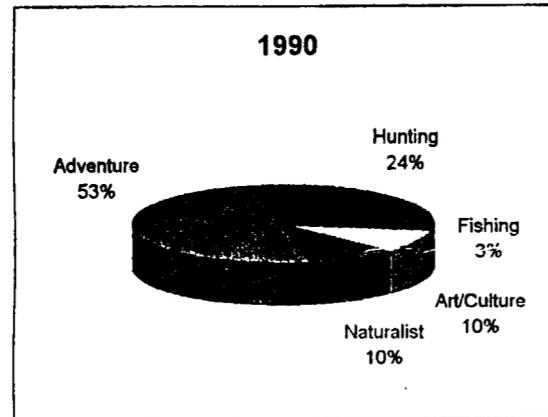
TYPE OF TOUR	NUMBER OF CLIENTS	GROSS RECEIPTS	
		1995	1994
Adventure	802	646,496	479,985
Naturalist	680	883,688	919,746
Arts/Culture	400	135,230	304,325
Hunting	79	995,000	619,505
Fishing	0	0	29,666
TOTAL	1961 (1)	2,660,414	2,353,299

(1) Total includes some clients who purchased tours that include more than one tour category. Actual total of clients is 1,311

(2) 12% increase in 1995 over 1994 receipts.

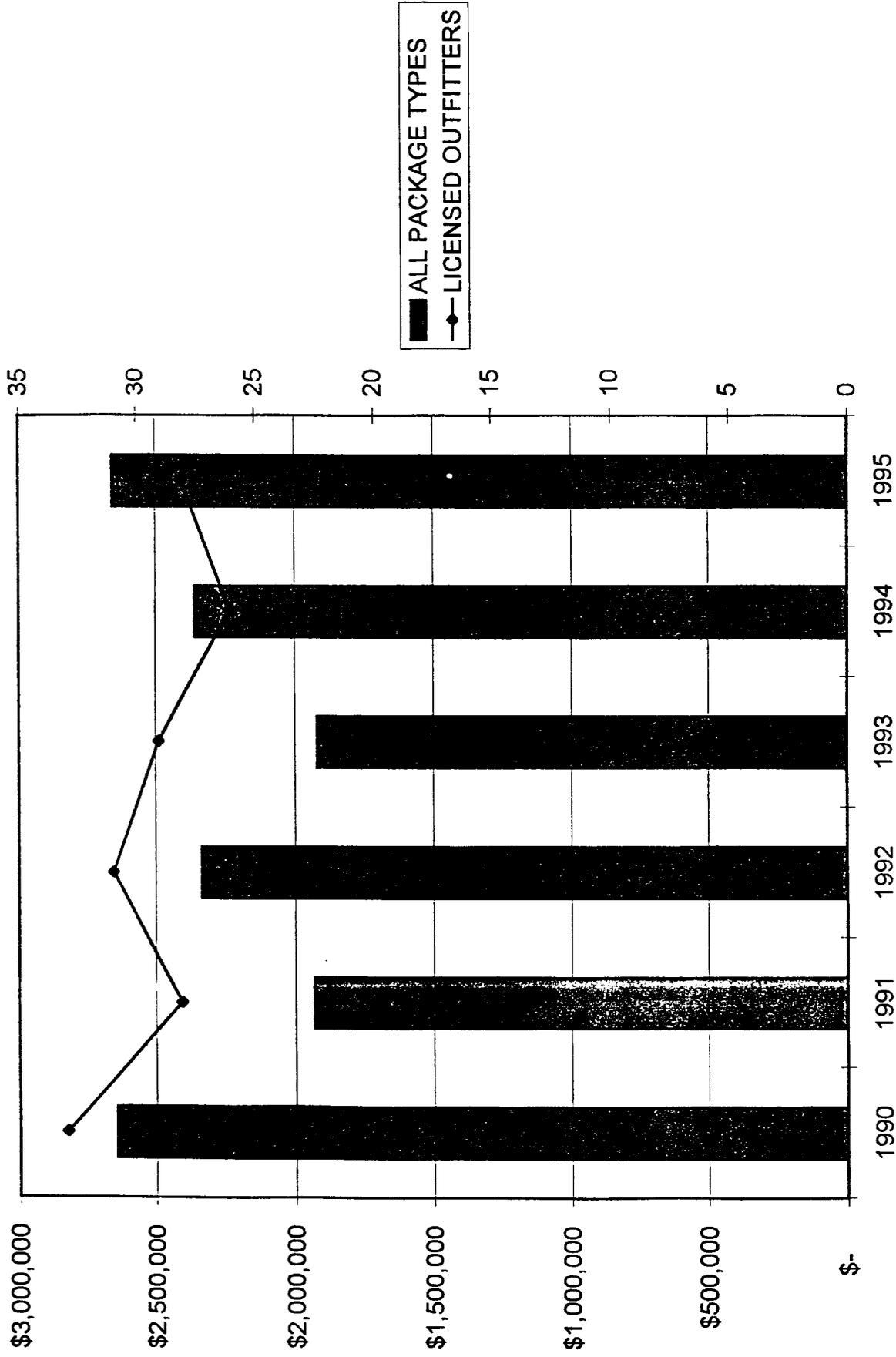
Breakdown of Hunts for Polar Bear Canada North Outfitting	Arctic Bay	6
	Hall Beach	2
	Iqaluit	6
	Igloolik	6
	Clyde River	7
	Lake Harbo	1
	Broughton I Island	2

PACKAGE TOUR ANALYSIS
 'Type' Share of Total Revenue, Baffin Region 1990 - 1995



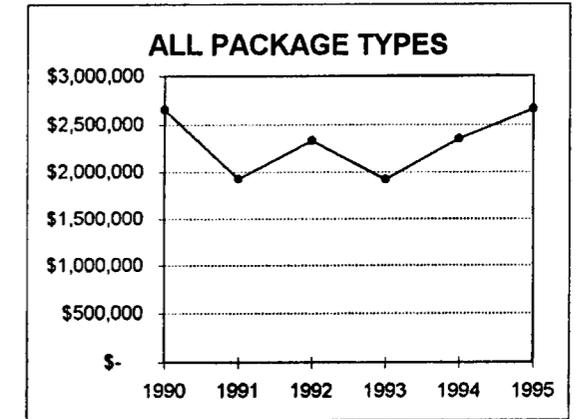
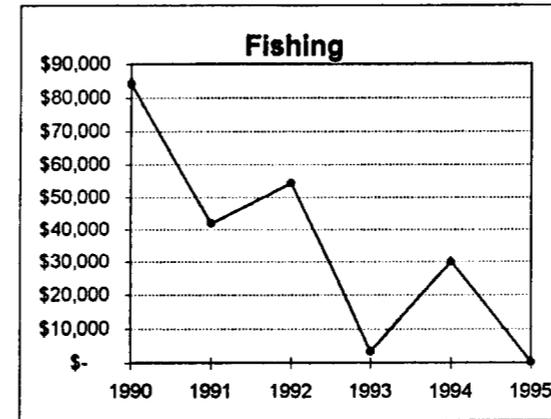
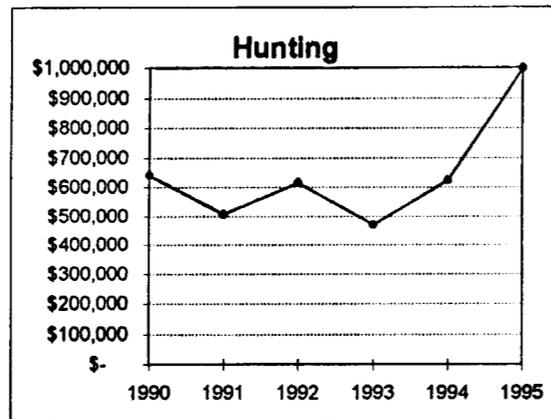
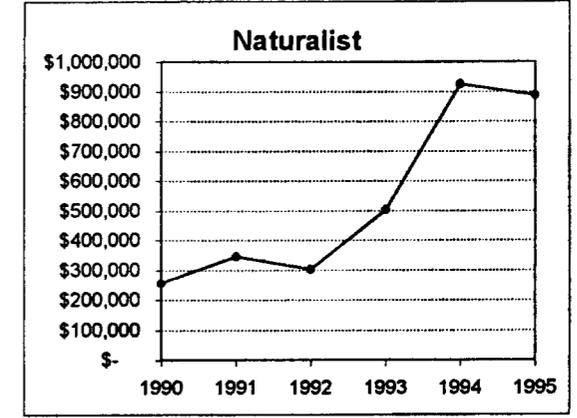
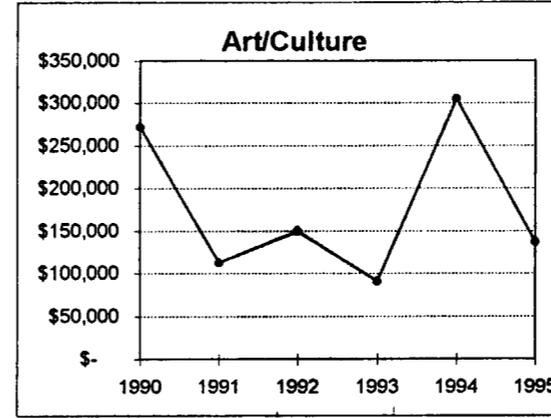
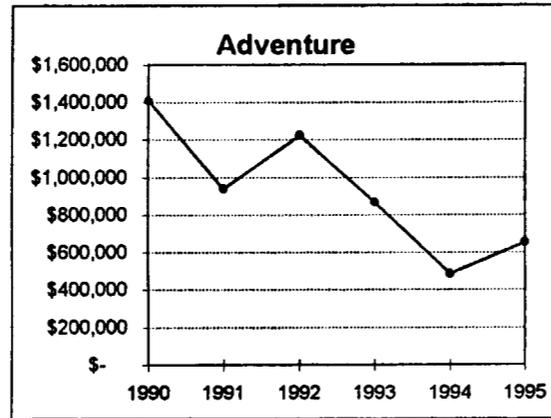
PACKAGE TOUR ANALYSIS

Total Package Tour Revenue vs. Licensed Outfitters Baffin Region, 1990 - 1995



Source: Economic Development Tourism, Tourism Division

PACKAGE TOUR ANALYSIS
 Revenue by Package Type, Baffin Region 1990 - 1995



Package Tour Survey - 1995 - Community Distribution

Community	No. of Tourists	Value Gross	'1994		Change
			No. of Tourists	Value Gross	
Iqaluit	503	206,195	447	189,325	16,870
Pangnirtung	209	113,413	155	180,052	-66,639
Broughton Island	143	435,600	133	247,300	188,300
Clyde River	21	120,425	45	97,000	23,425
Pond Inlet	202	95,635	55	109,637	-14,002
Arctic Bay	16	123,500	95	252,100	-128,600
Grise Fiord	29	276,800	50	108,000	168,800
Resolute Bay	341	985,010	395	954,550	30,460
Igloolik	7	98,000	7	98,000	0
Hall Beach	2	28,000	0	0	28,000
Cape Dorset	112	113,510	115	78,555	34,955
Lake Harbour	164	114,921	156	136,709	-21,788
Totals	1749	2,711,009	1653	2,451,228	259,781

Community Distribution by Activity/Revenue - Package Tour Survey 1995

Community	Hunting	Naturalist	Adventur	Cultural	Arts/Crafts	
Iqaluit	28,000	47,587	88,504	42,113	0	
Pangnirtung	0	845	97,129	13,754	1685	
Broughton Island	28,000	200,866	200,866	5,866	0	
Clyde River	105,000	700	13,425	1,300	0	
Pond Inlet	0	54,550	17,050	24,035	0	
Arctic Bay	84,000	19,750	19,750	0	0	
Grise Fiord	246,000	0	15,400	15,400	0	
Resolute Bay	231,000	440,596	86,996	81,746	0	
N. Pole/Ellesmere	0	19,200	125,470	0	0	
Igloolik	98,000	0	0	0	0	
Hall Beach	28,000	0	0	0	0	
Cape Dorset	0	55,980	55,980	1,550	0	
Lake Harbour	58,000	7,175	44,441	5,300	0	
Totals	906,000	847,249	765,011	191,064	1685	2,711,009

4.2 Visitor Surveys - Visitor Centres

Angmarlik Centre Pangnirtung

4.2 Visitor Surveys - Angmarlik Centre, Pangnirtung.

Responses from Questionnaires administered at the visitor centre.

Gender of Respondents

Females	112	Males	53
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Number of people from Countries listed below:

France	5	Switzerland	2	
U.S.A.	28	Germany	10	
Australia	4	England	22	
Spain	3	Canada	91	<u>Total 165</u>

Age Groups:

Under 16	6	16 to 25	38	
26 to 35	60	36 to 45	25	
46 to 55	26	56 and over	10	<u>Total 165</u>

Activities Tourists participated in:

Hiking	41	Boat Trips	9	
Mountaineering	15	Char Fishing	5	
Community Tours	8	Sports fishing	3	
Research	1	Photography	25	
		Other activities	11	<u>Total 165</u>

How Tourists became aware of Pangnirtung:

Brochures	12	Magazines	13	
Airlines	2	Travel Agents	3	
		Others	32	<u>Total 62</u>

**Angmarlik Visitor Centre
1994 Visitor's Countsheet**

Month	Visitor's to the NWT		Residents of the NWT		Total Visitors	
	1994	1995	1994	1995	1994	1995
January 9 - 31	8	8	467	166	475	174
February 1 - 28	15	28	719	276	734	304
March 1 - 31	30	22	485	168	515	190
April 1 - 30	45	52	375	195	420	247
May 1 - 31	95	65	538	275	633	340
June 1 - 30	153	192	808	590	961	782
July 1 - 31	898	551	1397	1,269	2295	1,820
August 1 -31	905	585	1272	1,004	2177	1,589
September 1 - 30	27	209	329	295	356	504
October 1- 31	13	no count	398	No count	411	No count
November 1 - 30	17	" "	317	" "	334	" "
December 1 - 31	25	" "	213	" "	238	" "
Totals	2231	1,712	7318	4,238	9549	5,950

UNIKKAARVIK
VISITOR CENTRE
VISITOR COUNTS

Unikkaarvik Guest Register Counts - 1995

<u>LOCATION</u>	<u>COUNT</u>	<u>LOCATION</u>	<u>COUNT</u>
British Columbia	50	United Kingdom	6
Alberta	45	France	15
Saskatchewan	12	Italy	4
Manitoba	20	Germany	21
Ontario	173	Spain	3
Quebec	90	Belgium	1
New Bruswick	10	Finland	1
Nova Scotia	25	Switzerland	3
Prince Edward Isl.	2	Denmark	1
Newfoundland	21	Greenland	15
NWT	110	Poland	1
TOTAL CANADA	558	Netherlands	1
Japan	2	Russia	3
Thailand	1	Czechoslovakia	1
TOTAL ASIA	3	TOTAL EUROPE	76

Arkansas	9	California	7	
Colorado	3	Delaware	2	
District of Columbia	2	Florida	2	
Georgia	5	Maine	4	
Maryland	2	Massachusetts	4	
Michigan	2	New Hampshire	3	
New York	5	North Carolina	1	
Ohio	2			
TOTAL UNITED STATES	63	Canada	558	78.5%
		Europe	76	10.7%
New Zealand	1	Asia	5	3%
Mexico	7	USA	63	8.8%
Brazil	2	Other	10	1%
Israel	2			
TOTAL OTHER	12			

Unikkaarvik Visitors' Center
Parks and Visitors' Services
Iqaluit, N.W.T.

Visitors' Tally : from 01/01/95 to 04/15/95

The total number of visitors to N.W.T. = 524

The total number of residents from N.W.T. = 707

Total number of visitors to Unikkaarvik = 1231

The figures are from the tally sheets kept at the Visitors' Center,
which are done on a daily basis.

The figures pick up considerably during spring and summer months.
(please note that these are for the winter months.)

✓ 5 5-11-95

Annie Ango'yuaq
Assistant Manager