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Arctic Coast Destination Zone - Tourism Development & Marketing Strategy - Background Report Tourism, Tourism - Arctic Coast Region

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Arctic Coast Destination-Zone

Tourism Development and Marketing Strategy

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Background Report

Arctic Coast Tourist Association

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1. INTRODUCTION

1.1 A REGIONAL OVERVIEW

The Northwest Territories Arctic Coast Region provides one of the most distinctive and memorable landscapes in the world. Its 500,000 sq. kms, rival any area of the globe for its wilderness beauty and provides an exotic destination to those tourists seeking an exclusive and original travel experience.

While the natural resources reveal a mosaic of massive rockscapes, tundra, and countless lakes, the communities provide a traditional Inuit lifestyle that is responsive to a northern environment and is internationally famous for its arts, craft and culture.

Typical travelers to the Central Arctic include anglers and hunters, naturalists, history enthusiasts, government officials and business people. Their activities may be as varied as their interests in the Arctic environment. For the visitor, community tours, fishing and hunting expeditions, hiking, canoeing and browsing for crafts can frequently provide several days of activity in each community. Package tours may include the exploration of the historic resources by boat, dog sled or snow machine. As well, char fishing, visits to the co-op craft outlets and entertainment by local musicians and athletes are available and will become an increasingly important component in future community-based tourism.

1.2 COMMUNITY-BASED STRATEGY

The Government of the Northwest Territories has made a bold and unique attempt to establish community-based tourism. “Our new products programs center on community package tours and their components, such as community trails and visits to residents homes, with continuing efforts in planning and community, beautification(l). The communitities can therefore be considered as a source of attractions and events as well as a service focus for those activities taking place beyond the community area. For example, while individual and even multi-community package tours may be organized into isolated natural and archeological sites, the visitors would pass through the pertinent communities for their basic services (guides, transportation, food, etc.). It is evident that the communities do have "the basic plant and resources to cater to tourists, and the potential attractions(2)" which could hold the tourist in the community for longer periods of time. The emphasis must, therefore, be on developing the communities' natural, historic and human resources for the social and economic benefit of the Kitikmeot Region.

1.3 THE REGIONAL TOURISM STRATEGY

"Tourism provides employment and entrepreneurial opportunities--and when compared to other existing and potential industries (fishing mining, oil/gas) tourism offers the greatest growth factor in the long term(3). The Arctic Coast Tourist Association recognized the tourism development opportunities in their region and their potential impact on the level of jobs and revenue. As well, the association has identified the need to protect and preserve local native culture while at the same time developing management and hospitality skills, as well as establishing a marketing strategy for the region. The development strategy consists of two documents: this Background Report as well as a Master Plan and Implementation Strategy. The Background Report provides the inventory and analysis of both the tourism resources and travel markets, the results of the extensive interviews with many leaders (see appendix) within the various communities, a synthesis of all the collected data, and a review of potential development opportunities and constraints.

The analysis of the natural and cultural resources and the existing and potential markets have enabled the identification of a series of development issues and trends. This report concludes with the presentation of alternative development concepts and a preliminary selection of potential development opportunities.

1.4 EXISTING TOURISM DEVELOPMENT

It is important to realize before preparing a master plan, for the Arctic Coast, that tourism is relatively unknown to the region's people. There are only a few individuals who have an understanding of the basics of the travel industry and for the most part that has been gained through job related experience. Neither government officials nor the handful of individuals who have started the few operations have had much contact with other components of the travel trade. Only one supplier, Bathurst Inlet Lodge, has a reputation for on-going marketing, continual quality service and imaginative product development. For the most part however, the present operators are new to the industry, relatively inexperienced, are working with a tourism product that is almost completely nature-based (i.e. very few man-made attractions) and are involved with an Inuit population that has had little exposure to southern tourists; yet the Inuit culture is one of the main attractions to the region.

"The essential ingredient of tourism is its exoticism, what the French call depaysement. The tourist seeks an experience that cannot be duplicated in his ordinary place of residence(4). Travel amongst the Inuit cultures is both exotic and authentic allowing the northern tourists to truly leave their customary environment and cross the boundaries of their social world. However this type of "ethnic" tourism creates special issues for both the guest and the host. Not only must the hosts preserve their authenticity but the guests must interact with the local people in such a way as to avoid what is called "the Heisenberg effect" which suggests that the search for the exotic is self-defeating because of the overwhelming influence of the observer on the, observed. Therefore, while the northern tourist may want to see the "unspoiled native", their very presence transforms the authenticity of the experience.

The development of the travel industry and the emergence of a continuous host (northern) - guest (southern) interaction, then, is in its formative stages in the Arctic Coast Region. The Regional Tourism Strategy must reflect these realities and provide an orientation that is positive and constructive for both.

During the first series of visits to each community the key actors, including members of the local tourism communities, community leaders, politicians, and travel-related businesses were interviewed(5). The purpose of this dialogue was to identify their attitudes toward the existing travel industry, as well as to determine their perceptions of the future of tourism in the region. As well, the available market data was assessed and all relevant suppliers of northern tour packages were subjected to in-depth interviews. Although much of the physical resource data was collected during the spring season it was continually upgraded by subsequent visits in the summer and winter, thus providing a year-round perspective on the region.

REFERENCES

(1) "Community Based Tourism - Summary Report", Government of the Northwest Territories, June 1983.

(2) Ibid.

(3) Tourism Development and Marketing Strategies for the Northwest Territories - Vol. 1. The tourism Steering Committee, Yellowknife, May 1980.

(4) "Tourism and Re-created Ethnicity"; Annals of Tourism Research; van den Berghe, Peter, Keyes, Charles, Pergammon Press, New York, 1984.

(5) See Appendix for lists of interviewed.

2. GOALS AND OBJECTIVES

The following broad goals and objectives for tourism development have been noted during the first phases of the planning process. They are economic, cultural and environmental in nature. They will be followed by more detailed goals and objectives at the Master Plan level.

2.1 ECONOMIC GOALS

To increase the economic potential and employment opportunities for citizens by creating added income and additional jobs.

To diversify the economic base of the region's industry which is largely dependent upon government related jobs and programs as well as trapping, fishing and hunting.

To provide opportunities for the private sector to contribute to the travel industry.

To extend the length and impact of the tourist seasons.

To identify and locate community-based attractions and services that support the tourism development of the region.

To identify the tourism development opportunities which could strengthen and diversify the economic base of the various communities.

To create a spirit of collaboration and coordination among the various communities and their tour operators in order to establish a strong, integrated regional tourism product.

To identify possible areas for government financial assistance.

2.2 CULTURAL GOALS

- To protect enhance and restore the cultural heritage of the Inuit people.
- To ensure development that is in keeping with the aspirations of the residents of the Arctic Coast.

- To develop a greater awareness of local history and heritage.
- To increase recreational facilities and opportunities for residents.

2.3 ENVIRONMENTAL GOALS

- To create an awareness of the unique character and the natural attractions of the Arctic environment.
- To identify those areas that are especially environmentally sensitive and recommend the necessary legislation to protect and preserve them.
- To recognize those environmental features of the Arctic that have a particular interest to the naturalist and assure. their protection from over use as well as preserve them for future travelers.

3. NATURAL RESOURCES

3.1 OVERVIEW

The natural resources are presently the most important attraction in the Arctic Coast Region. Tourists are drawn by the abundance of Arctic char and trout, seals, caribou and muskox, approximately 90 birds(1) species including the impressive gyrfalcon, whistling swan, and golden falcons, as well as dozens of seabirds. Hunters, anglers and nature enthusiasts, therefore come to this region to experience these unique resources.

The Arctic landscape is also the setting for a mosaic of natural features. Nationally famous rivers such as the Coppermine, Burnside Back, and Tree attract both anglers and canoeists. For the naturalists and photographers, the tundra provides an abundance of wildlife and colour. The tundra also interests the rockhound with its variety of minerals, minerals such as copper and develops awareness of the regions existing mineral potential as well as its history.

Finally the Arctic Ocean itself is a haunting and appealing water system consisting of tens of thousands of kilometers of frequently indented coastline and hundreds of islands, some of them larger than certain countries.

As one of the three oceans making up the Canadian Coast it has unquestionable appeal and can draw tourists for its mere existence as well as the natural resources it provides.

3.2 PHYSIOLOGY AND GEOLOGY

Much of the study region is made up of the very old Canadian precambrian shield. Major elevations in topography can be found created by scarp formations which are particularly noticeable around Coppermine.

The Coppermine area, particularly around the Tree River, consists of contoured sedimentary rock and between there and Bathurst Inlet the bedrock is granite. The highland cliffs at Bathurst Inlet also form part of this scarpland topography. Beyond Umingmaktok (Bay Chime) the land is low and poorly drained.

Much of Victoria Island, including the Cambridge Bay Area is flat-lying lower Paleozoic rock and this low, slightly undulating, yet rather montonous landscape extends to the east as far as Gjoa Haven.

The only major variation in the Victoria Island landscape can be found in the vicinity of Holman as a result of the Holman Island Syncline where a number of scarps developed on what are primarily diabased intrusive.

Generally, rock and rock formations dominate the Arctic landscape either as rock uplands or as plains of Pleistocene glacial deposits.

3.3 VEGETATION

Almost the entire region is above treeline and all major gradations of tundra occur in the region. While only the southern part of the region is covered in boreal forest, consisting mostly of white spruce, the tree cover does move north, along the Coppermine River Valley to within 25 miles of the community of Coppermine. Certain sheltered areas in the southern part of the region may produce dwarf willow stands of at least 1 meter (3' - 4') high. They can be found at the mouth of the Richardson and Rae Rivers, just west of Coppermine. Tall willow stands have also been located at the head of Minto Inlet, north of Holman.

The tundra is an area of continuous permafrost supporting grasses, lichens, mosses and shrub willows and interspersed with numerous bogs .

In the area of glacial plains, grasses and flowers such as Arctic Poppy and Arctic dandelion can be found amongst the rocks. In the rocky uplands ground birch and Labrador tea can be found and Arctic ferns and lichens grow where there is little soil.

For the most part the region is an arid wasteland with little vegetation and dominated by the rock formations around Holman, Coppermine, Pelly Bay and the Boothia Peninsula.

3.4 WILDLIFE (TERRESTRIAL, AQUATIC)

3.4.1 Fur bearers

- Overview

The role of furbearers as an attraction to the arctic regions is a controversial issue for local natives, conservationists and non-hunters. This is largely as a result of the impact of human activity, as well as the loss of many of the game reserves that existed before World War II.

The Barren Ground Caribou, for instance have numbered an estimated 2.4 million animals (prior to 1700), but have been diminished to approximately 500,000. McTaggart noted in 1981 that "each herd has been experiencing a human kill exceeding its renewal rate in addition to a substantial loss to wolves(2). Although there have been similar declines in the Muskox population it has more than doubled between 1965 and 1977. Yet it is suggested by Gray that "for certain populations (of furbearers), survival may be precarious(3)".

It is clear that sport hunting must be put into the perspective of the sensitivity of these populations and only through successful wildlife education and resource management will there be adequate levels of stock for local natives, naturalists, photographers and hunters.

3.4.1.1 Polar Bear

The magnificent Polar Bear is the largest of the land mammals and is sought as much by photographers and naturalists as by biq game hunters and locals. They roam most of the region in the winter but can only be found on the northern parts of the high arctic islands during the summer where they frequent the edge of the arctic ice pack in search of seals, walrus, and fish. While their pelts fetch as much as $1,500, their major economic value is as a big game trophy. Polar Bear hunts, costing as much as $20,000, are available in Holman while Pelly Bay and Gjoa Haven are considering using their tags for sports hunting. However only the latter has the necessary number of dog teams. Hunting of these animals is strictly controlled and the population is stable if not slightly increasing. Because the bear is a marine mammal its hide cannot legally be shipped to the United States, which has a certain impact on its desirability as a trophy.

3.4.1.2 Muskox

One of the nest curious animals in the NWT and in fact the entire North American continent is the muskox. As a relic of the ice age this shaggy prehistoric-looking beast is popular with photographers and hunters. They are found throughout the tundra region and can frequently be seen close to such communities as Cambridge Bay, Bathurst Inlet, Holman and Gjoa Haven.

Recent observations would suggest that the population is rapidly rising (from 8900 in 1965 to 19,000 in 1977) and the number of tags have recently been doubled for Holman (from 20 to 40).

3.4.1.3 Caribou

Caribou are a primitive deer found throughout the arctic in large herds usually migrating between summer tundra ranges and the forested winter feeding areas. A number of herds migrate within the region including the Bathurst Barren-Ground caribou herd, the largest in Canada, estimated by Cowan to be 100,000 in 1981. The herd can be seen at Bathurst Inlet where they pass in late May or early June on their way to the calving grounds east of the Inlet. This is one of the largest of the 5 herds of Barren Ground Caribou and it is sometimes mixed with Woodland Caribou and the Bluenose herd.

Like the Polar Bear and Muskox, they are a popular natural resource attraction for naturalists and photographers.

Coppermine and Bathurst Inlet are the best places to observe the herd and although they cannot be hunted by southern tourists there has been discussions about changing this policy.

3.4.2 Birds

Most birds can only be found in the region during the spring and summer. In fact the mature gyrfalcon is one of the few major bird species that permanently resides in the NWT. A number of birds are of part cular interest to naturalists, including the golden eagle, falcons and hawks.

Gyrfalcons do not nest but lay and incubate 3 eggs on narrow cliff ledges frequently near water, such as along the Coast on the Arctic Islands. It has always been one of the most highly prized birds by falconers and today it has much status in the world of falconry. Nevertheless the $5,000 export fee has depressed the sales to the Middle East.

Peregrine falcons, which are on the endangered species list, are also popular with birdwatchers and their populations seem to be slowly rising. Nevertheless their hunting skills which make them desirable by hunters and poachers threatens their population.

The rough-legged hawk is one of the most abundant hawks in the region and their population is stable.

Other northern birds include the land-based snowy owl, and rock ptarmigan as well as a variety of ducks, geese, loons and swans.

3.4.3 Fish

Arctic char, lake trout and, to a lesser degree, whitefish are a basic food of the people of the region and excellent fishing sites can be found along the coast. Rivers also contain an abundance of sport fish, particularly the Back River, as it enters into Chantrey Inlet. In fact it has been considered by a sports writer (for the international magazine, "Field and Stream") as one of the best fishing sites in the world(4). Lake trout of outstanding size can also be found on the Back River and the Tree River and the lakes near Cambridge Bay are known for excellent Arctic char fishing. The Tree River is licensed to the Plummer Lodge exclusively.

Landlocked char and Arctic char are favourite game fish of the northern angler and it is fished at many of the rivers leading to the Arctic Ocean as well as on certain lakes.

3.4.4 Marine Mammals

The Arctic Ocean contains one of the world's largest concentrations of marine mammals. As a food, fuel and clothing source, the mammals have been closely tied to the survival of the Inuit people. The cold waters of the ocean contain many seals, and occasionally whales. While the latter may fascinate the nature enthusiast, the former are hunted regularly by local people. The ringed seal is found frequently along the arctic coast and on occasion narwhal have been sighted. Creswell Bay, on Somerset Island is an important area as a beluga calving ground, offering opportunity for fly-in interpretation tours.

3.5 NATURAL FEATURES AND ATTRACTIONS

3.5.1 Rivers

Rivers and coastline create some of the most dramatic features in the region. The most important rivers in the region are the Coppermine, Burnside, Back and Tree.

3.5.1.1 Coppermine River

The Coppermine River is the most popular river in the region and each year several dozen canoeists take the 640 km trip from Lac de Gras to the Arctic Ocean. The trip combines flat water canoeing, rapids and white water. The river takes travelers past trundra, across tree-line and through the Coppermine Mountains around the historic Bloody Falls and finally to the important Arctic community of Coppermine. The trip takes approximately three weeks and must be undertaken by experienced paddlers. In some narrow sections the river boils and certain rapids and all of the falls require portaging.

The history of the Coppermine River is also one of the more important attractions to canoeing the river. The Inuit often travel led the headwaters to hunt for caribou and in 1771 Samuel Hearne was the first European to travel to its mouth. John Franklin made two trips down the river, the first with the namesakes of other Arctic Coast Rivers - Back, Richardson and Hood. Flora and fauna are the most interesting features of the river. The tundra is the home of caribou, wolf, fox, hawks and falcons and fishing for trout, grayling and Arctic char is excellent. Along the shore, canoeists can photograph barren-ground grizzly, caribou, muskox, geese and swans. The forest cover is continually in transition for the paddler, as the spruce groves are gradually replaced by a variety of tundra vegetation including grasses, flowers, shrub willows and lichen.

3.5.1.2 Back River

Although much of the river is outside the studyarea it is an important access into Chantry Inlet and possibly Gjoa Haven. This "awesome" Arctic river offers both a challenging arctic experience as well as a chance to trace the route of George Back who first explored the area in 1833-34.

Like other Arctic rivers, the Back River is a demanding, swift flowing adventure stretching 800 km (500 miles) across the NWT and flowing into the Arctic Ocean. Boiling rapids and swirling waters combine with the serenity of peaceful lakes. Like other Arctic regions the landscape is alive with spectacular flora, hundreds of Caribou, Arctic wolves and muskox and in the air are huge flocks of geese and the occasional pair of whistling swans.

The Back River also includes one of the larger bodies of fresh water in the area - Pelly Lake, where frequent winds can be both challenging and frustrating.

3.5.1.3 Hood, Richardson, Burnside and Tree Rivers

These four rivers essentially offer similar experiences to the Coppermine and Back Rivers.

Although shorter than the Coppermine and Back, they all pass through endless expanses of isolated and desolate tundra, punctuated only by the exciting opportunity of seeing Arctic wildlife in its most pristine environment.

3.6 SPECIAL AREAS

3.6.1 Overview

There are no national parks in the Arctic Coast Region and the only officially designated ecological area is the Queen Maud Gulf Bird Sanctuary(5). Nevertheless Bathurst Inlet has been proposed by Parks Canada as "A Natural Area of Canadian Significance''(6). It was considered in 1978 as one of the "6 north of 60 " areas representing the northern landscape and natural features. There has been little public support for the proposal and "it will have to be reconsidered in view of the recently completed assessment of potential non-renewable resources by the Geological Survey of Canada''(7).

3.6.2 Bathurst Inlet

The Bathurst Inlet ecosystem is located in the northeastern district of Mackenzie. The area, outlined by the Canadian Committee for the International Biological Program, covers 24,200 km.

3.6.2.1 Description

The Bathurst Inlet region possesses a range of landscapes from the flat, gently rolling, drift-covered uplands of the southwest, to the steep rocky hills south of James River, and the flat silt-covered lowlands, broken by scarps within the inlet. Two physiographic areas are recognized: the Mackenzie Uplands on either side of the inlet, penetrated by the Coronation Gulf lowlands to produce Bathurst Inlet. Eskers are both numerous and continuous throughout the region.

3.6.2.2 Exceptional Features

The scenic variation within so small an area is uncommon on the Canadian Shield. The vegetation, although relatively rich, is representative of a mainland low arctic site. Shrub willow up to 2m (7 ft.) high is found in sheltered valleys and on lower slopes of the inlet. Dwarf-shrub heath dominates the better drained lowlands, while sedge tussocks are common in the poorly drained areas. A rock desert prevails in upland areas and at low elevations on the coast.

Part of the calving grounds of the Bathurst caribou falls within the site. The main calving area is located between the Ellice River and the eastern side of Bathurst Inlet. Some small caribou herds over-winter in the area. Muskoxen, wolves and barren-ground grizzly bears are relatively common.

3.6.2.3 Accommodation/Services

The area is also the site of the internationally acclaimed Bathurst Inlet Lodge which offers a variety of nature and cultural programs including birdwatching, sightseeing, guided nature tours, fishing, native entertainment, etc.

3.6.2.4 Natural Areas of Canadian Significance

Parks Canada have identified a 13,000 km area for possible designation as a "Natural Area of Canadian Significance" which would consequently "be protected as part of the heritage of all Canadians, now and in the future".

The designation would create national/international recognition for the area and an important exposure for the region in the market place.

Any change in status however, should be done in close collaboration with all peep'le living and working in the selected area.

The existing lodge operation also could provide excellent service to the new travel markets attracted to this national site.

The resources of the proposed area include:

- magnificent scenery;
- largest herd of barren-ground Caribou in Canada;
- a traditional Inuit culture;
- innumerable lakes and streams;
- upland plateaus and striking rock outcropping;
- Wilberforce Falls - highest in the world above the Arctic Circle, and Window Falls;
- large population of tundra animals and approximately 100(8) species of birds; and
- critical wildlife zones including peregrine falcons nesting area, staging grounds for migrating waterfowl, and muskox calving areas.

3.7 CLIMATE

The Arctic climate is cold and dry with the average daily temperature rarely exceeding 10°C in the warmest months. Coppermine, which is the warmest community in the region, has a mean average high in January of -29°C. Spence Bay is slightly colder at -33°C. Precipitation is low throughout the region and generally averages around 10 cm of rain and 100 cm of snow per year. These desert conditions make the region one of the driest in the world. Spring comes late but suddenly. Because the Arctic is covered in snow for eight months, the spring can be an excellent time for tourists because of the opportunity to travel on snow and ice and still enjoy relatively milder temperatures.

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(2) Cowam I. McTaggart. "Wildlife Conservation Issues in Northern Canada". Science Advisory Board of the Northwest Territories, GNWT, Yellowknife, 1981.

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(4) Schultz, Ken. "Hooked on Chantry". Field and Stream, 1982.

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(6) Bathurst Inlet - A Natural Area of Canadian Significance, Parks Canada, Indian and Northern Affairs, Ottawa, 1978.

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(8) Interview with naturalist in Coppermine.

4. CULTURAL & HISTORICAL RESOURCES

4.1 OVERVIEW

The cultural and historical resources of the Arctic Coast region are one of its major attractions.

Artifacts and ways of life in the region incorporate aspects of the Pre-Dorset, Dorset and Thule cultures. Within the region, three sub-groups of Inuit, the Copper Inuit, the Netsilik Inuit from the South Baffin area and the Ukkusiksalingmiut from the Chantry Inlet area for the basis of the current population.

First contact in the area was in the late 18th century with the arrival of Hudson Bay Company employee, Samual Hearne via the Coppermine River. In the early part of the 19th century there was a great deal of exploration activity in the area with the search for the Northwest Passage. The disappearance and subsequent search for the Franklin expedition led to even more activity. The current English names of the many islands, inlets, peninsulas and straits in the region are representative of the many people involved in this early exploration, while the Inuktitut names date back to the traditional uses of various geographic areas.

The fact that this region contains a prominent portion of the history of Canada, and that the exploration activities continue today, provides a very strong attraction for current "explorers" which is evident in this summer's attempt by the Lindblad Explorer to navigate the sometime treacherous Northwest Passage.

The more modern history of the area from the arrival of traders, missionaries, RCMP, government services and finally the development of permanent communities is also a major part of the historical resource of the region, with its related collection of picturesque stone churches, abandoned trading posts and isolated communities with modern "southern" amenities.

Some archaeological activity has been underway in the area over the years as academics attempt to learn more about the lifestyle and progress of man in this harsh environment.

4.2 CULTURAL RESOURCES

4.2.1 Pre-Contact Period

The current Inuit lifestyle has evolved from three different preiods, with evidence of each period available in some form in today's communities of the Arctic Coast region.

The Pre-Dorset period of some 4-5,000 years ago was a migration of people from the west. They moved quickly across the entire Arctic and originally lived in more northerly areas than are currently populated. About 3,500 years ago they moved south into the area of this study along the Arctic Coast. Their lifestyle, known as the "small tool tradition" involved the use of tiny blades of flint to cut tools for other uses. Many of the tools they made and used in their daily activities can still be found in today's Arctic Coast communities. One of the more common tools, the UIU, dates back to this very early culture and is still regularly used in Inuit camps or kitchens.

Although there are few authentic pre-Dorset culture artifacts on display in the Arctic Coast, many modern day variations of these artifacts are available to view or purchase in most communities.

The Dorset period, starting some 2,500 years ago and extending for some 1,500 years, saw the introduction of such things as the snowhouse, the bone snowknife and oil burning lamps, to the culture of the Inuit. Again, these items continue to be part of the lifestyle of the Inuit of this area, and although they occasionally use snowhouses when hunting or traveling, they continue to retain this part of their culture.

The Thule culture developed about 1,000 years ago in the Bering Sea and again spread across the North to Greenland. The Thule culture involved whale hunters, and when the whales moved east, the people followed. Items such as harpoons, kayaks and umiaks, as well as the use of dogs for transportation were developed through this period and again there is evidence of these items in the present lifestyle of the Inuit of the Arctic Coast. The Thule culture absorbed or eliminated the Dorset people and the Thule people are the direct ancestors of modern Inuit.

Within the Arctic Coast, there is generally much visible evidence of all the previous cultures of the Inuit and in a few communities such as Holman and Spence Bay, some effort has been made to display this culture in small museums, for the benefit of both residents and visitors. Old sod house sites and tent rings have been located in many parts of the region.

4.2.2 Modern Inuit

Today's Inuit population in the Arctic Coast has descended from two major Inuit sub groups: the Copper Inuit in the western communities and the Netsilik Inuit of the eastern communities. The eastern communities also include some Baffin Inuit who were relocated to Somerset Island then moved to Spence Bay, and some Ukkusiksalingmiut from Chantry Inlet who moved to the Arctic Coast region.

The Copper Inuit lived on Victoria Island and around Coronation Gulf as far east as Bathurst Inlet. These Inuit fashioned the copper found in the area into implements which they bartered to neighboring groups. They were dependent on both land and water, and were experts in sealing and in the summer went to the tundra to hunt muskox and caribou.

The Netsilik Inuit live in the eastern section of the Arctic coast region. The root of their name means "jar seal" in Inuktitut, reflecting their major food source. The channels and bays of their territory were ice bound most of the time, and the Netsilik became possibly the most adept of all Inuit at seal hunting on winter and spring ice.

Although there are some differences between the groups in such things as traditional dress and language, this difference is not obvious to the casual visitor, and little exists to inform the visitor of the background of a specific group of Inuit.

4.2.3 Traditions, Folklore

Traditional activities and events have been maintained to various degrees in the different Arctic Coast communities. Traditional games continue to be played. Traditional sports such as the high kick, arm reach, continue to be popular in many communities and traditional gatherings for special events continue in some communities.

Drum dancing, story telling, sewing and using traditional clothing such as caribou parkas and pants, making of komatiks, carving, drying fish, etc. are abvious parts of the Inuit culture and continue to be very evident in the communities today.

The hisotry of shamanism and modern shamans, are a part of the Inuit tradition, and the folklore follows the land in some areas (the naming of Mount Pelly, Baby Pelly and related stories). The presence of the "little men" along the Arctic Coast mainland continues as part of the ongoing folklore of the Arctic Coast people.

4.3 HISTORICAL RESOURCES

For the purpose of this outline we have classified historical resources as post contact. Earlier history has been included in the cultural area.

The history of the area is mainly tied to early and current exploration and the actual development of the area.

4.3.1 Exploration History

The exploration history of the area is filled with tales of adventure and hardship; and is known by people around the world. The exploration history includes the search for the Northwest Passage, the subsequent search for the lost Franklin expedition, scientific and resource research and modern research and development.

4.3.1.1 The Northwest Passage

Coming overland and by water, explorers attempted to find the elusive route to the Pacific Ocean. The British Naval Service in the early 19th century was the main player in the search for the Northwest Passage. Following the disappearance of the Franklin Expedition in 1845 activity in the area increased, when many expeditions went out in search of Franklin's ship and any possible survivors.

Since much of this period also involved mapping, the entire Arctic Coast bears the names of many of the explorers, their crew members and their sponsors.

Although McLure was credited with discovering the Northwest Passage in the mid 19th century, it was not until the early 20th century that Amundsen was the first person to navigate the passage from east to west. It was not until more than three decades later that the first Canadian ship, under Captain Henry Larsen successfully navigated the passage from both east to west and west to east. And the history continues, with the successful navigation of the Northwest Passage of the Lindblad Explorer in the summer of 1984 . . ..the first passenger ship to navigate the passage.

The history of the area is quite exciting, yet there is limited evidence in the Arctic Coast of this search for the Northwest Passage. Although exploratory and archaeological work is continuing, only a remote marker or cairn notes the achievements of these explorers. And the history is not well explained or displayed in the area. Amundsen's ship the Maude sits in the Cambridge Bay harbour after an extended life with the Bay, but few people know the significance of this explorer, or the fact that this ship carried planes to the Arctic in the early 20s, when Amundsen attempted to stage a pioneering polar flight.

Some artificats discovered in the King William Island area provide evidence of camps related to the fateful overland trek of Franklin's crew. The discovery of Kellett's warehouse is another known site, but most of the history of thea area is preserved far from the region.

4.3.1.2 Traders

After explorers, the next group to move into the area were the traders. They included independent traders, the Hudson's Bay Company and several other companies including the Canalaska Company. Traders started moving into the area in the early 20s and by the mid 20s posts were opening in specific locations across the region. There was also much relocation of posts, closing of posts and finally the establishment of trading posts in permanent communities.

There are a number of these abandoned posts left in the region, and local comment indicates that some are in relatively good cond· tion, specifi-tally the old Bay Post at Fort Ross.

The trading history makes up a significant portion of the history of the North, but is currently not displayed or highlighted within the region.

4.3.1.3 Missions

The missionaries generally followed the traders, since the trading post attracted the people to a central location.

The first missionaries arrived in the late 19th century, but it was not until the 1920s and 1930s that the missions became established in the Arctic Coast, with both the Anglican and the Roman Catholics establishing facilities.

The early mission history is most evident in the stone churches at Pelly Bay, Cambridge Bay and Spence Bay, but additional work would be required on these buildings if they are to serve as tourism attractions.

4.3.1.4 Scientific and Modern Exploration

In addition to the search for the Northwest Passage, early exp" orers were also looking for mineral and natural resources. Hearne's trip down the Coppermine was connected with the search for copper. Other expeditions were looking for gold or non-precious metals. As ar back as the 1920s mining and exploration work was being carried out around Bathurst Inlet. today a number of abandoned sites, specifically one in the centre of Victoria Island dot the region.

The many mapping and research expeditions of the Government of Canada added to the knowledge of the are, but it was not until the mid 1950s that the area was completely mapped. Establishment of Canadian sovereignty also brought many expeditions into the area over the years. Scientific and exploration work continues in the area, usually in the summertime, with an influx of biologists, geologists, archaeologists, etc. Little has been done to explain the current development of the region.. . development which allows participants to be part of the "living" history of the area.

4.3.1.5 DEW Line Sites

Following the second world war, a series of Distant Early Warning sites was established across the north at 50 mile intervals. There are a number of operational sites in the Arctic Coast region, as well as a number of abandoned sites (following the policy to have a site every 100 miles rather than every 50 miles) Equipment from the construction of these sites is evident in many areas of the north and particularly in Pelly Bay. DEW line sites do not generally encourage tourist visits, but have arranged small trips to select parts of the operation when given enough advance notice.

4,3,1,6 Aviation

The history of Arctic aviation is also tied to the Arctic Coast area. Although a number of attempts were made to fly to the pole, and to fly across the Arctic, it was not until the late 20s that the first successful flight was made to the Arctic Coast, landing at Cambridge Bay. Today Cambridge BAY is a main check-in point for trans-polar flights, and the region is regularly crossed by many major airlines.

Closer to home, the local aviation service, with its historical DC-35 is part of the aviation experience of the modern visitor.

4.3.1.7 Communities

The most recent part of the history of the area involves the development of communities. Fifty years ago the Arctic coast was mainly a collection of nomadic people. With the development of trading posts and missions, a type of community focus started.

Coppermine is likely the oldest community, although the nursing station was not established until 1948 and the schools was built in 1950. The construction of the Loram Navigational Beacon at Cambridge Bay in 1947 and the DewLine site in the 50s hastened the development of a community there. Other communities such as Pelly Bay were not really established as communities with permanent housing until the early 60s.

From focal centres with a trading post and mission, the communities evolved in a very short time to places with modern schools, community centres, municipal offices, Bay department stores and modern housing.

4.4 DETAILED MAPS

The Government of Canada's mapping group is currently completing detailed "land use" maps for the Arctic Coast region. The maps will include marked historic sites, cultureal sites, identify abandoned buildings, etc. When these maps are available, we will forward a set to the Arctic coast tourism office.

4.5 HUMAN RESOURCES

4.5.1 OVERVIEW

The Arctic Coast is the most sparsely populated region in the Northwest Territories. Less than 3500 people (roughly 8% of the total NWT population) live in the seven far-flung communities. There are two larger population centres in the region, Cambridge Bay and Coppermine with Cambridge Bay serving as the administrative . centre for the region. The population of both of these centres is approaching 1,000.

More than 90% of the residents are Inuit, with non natives mainly working as teachers, nurses, in the RCMP or in other civil service jobs. In-migration from other regions of the NWT has been limited due to the location of the Arctic Coast communities, and the transportation links to them. One relocation program saw the Hudson Bay Company move some eastern Inuit into the region some 40 years ago. The development of regional government in Cambridge Bay increased the population of that community by over 25% in five years, mainly through the addition of government employees, and the creation of new positions in the community.

The unemployment rate in the region is very high, while the limited economic base and relatively low education and skills levels keeps employment potential low. Combined with an above-average birth rate, and a decrease in the hunting and trapping economy, the future economic prospects for the area are not bright, unless there is increased renewable and non renewable resource development, including tourism development.

4.5.2 Population

The 1981 census listed a total population for the region of 3215. In the past three years, this has likely increased by close to 10% for a 1984 population of approximately 3,500. Cambridge Bay and Gjoa Haven are the fastest growing communities in the region, while only Spence Bay decreased in size from the 1976 to the 1981 census statistics. This area, like much of the NWT has a birth rate which is above the Canadian average.

The population is fairly evenly divided on a male/female basis. Approximately 57% of the population is of labour force age (15-64) and another 27% is in the 5-14 age category. A very small proportion of the population is over 65.

4.5.3 Labour Force

Currently 57% of the population is of labour force age (15-64). Assuming that approximately 30% of this group is not actively seeking work (still in school, disabled, small children to look after, could be too old at the upper end of the age range) we are left with a work force which far exceeds the number of full time jobs in the region.

Seasonal jobs such as construction, tourism (although limited now) barge unloading, add to the job and income situation in the region, but do not meet the growing demand for wage income. Hunting and trapping have also decreased due to the low return on furs, and the high cost of supplies and gasoline for this activity.

Assessing the standard jobs available in each community and the level of training among community residents, we would estimate that the unemployment rate could be as high as 50% in the region. With a large number of young people expected to enter the labour force in the next 10 years, and with the knowledge that the people of the region are unwilling to move to larger centres such as Yellowknife, on a long term basis, this region will possess a relatively large supply of available workers who over a ten year period could be trained for a range of jobs.

4.5.3.1 Job Opportunities - Existing

Job opportunities are fairly standard in all communities, with the municipal government (hamlet), the Co-op, federal and territorial government, the Bay, housing associations and native organizations providing most of the jobs. The private sector is almost non-existent in most communities, apart from Cambridge Bay, and any jobs in private businesses are usually filled by owner managers. Jobs such as nurses, RCMP, NCPC operators, are usually filled by non-natives as are many GNWT jobs. In the past few years, specific training programs, including teacher training, renewable resource training, airport observers training, etc. have moved a few more people into standard community based jobs.

4.5.3.2 Education/Skill Levels

The education and skill levels among the native people of the region are quite low. Considering the fact that schools have only been in place in the region for the past 25-30 years, and ther is no high school in the region, it could take some time to increase the education levels. Most communities provide kindergarten to Grade 9 level education. As well, most have a resident adult educator to assit with upgrading and training programs,

Although we do not have the exact figures, we estimate that the number of high school graduates is quite low (less than 10% of the working age population) and that a very small number of Inuit residents have completed post secondary education, More residents. are enrolling in courses at Thebacha College in Fort Smith, but to date the college does not offer a full time tourism course or tourism training program.

Skills are slow limited since many of the residents do not have the educational requirements to enter apprenticeship programs. Standard skills related to community operation (heavy equipment operators) exist in most communities but more specialized skills such as electricians or journeymen carpenters are limited.

Business related skills are also limited as are management skills. In gneral the reason for this low skill level appears to be that there has not been a demand for these skills.

According to visitor data, the number of tourists to this region has been low in the past decade. Only in the past five years has a hospitality industry (in the form of a number of co-op hotels and several outfitters) been put in place. In general the communities have had very little contact with "real" tourists, and have not recognized the potential of the business/government traveller to the region.

To develop tourism in the area, a main requirement is a strong tourism training program, and a knowledgeable tourism co-ordinator in each community. This training must include a basic understanding of tourism, a general grasp of promotion, planning, hospit[illegible] and an ability to lead, the way in tourism development for the other people in the community.

4.5.4 Income

Income per capita (according to 1981 statistics) was highest in Cambridge Bay ($10,681) and lowest in Gjoa Haven ($3,038). All other communities with more traditional economies were near the low end of the scale, with per capital incomes ranging from $3200 in Holman to $4400 in Coppermine.

With the drop in the fur market, trapping income has declined in the past few years as has income from the production of carvings and handicrafts. New construction in the area including nursing stations, community centres, houses, has provided some support to local incomes.

4.5.5 Socio-Economic Characteristics

The communities of the Arctic Coast, with the exception of Cambridge Bay and Coppermine continue to rely heavily on the traditional economy. Hunting and trapping and handicraft production form the basis of the economy in most communities. Coppermine and to a lesser degree Holman have some contact with the non renewable resource industries, and have residents working for mines and oil companies on a work-rotation basis. The wage economy has long been dominated by government related jobs, and only in the past few years have a few private entrepreneurs emerged.

For many communities, their original location was selected in relation to hunting and trapping, and apart from that activity, the location is less than suitable for other forms of economic development. There is some commercial fishing in the area, mainly at Cambridge Bay, and some tourism, mainly at Holman and Bathurst Inlet . There is also some small involvement with the two operating fishing lodges in the region, but this provides only a small income benefit to the residents.

5. INFRASTRUCTURE

5.1 HOUSING

Although housing is continually being built or "rehabed" there is still a shortage of houses in the Arctic. Due to the high costs of construction and utilities, very few homes are actually owner-occupied. This creates a particular barrier to developing bed and breakfast as an alternative accommodation service.

Because of an adequate inventory of acceptable homes that could be used as both temporary, alternative or emergency accommodation, it would seem important to attempt to change legislation that presently prohibits charging a fee for lodging in a government house.

5.2 TRANSPORTATION

5.2.1 Airports

The airports in the central Arctic adequately serve existing air travel requirements and there are no anticipated improvements projected to the six facilities in the near future.

5.2.2 Aircraft

The region is served by:

scheduled Northwest Territorial Air service to each community, other than Bay Chime, from Yel lowknife, Winnipeg and Hall Beach;

- Pacific Western Airlines from Edmonton and Western Canada to Cambridge Bay;
- once a week scheduled service from the Western Arctic (Inuvik) into Holman by Kenn Borek Air, and once a week from the Baffin Region (Hall Beach) to Pelly Bay by First Air;

charter service throughout the region by Adlair Aviation, Bathurst Inlet Air Service, and Kenn Borek Air.

While there is a jet service from Yellowknife to Cambridge Bay, the remainder of scheduled air travel is by DC-3, one of the oldest commercial aircraft still being used. Considering the low volume to tourist travel and the high operation costs it is fair to say that air service to the communities is entirely acceptable. In fact, travel on a plane built in the mid 1930's is somewhat of a unique, "historic" experience.

On the other hand, the older equipment is much more unreliable and when this factor is combined with unpredictable weather it makes northern flying unreliable. While this siutation is presently tolerated it becomes a significant issue when there are higher volumes and tour operators attempting to schedule packages - many of which may be tied to southern, inflexible economy fares.

While charter aircraft could alleviate some of these problems, they cannot provide the low fares available from advance booking on the scheduled carriers.

5.2.3 Airline Costs

The costs of flying in the north is of concern to both residents and potential travelers. Costs can only decrease if there is a concerted effort on behalf of the airlines to package tours and promote them.

Pacific Western Airlines has already started promoting northern tours with "Great Canadian Adventures". Nordair is also becoming more agressive and is working with ground operators in the Baffin Region.

Although NWT Air has been very bold in reducing its advance booking costs it has made no attempt to put together comprehensive packages and promote them through southern wholesalers.

5.2.4 Roads

Roads exist only in and around the communities and provide access to lakes and sites such as Mount Pelley. There have been talks about extending existing winter roads to Coppermine. This could significantly reduce costs.

5.3 WATER AND WASTE

5.3.1 Water Supply and Distribution

For the most part water is trucked to the various tourism related facilities as well as many of the houses in the region. It is generally taken from a nearby lake or stream by a suction hose and then transported by a 5683L (1200 I gal) water truck. In all communities there is an abundant water supply and increased tourism would not have an impact (e.g. Cambridge Bays water comes from Water Supply Lake which has a summer volume of 1.7 million cubic inters). It is stored in 2273L (500 I gal) to 45,500L (10,000 I gal) tanks which is adequate to response to increased tourism demand.

Water is chlorinated in Cambridge Bay, Coppermine and Gjoa Haven, at their storage tanks, but in the other communities is left untreated. Although hardness and turbidity tend to vary with the season, the water in all communities is suitable for consumption.

Certain facilities, such as the nursing station in Coppermine and Spence Bay are hooked to a utildor system. Delivery service is usually six days a week and depending on need, tanks are filled at the hotels every 2 to 3 days. Increased demand created by tourists would only necessitate a more frequent delivery schedule. This would not place additional vehicle requirements since residential demand is at a low during the summer months.

Conversely, when residential demand is the highest (winter), tourists demands are the lowest.

Bathurst Inlet has no water supply system.

In summary then, the existing water distribution system is flexible enough to respond to immediate and long term increased demand created by additional tourists. By either increasing frequency of delivery or installation of more or larger tanks, additional demand is easily accommodated.

5.3.2 Sewage Collection

Sewage is collected by either a sewage pumpout system or to a lesser degree by bagged sewage.

Nest of the buildings in the Arctic Coast have a holding tank for both toilet wastes, sink and wash water and collection is carried out several times a week by 4540L (1000 I gal) to 5675L (1200 I gal) sewage tanker trucks.

In all cases sewage is discharged on the land outside of the hamlet and usually in close proximity to the garbage dump. Only one dump, at Coppermine seriously affects the experience of the residents and tourists but that is scheduled for relocation.

Within a few months, the only hotel to still use the "honey bucket" system will be the Paleajook Hotel in Spence Bay and there seems to be no plans to upgrade it to limited flush toilets (as the Coppermine Inn is doing).

As with the water system, it is only necessary to increase the frequency of sewage collection to respond to increased tourism.

6. TOURISM PLANNING UNITS

6.1 OVERVIEW

Tourism planning for the Northwest Territories' Arctic Coast Region is unlike planning for any other tourism region in North America. Its vast, arid barren-grounds and thousands of miles of coastline present some of the most visually distinctive scenery in the world yet it is dotted by a mere seven communities spread across a 1300 km long coastal corridor. Connected only by DC-3 scheduled air routes and charter aircraft, each community has developed its own unique characteristics - frequently as a function of its surrounding landscape (natural resources) and its cultural differences (heritage resources).

Due to the diversity associated with each community and its surrounding hinterland, it is possible to define distinguishable units or zones that individually express the uniqueness of each hamlet and collectively express the complete character of the Central Arctic.

For the purpose of simplifying the planning process, each community and its surrounding related landscape will be defined as a planning unit. The unit has been designated as a function of the available natural and heritage resources that can realistically he affiliated with a given hamlet as well as the overall area considered important to various leaders in each community. The latter was defined by having select people, in each hamlet, locate associated tourism related features.

The planning units therefore are a function of available resources and community definition and are based on the following guidelines.

- reflect, in surface area, what is generally considered to be the limits of the territory used by each community including their natural and heritage features;

- focus on those areas that are presently developed, i.e. they include one community and its associated services and infrastructure;
- allow each unit to serve as a desintation area within itself due to the costs of travel between units;
- ensure that each unit responds to the demands of at least one or two of the target markets, yet respects the basic natural and cultural integrity of the destination area;
- each unit must project an individual uniqueness, vis-a-vis the other units, and consequently create a balance throughout the Arctic Coast region;
- development opportunities must be concentrated for maximum impact and efficiency; and
- service should be community-based and supported by the training of individuals within each planning unit.

Seven planning units have been selected (see Destination Regions - Plan 1). Each unit focuses or centers on a community or lodge (Bathurst Inlet) and encompasses areas of between 20,000 and 30.000 sq. km of land and water.

Each planning unit will:

- be considered as and called "a destination area";
- combine and develop both land and water based facilities and activities;
- as much as possible try to respond to the potential travel interest in each of the seasons and extend the length of the existing summer season;
- provide enough variety in the long term to allow continued market expansion within each target market; and
- be developed in co-ordination with the other planning units in order to improve or create opportunities for travel between the various communities.

The planning units will be called:

Unit 1	Holman Destination Area
Unit 2	Coppermine Destination Area
Unit 3	Cambridge Bay Destination Area
Unit 4	Bathurst Inlet Destination Area
Unit 5	Gjoa Haven Destination Area
Unit 6	Spence Bay Destination Area
Unit 7	Pelly Bay Destination Area

6.2 THE PLANNING UNITS

6.2.1 Holman Destination Area

This desintation area on the Northwest corner of Victoria Island encompasses the eastern half of the Diamond Jenness Peninsula and the Albert Islands and the waters of Minto Inlet and Prince Albert Sound.

The area centers on the community of Holman, famous for its silk screening and print making. The name of the late resident artist, Helen Kalvak, is known throughout the world by collectors of Inuit art and her vivid creations can be found in craft shops across Canada.

Holman has more recently become known to big game hunters as a departure point for Polar bear hunts extending from the Prince Albert Peninsula to Melville Island.

Holman is respected by those who have visited the community for its hospitality and the friendliness of its people. It is the most northerly community in the Arctic Coast Region being located almost 500 km above the Arctic Circle and 925 air km above Yellowknife. It is also accessible from the west via Inuvik (670 air km).

Its access to excellent Arctic char and trout fishing are shared by other units in the region as is the availability of traditional Inuit lifestyle and Arctic wilderness experiences.

6.2.2 Coppermine Destination Area

The Coppermine Unit extends from the Richardson River on the west to the Tree River on the east and includes the 640 km (400 mi) long Coppermine River Canoe Route.

The destination area's particular uniqueness results from the very popular canoe river - the Coppermine, which is known throughout North America as a "classic" wilderness river attracting dozens of outdoor enthusiasts each year(l).

Coppermine, located at the mouth of this mighty winding river has a distinctive history as the point of origin of two great Inuit cultures (the Denbigh and the Thule-Inuit). In 1927 the Hudson; Bay Company established a trading post and the population has since grown to more than 800, the second largest in the Kitikmeot Region.

Coppermine holds particular interest to tourists wishing a true arctic experience since it is the closest; and one of the least expensive, scheduled air-route from Yellowknife. Located on Coronation Gulf, above tree line, it provides access to the Arctic Ocean and Tundra yet has a favorable summer climate that regularly reaches 14° - 16°C.

Although the traditional lifestyle may not be as obvious in this larger community there is an excellent selection of soapstone and caribou bone carving and native copper artifacts. Of course, char fishing is available along the coast line and trout fishing is excellent on the major water bodies in the destination area.

6.2.3 Cambridge Bay Destination Area

This planning unit encompasses the southeast tip of Victoria Island and includes the coast of the north west end of Queen Maud Gulf as well as the fresh water resources of Ferguson.Grenier and Kitiga Lakes.

Cambridge Bay is "the most urban" community of the region and serves as its transportation, communications and administrative hub. It is consequently the territories "secondary gateway" to Gjoa Haven, Spence Bay, Pelly Bay and to a lesser extent, Bathurst Inlet-Bay Chimo as well as specific sites within the areas such as High Arctic Lodge, Char Lake and the outpost camp at Hadley Bay. Historically its waters sheltered most of the explorers who have sailed the Arctic and the remains of Amundsen's ship the "Maud" waits its "rebirth", as a historic attraction in the waters of Cambridge Bay Harbour.

The landscape, although very flat, is not without its distinctive character created by three small mountains off on the horizon outside Cambridge Bay. The largest, Mount Pelly is accessible by vehicle and allows visitors an easy opportunity to view the Arctic landscape as well excellent areas for viewing wildlife and birds.

Like other arctic destination areas, fishing, hiking, camping and shopping for arts and crafts are available.

6.2.4 Gjoa Haven Destination Area

This large planning unit includes the historic King William Island on the north and extends south to the arctic char and trout filled waters of Chantry Inlet. The area combines a number of potential tourism activities including excellent fishing, opportunities for nature interpretation and most importantly the historic interpretation of the dramatic events surrounding the search for and discovery of the elusive Northwest Passage.

"If there is any place in the north that is haunted by ghosts it is certainly King William Island''(2).

The western shoreline of the island was the graveyard from the disasterous Frankline Expedition and place names such as Victory Point, Erebus Bay, Terror Bay, Douglas Bay, and Starvation Cove indicate the final resting place of some of the crew members. Gjoa Haven, was for two and a half years the home of the Northwest Passage discoverer Captain Roald Amundsen, who established a scientific station there.

The island is surrounded on the east by the James Ross and Rae Straits which were undetected during four hundred years of European exploration. Finally, the distinguished Arctic explorer, Admiral Sir Leopold McClintock, unlocked their secret and with it the passage to the Pacific Ocean.

The community of Gjoa Haven is culturally interesting because unlike the hamlets on the western side of the region, it has been populated by the Netsilik Inuit whose traditional territory was King William Island. As well they have been joined by the Ukkusiksalingmuit from Chantry Inlet.

The Chantry Inlet Lodge on the Back River, could be linked to the community of Gjoa Haven as it seems the owners of this property have indicated a willingness to sell a share of the facility to local natives. The Chantry Inlet fishing area has recently been described by a journalist for the international magazine Field and Stream as "one of the best fishing areas in the world''(3).

A native involvement in this type of facility would be a promotional advantage and would possibly gain international exposure for the Gjoa Haven Destination Area and the Arctic Coast Region.

There are also ample opportunities for nature interpretation and the areas around Swan Lake is frequented by Sandhill Cranes, Trumpter Swans, Canada Geese and Eider Ducks.

Gjoa Haven also has more dogsled teams than any other community providing opportunity for spring trips to parts of the islands as well as for traditional polar bear hunts.

6.2.5 Spence Bay Destination Area

This planning unit includes the area and coastline around Spence Bay and encompasses the lower section of the Boothia Peninsula extending to Fort Ross on Brentfort Bay. The landscape around Spence Bay is essentially rugged and the community's focus is toward the ocean for seal hunting and fishing. By contrast the area around Fort Ross has developed along a fault-line in the Precambrian rock. The remains of the Hudson's Bay Company post at Fort Ross are still intact as it was only abandoned in 1947. As well, several Inuit Stone houses can still be found to the north on the shore of Hazard Inlet.

Inuit, from old Fort Ross, were eventually brought to Spence Bay. The link between the two sites still seems to be strong as many of the community's residents visit the southern tip of Somerset Island each year. Spence Bay is also the only community where there has been contact between the Inuit of the Netsilik and Cape Dorset cultures.

The northern part of this destination area is also accessible from Resolute which is approximately 300 km from Fort Ross.

Spence Bay which is the northern most community on the North American continent, has gained an international reputation for its renowned Spence Bay Parkas that are produced by the talented women at the Taloyoak Shop. They also make the popular packing dolls which have gained an international reputation.

6.2.6 Pelly Bay Destination Area

The Pelly Bay Unit is remote and at 1312 air km from Yel lowknife it is the most expensive community to visit and consequently has the highest cost of living in the North. This economic isolation however has its hidden benefits, for "Pelly" is still the most traditional community in the region and is a relatively authentic cultural expressions of the Inuit of the N.W.T. Efforts are being made to maintain “the old ways” and tapes are being produced to preserve the words of the older generation.

The planning unit includes the entire Simpson Peninsula with future tourism activities potentially taking place on either side of Pelly Bay. Attractions could include visiting the old stone houses on Harrison Island and possibly Laga Point as well as the many fish traps, old stone caches and tent rings around the bay. Char fishing is also excellent.

The community of Pelly Bay has the most attractive setting in the eastern side of the region. Arriving by air, it is intimately placed on the shores of St. Peters Bay at the mouth of the Kugajuk River. One of the reasons for the preservation of the traditional lifestyles in Pelly Bay has been the relatively late arrival of “government programs”, in 1961.

The community’s stone church is one of the most beautiful examples of architecture in the coastal arctic. Built in 1935 by Father Henry, this building is both a photographer’s delight as well as a stunning visual example of the long time influence of the "R.C. Missions" in the development of the north. Pelly Bay then offers one of the best environments to get a full sense of the traditions, history, and development of the north. Storytelling, fishing and sealing in the midst of a modern hamlet office and DEW Line Station express how two worlds have met; yet the integrity of the areas indigenous peoples has remained intact.

Pelly Bay is also accessible from the east via Repulse Bay and Hall Beach enabling same day connections, once a week with Montreal. This new link may eventually reduce the cost of living in this community.

6.2.7 Bathurst Inlet/Bay Chimo Destination Area

The Bathurst Inlet planning unit extends from the north, at the mouth of the inlet (Jameson Island) to the south of Bathurst Lake and the mouth of the Western River and approximately 50 km on either side of the inlet. The area has been recognized by the Canadian Committee for the International Biological Programme (IBP)(4) as an area of high biological, and historical importance in the North that requires special protection(5).

As well, Parks Canada has selected it as one of the six "Natural Areas of Canadian Significance" which are areas which have been identified for preservation in a natural state and are representative of the major natural environments of Canada.

The area has been selected by the two agencies because of the variation in landscape, and scenic values rarely found on the Canadian Shield. It posses a great diversity in landscapes from the. flat, gently rolling, drift covered uplands of the southwest to the steep rocky hills south of the James River.

The planning unit also includes the majestic Wilberforce Falls where the turbulent waters of the Hood River fall in a double channel over a 50 meter precipice in the Wilberforce Hills. The falls, which were named by Sir John Franklin, are as high as Niagara Falls and presented an unsurmountable obstacle to him on one of his many herculean geographic expeditions to map the Arctic coastline.

The destination area is serviced by the internationally famous Bathurst Inlet Lodge which the owners claim has a 25% repeat visitation.

"Bird watchers, botanists, artists and history buffs find beauty and knowledge here at the edge of the polar region. Some guests return again and again...''(6). Visitors are afforded a great array of wildlife including over 90(7) species of birds, barren-ground grizzley, Arctic fox, muskox and at times the presence of the 100,000 population Bathurst Caribou Herd. Guests may also encounter the traditional ways of the people of the area either at the lodge or at Bay Chimo (Umingmakatok) at the north end of the inlet. The planning unit is not served by scheduled aircraft, which accounts for part of its special quality, but is accessible from both Yellowknife and Cambridge Bay by charter.

REFERENCES

(1) Neither exact numbers nor visitor origins are available, yet interviews with RCMP detachment would suggest approximately 100 users in 1983.

(2) "The Curse of Neovitcheak", Learmonth, L.A., "The Beaver", September, 1946.

(3) Field and Stream, October, 1982.

(4) "Ecological Sites in Northern Canada", Canadian Committee for I.B.P., Conservation Terrestrial - Panel 9, Ottawa, 1975.

(5) "Bathurst Inlet - A Natural Area of Canadian Significance", Parks Canada - Department of Indian and Northern Affairs, Ottawa, 1978.

(6) "Barrens' vast sweep abounds with wildlife", by Richard Barrington, the Globe and Mail, June 23, 1984.

(7) Bathurst Inlet Lodge promotional literature.

7. TOURISM RESOURCES

7.1 OVERVIEW

Tourism resources include those features that attract people to a region and those that provide services once they have arrived. The latter usually emerge because certain natural or cultural resources created a draw. The lifestyle of the Inuit people the unique Arctic resources are the main reason for pleasure travel to the Arctic Coast Region and there are a number of services that complete the visitor experience. However it is apparent that many of the services have established more as a response to the government and business traffic rather than the demands of the minor tourist flow. The tourism plant is therefore very small and very specific and includes a hotel and one or two outfitters or tour operators per community as well as a half dozen camps lodges and outfitters throughout the region.

The reason for the small number of tourism facilities is as follows:

- a very low tourist volume most of which is concentrated in the short summer months and only affecting a few communities (e.g. Coppermine, Cambridge Bay);
- a previous lack of interest in tourism in several of the communities (e.g. Spence Bay);
- a relatively recent awareness of tourism as an economic generator and creator of jobs; and
- a general lack of tourism organization and marketing.

Nevertheless the vast Arctic landscape, the fascinating cultural heritage of the Inuit people, the history of the early explorers and the exceptional fishing resources have consistently brought approximately 1,000 people to the region each year. For the most part they have been well serviced by the existing infrastructure and tourism facilities and there has been a growing understanding of their needs by the native people.

The following text then, outlines those community-based facilities/ activities that exist and indicates their ability to meet the requirements of the existing and potential travelers.

They will be listed according to the seven planning units or "community-based destination areas". This will enable the document to be useful to the industry operators, local residents and politicians in each of the communities.

The inventory/analysis will be classified according to the following tourism component groupings:

Accommodation/Food Services;
Attractions;
Tour Operators;
Recreation Facilities;
Events and Festivals;
Retail and Arts and Craft Services;
Native Skills; and
Tourism-related Organizations.

7.2 HOLMAN DESTINATION AREA

7.2.1 Accommodation/Food Services

The Arctic Char Inn is an attractive eight room co-op hotel (accommodating 20) that provides adequate meals in an attractive eating area overlooking the bay. While the present rooms satisfy the existing demand, increased tourism in the summer season, when the hotel lodges construction workers, would require additional accommodation units. It has been used by about 6 groups per year for conferences. Additional accommodation is provided in individual homes by billeting visiting friends and relatives.

Tent shelter is provided to big game hunters when outside the community.

Food service is typical of Arctic communities and interviews with frequent users and tourists suggest that it is adequate and meets existing demand. However, increased tourism to the region will require more imaginative food preparation -- especially of local/ traditional foods. The food preparation course provided by the CO-OP throughout the region, have been successful in greatly improving overall quality diversity and presentation; but the pleasure and business traveller will want more diversity, increased use of char and caribou, higher quality preparation, and fresher vegetables.

7.2.2 Attractions

The destination area has a variety of natural and cultural attractions not found in other communities.

Community

Holman Historical Society Museum

The collection of museum artifacts adjacent to the printshop, is the most complete in the region; including antique clothing, spears, knives, bowls, lamps etc. The collection has been catalogued yet it lacks the display facilities to make an official museum. The existing storage area (adjacent to the printshop) could temporarily be established by setting up as a museum; however, the future construction of either the new multi-purpose hall (to be built this year), or the proposed hamlet office (1986), should consider a museum facility if an independent facility cannot be constructed.

- Holman Eskimo Co-op Printshop

The prints that have been created in this printship, over the past 15 years, have an international reputation largely due to the works of artists such as Helen Kalvak. Their vivid lithographs of Arctic life have brought the legends and the life of the Inuit people to those southerners eager to understand the life and history of northern cultures. The skills were brought to the community by Father Henri Tardi in 1939. Watching the artist at work provides a fascinating attraction to visitors.

Sales are also made at the printshop where the tourist has the unique opportunity to purchase a work of art on the same premises as the artist. However, here as in other co-op facilities throughout the Arctic, prices are not significantly cheaper than in the south (approximately 15%). If a pricing policy was established for tourists to the community it could have a positive impact on increased sales and visitation.

Holman Eskimo Co-op Craft Shop

Unlike the printshop, mass production is more obvious in the craft shop. Thousands of silk screen products, with the famous forms of Kalvak, are produced annually. However, more delicate and individual sculptures, parkas and inlaid sealskin cushions can also be purchased. New management would seem to suggest that the printshop and craftshop could be merged. As well, the pricing policy should be more competitive with southern markets and even Yel lowknife.

- Polar Bear Hunts

Twenty polar bear tags are also shared with Sachs Harbour every two years, and this has made these communities the most popular for hunters in the NWT. 100% success rates are very frequent. This hunting potential is also auqumented by the 40 muskox tags and the Perry Caribou quota.

The Hunters and Trappers Association is responsible for organizing the hunts which contribute a substantial income to certain individuals in the community (approximately $2,500/guide/bear). These $15,000 to $20,000 hunts appeal, in general , to American big game trophy hunters who in the future will book through the local wholesaler - COPE'S "Guided Arctic Expeditions". Hunters tend to spend approximately two nights in the community, depending on flights, and although some purchase several hundred dollars on craft, others spend nothing.

7.2.3 Tour Activities

7.2.3.1 Site Attractions

A number of interesting sites exist in and around the Diamond Jennesse Peninsula that can readily be included in a community-based tour. "They include:

- Okpilik and Airforce Lakes

Both features are within a short three-wheeler drive or a reasonable hike from Holman. The area can be used for fishing, picnicking, hiking and camping. A picnic area and BBQ sets can also be found along the way to these facilities.

- Outpost Camps

The Kuuk River, the lake system of the Kuujjua River and Minto Inlet all provide opportunity for the development of fishing and naturalists outposts for such activities as char and trout fishing.

- Nowyat Camp Archeological Site

Research, until summer 1984, was conducted by the French Government on this former Thule camp. However a fire virtually destroyed all the accumulated research data and future exploration is uncertain. Nevertheless it is within a one day boat ride and consequently offers opportunity for interpretation of a Thule Village.

- Minto Inlet

The features of this inlet are accessible by both water and land. Attractions include tent rings, fishing and birdwatching areas as well as viewing the only willow grove to be found at this latitude.

7.2.4 Tour Operators

Kingalik Tours is the only private outfitter in the community. The operator owns a boat and plans to acquire 6 three-wheelers which will respond to immediate and short term demand. There are also many additional privately owned boats as well as approximately 20 dog teams which can be used for a variety of tour packages and small guided tours including:

- fishing;
- seal viewing and hunting;
- tours of the town;
- visits to historic sites or points of interest, e.g. old inukshuks at Walker Bay;
- sightseeing, birdwatching; and
- muskox viewing and hunting.

1.2.5 Recreation Facilities

The hamlet has an older yet functional community hall which can be used for larger gatherings. Uluhaktok Elihavick School has four class rooms and can also he used for community activities.

7.2.6 Festival/Events

The Kingalik Jamboree is a three day local festival, in June, that features seal skinning, bannock-making and other native games. It is held during an ideal season to attract the pleasure traveller and if it included an event such as a National Inuit Craft Show, it could appeal to southern arts and craft markets.

7.2.7 Retail and Arts/Craft Shops

The Bay is the major retail outlet but arts and crafts are sold only at the Co-op printshop and craftshop.

7.2.8 Native Skills

Holman receives relatively few tourists on an annual basis, yet a number of individuals possess the skills to take visitors out on the land or water. The involvement of the Hunters and Trappers Association has assured a certain growth in the skills of Polar bear guides. As well, Kingalik tours is associated with a number of capable individuals with boats and dogteams. Nevertheless more skill development is required in the area of tour organization, interpretation, food preparation, etc.

7.2.9 Tourism Related Organization

Although there is no official tourism association, the Hunters and Trappers Association and the Holman Recreation Committee both provide service to tourists. A tourism committee was formed, but as of June 1984 it was no longer functioning.

7.3 COPPERMINE DESTINATION AREA

7.3.1 Accommodation/Food Services

The Coppermine Inn is under new management and ownership and offer excellent service, hospitality and homecooking. This private sector facility accommodates 40 in 22 rooms and 5 A-frames. An expansion and upgrading program is underway including the addition of flush toilets which will bring the property to the level of the newer CO-OP hotels. The facility is ideally located close to the shores of the Arctic Ocean and the mouth of the Coppermine River.

Tourists represent only 5% of clients. 1984 occupancy rates were 90% (due to construction workers) during the summer and were expected to stay high during the fall. However, like most northern hotels, it was anticipated to fall below 30% during the winter including many nights of no occupancy.

7.3.2 Attractions

Natural attractions are among the most important features with the nationally known Coppermine River attracting many people to this destination area.

7.3.2.1 Coppermine River

This river provides exciting and challenging canoeing and rafting for those seeking a true wilderness experience. Many canoeists select Redrock Lake or Point Lake to start their 400 km journey to the Arctic Ocean.

Their trip provides the rare opportunity of slowly passing through Canada's treeline and crossing 66 30'N parallel which marks the Arctic Circle.

The excursionists are treated to a cast of thousands of birds as well as muskox, arctic fox, caribou and barren-ground grizzly which are seen in the months of June and July. Birdlife is abundant during the entire summer months. 20 km (12 mi) before reaching the mouth of the River, the traveller passes the historic Bloody Falls. This site is also accessible by motorboats from Coppermine, however during the period from mid August to freeze up the last kilometer is shallow and fast flowing requiring a guide to reach the falls. Nevertheless it is an easy hike along the shoreline to the base of the falls.

The visitor is treated to an exceptional experience in early September when the Arctic char are making their way up the falls.

7.3.2.2 Tree, Kendall and Richardson Rivers

Coppermine is the staging area for both of these mighty rivers which offer abundant fishing and canoeing opportunities. The Plummer Lodge has fishing rights to the Tree River.

7.3.2.3 Arctic Ocean and Coastline

Coppermine is the closest point to Yellowknife where the northern visitor can visit the high north above treeline. It is only 600 km from Yellowknife and offers a rare opportunity to visually and physically experience both the Arctic and the Arctic Ocean/Coastline. Sand Beaches, off-shore islands, rock formations, deltas and hunting camps combine to provide variety to any inshore boat tour - especially if combined with a trip to Bloody Falls and excursions on the tundra.

7.3.2.4 Peterhead Boats or Longliner

Although not presently an attraction, the availability of at least one of these boats for local tours represents a unique potential attractions. Their restoration would be a welcomed addition to Coppermine's water-based tourism opportunities as discussed in 7.3.2.3. Unfortunately, existing government policy does not allow the government boat to be used for tours.

Mouth of Coppermine Viewpoint

The rock promontory, directly to the east of the hamlet and overlooking the mouth of the Coppermine River, offers an excellent site for a small, interpretive theme attraction. Views are available to the cementary, former airstrip, Coppermine River mouth and valley, the hamlet and surrounding landscape.

7.3.3 Tour Operators

There are no tour operators in Coppermine although a certain interest has been shown by individuals in the community. The available natural resources suggest that four types of tours could be developed:

a) Arctic Coastline Tour including Bloody Falls (l-2 days);
b) Trips to Tree or Richardson River (l-2 days);
c) Hamlet of Coppermine and surrounding landscape (1 day); and
d) Hudson's Bay Company Tour Including Bernard Harbour (l-2 days).

Any variation on each or combination of the four tours is possible suggesting a three to seven day stay in the Coppermine Area.

Boats, snow-machines and 3 dog sled teams are available.

Tours could be sold to three markets; tourists coming from Yellowknife for a taste of the Arctic, anglers coming in from their fishing trip on Great Bear Lake and canoeists from the Coppermine River.

7.3.4 Recreation Facilities

The Coppermine Recreation Center and Arena is one of the largest facilities of its kind in the region and can be used for large gatherings and special events. There is also a larger community space in the Kugluktuk School gym.

7.3.5 Festivals/Events

The community spirit, so evident in the volunteer labour that built the Recreation Center, is also displayed in the three special events held by the community.

- Easter Games
- Christmas Games
- Natik Frolic (in May)

The Easter and Christmas games have been responsible for Coppermine producing some of the finest athletes in the Arctic. Their skills could be of interest to tourists, beyond the period of the competitions, as entertainment and examples of typical Arctic games.

Natik Fro' ics features ice jigging, traditional games and snowm.bil - ing.

7.3.6 Retail an(Arts/Craft Sales

Like many communities, Coppermine produces fine soapstone carvings from material found nearby on the Rae River. The community is even better known for its native copper artifacts, using local materials, and the typical "Mother Hubbard" parkas. They are available at the Coppermine Eskimo Co-op which has recently renovated its facilities. Other retail services are available at the Bay.

7.3.7 Native Skills

Although Coppermine receives a proportionally larger number of tourists than some other communities they have not had a significant impact in developing native hospitality skills. Canoeists from the River rarely stay long because of lack of available activities. However, if accommodation/events packages were prepared for the southern wholesalers, canoeists could potentially stay longer. Charter flights from Great Bear only stay long enough to visit the CO-OP. There is no local outfitter. In summary then there has been little opportunity to develop tourism related skills. Nevertheless, the Adult Education program has shown interest in developing these skills in Coppermine. Positive action could result in the establishment of a hospitality centre in this community.

7.3.8 Tourism Related Organization

There is no organization responsible for tourism. There has been discussions of the formation of a Chamber of Commerce, which could initiate a tourism organization, but there have been no recent meetings.

7.4 CAMBRIDGE BAY DESTINATION AREA

7.4.1 Accommodation/Food Services

The Ikaluktutiak Hotel is the largest CO-OP hotel in the region offering 20 rooms, for 40 people, as well as a large meeting/ convention room. Meals are of a high quality. Smaller meals are available at the Cabana Restaurant.

7.4.2 Attractions

7.4.2.1 Cambridge Bay Community

The largest community in the Central Arctic, Cambridge Bay, as an attraction itself, can demonstrate many of the facets of technology, communication and adininistration in a Canadian Arctic community. Massive fuel reservoirs, nursing station, the DEW line site, variety in housing styles, sea-lift, water supply and waste disposal combine to demonstrate the unique requirements of surviving in the north. Cambridge Bay also has the only commercial fish processing plant in the Kitikmeot Region, and it has already proven popular with business/ pleasure travelers. The community also demonstrates contact between the inuit and non-native cultures.

7.4.2.2 R.C. Mission Church

Across the harbour is located one of the few stone buildings in the Central Arctic. It is presently being considered as a museum as a result of the actions of the Arctic Coast Tourism Association and the Hamlet Council.

The attractive siting, the variety of available local artifacts, and the impressive structure could make this building the first museum of its kind along the Arctic Coast. The remains of the "Maud" is locked in the icy harbour waters nearby and an old longliner, "Eagle", rests on the beach. The addition of a semiauthentic restored "Maud" and "Eagle" would greatly add to this historic attraction. The National Historic Site and Monument Board is looking throughout the territories to install plaques -- specifically to commemorate "white mans deeds".

7.4.2.3 High Arctic Lodge

This is one of the more respected fishing camps in the Central Arctic. It is located 138 km northwest of Cambridge Bay and outpost camps are located on the Nanook River. It is open for July and August and can accommodate up to 12. It attracts between 75 and 100 visitors per season, most of whom come from the U.S.A. and Ontario. Although visitors go through Cambridge Bay on their way to the camp the facility has little economic impact on the community.

7.4.2.4 Fishing Lodge

A second lodge is located north of Cambridge Bay but it has not been operating since 1981.

7.4.2.5 Mount Pelly

This 210 m high mountain is very significant by coastal Arctic standards and consequently constitutes an important natural attractions. As well, access is available to the site by truck, 4 x 4, or three wheeler. The climb to the top features excellent views over the lakes and tundra of Victoria Island and Arctic flora and fauna are abundant.

7.4.3 Tour Operators

Sites of interest for tours include the proposed Museum, Meteorological station, DEW Line, Mount Pelly, Japanese Monument, Spring Camps and of course the many excellent char fishing spots along the coast. There are other features that could express life in this northern community including the wind generator, the NCPC waste heat use system, the upper air station, etc.

7.4.3.1 Kitikmeot Arctic Tours

Kitikmeot Arctic Tours offers tours throughout the Cambridge Bay Destination Area including fishing, hunting, photography and bird watching. Guides are available yet business is spardoic due to fluctuations in tourist flow. The company was able to adequately respond to the influx of visitors during the recent visit of the Linblad Explorer in Cambridge Bay.

7.4.3.2 Ikaluktutiak Co-op Hotel Expeditions

The co-op has previously organized tours in the destination area. As part of the co-op system, it could potentially sell these tours in Yellowknife.

7.4.4 Recreation Facilities

7.4.4.1 Community Hal'l

This facility is one of the smallest in the region, accommodating only 200 andis in need of renovation.

7.4.5 Festival/Events

The major event in Cambridge Bay is the Umingmuk Frolics held in May. Snowmobile races are held in the bay while broomball and a variety of Inuit games are held around the community.

7.4.6 Retail and Arts/Crafts

Two outlets are available, the Bay and the Co-op store. The CO-OP (Northern Images) has the largest and most diversified Arts and Crafts collection in the Arctic Coast specializing in Northern prints, hangings, large soapstone carvings and a collection of traditional clothing.

7.4.7 Native Skills

A number of businesses such as the Ikaluktutiak Co-op and Kitikmeot Arctic Tours as well as guide-training courses have enabled a few local people to develop certain hospitality skills. More training, is however, necessary.

The various local contracting firms employ unskilled labour and there are no native journeymen.

7.4.8 Tourism Related Organization

7.4.8.1 Local

Like other communities, both the Eskimo Co-op and the Hunters and Trappers Association are involved in developing certain aspects of tourism. There is a need however to identify a group that would be responsible for all aspects of the Cambridge Bay travel product. If a Chamber of Commerce develops, this may become their responsibility. The Arctic Coast Tourist Association presently assumes this responsibility however as regional demands increase it will have to serve its first (region wide) mandate leaving the promotion of Cambridge Bay to a local organization.

7.4.8.2 Regional

Cambridge Bay is the center of the Arctic Coast Tourist Association as well as the base for the Regional Tourism Officer. Consequently, tourism expertise is higher in this community than in other locations. If Cambridge Bay was to become an important staging area for the region this travel expertise would be advantageous.

7.5 GJOA HAVEN DESTINATION AREA

7.5.1 Accommodation/Food Services

Visitors to Gjoa Haven stay in the new and tastefully furnished six-room Amundsen Hotel. There is an attractive dining area overlooking the bay and meals are prepared by a cook who has been trained at the Dew Line Station.

7.5.2 Attractions

7.5.2.1 The Community

In 1984, the Linblad Explorer visited what Amundsen called "the finest little harbour in the world" as part of this cruises' interest in the Northwest Passage Expedition and cultural lifestyle of the Inuit people. Discussions with passengers indicate that the contact with the native people was an important part of their cruise experience and Society Expeditions will be contacted to assess their interest in returning. Carving, native games, local fishing and storytelling add life and vitality to the austere landscape that surrounds the hamlet.

7.5.2.2 Chantry Inlet

Chantry Inlet is a large indentation in the Arctic coastline just south of the Adelaide Peninsula. Unlike the flat landscape of the Gjoa Haven Area, the inlet is surrounded by rolling hills and reck outcropping.

The Inlet's extraordinary fishing resources gained international exposure recently (1982) when the popular sporting magazine, "Field and Stream", published a 3 page article on Chantry Inlet Lodge. Writer Ken Schultz called it "the experience of a lifetime. . . in one of the hemisphere's most remote spots".

The Chantry Inlet lodge is located on the Back River near Whirlpool Falls. Anglers are able to fish both char and trout at the same time and trout reaching an incredible 35 to 40 pounds have been caught. Fly-in fishing, to Franklin Lake is also available.

The Lodge is of particular importance to Gjoa Haven because its owners have indicated an interest in selling a portion of the facility to the residents of Gjoa Haven.

Opportunity for local Inuit employment seems possible and many have already gained experience as guides. The resulting advantages to the Destination area would be numerous since the facility has proven to be financially viabile during the two month fishing season.

The site is approximately 175 km from Gjoa Haven and can also be accessed from Baker Lake (325 km).

7.5.3 Tour Operators

There is no official tour company however through the Tourism Committee it is possible to assemble the requirements of either a water based or land based tour. As one committee member mentioned, "Just tell us when you are coming and we will be ready". There would seem to be the capacity to serve a group of approximately 20.

Tours, with or without experienced guides, would include: birdwatching, igloo construction, skidoo and dog sled rides, fishing at Chantry Inlet or Richardson Point, seal hunting, and entertainment such as drum dancing.

There are presently 40 muskox and 12 polar bear tags so big game hunting is possible, especially with the high quality and numerous dog teams.

7.5.4 Recreation Facilities

There is an existing community centre that will soon be replaced by a spacious modern facility that will accommodate large groups. The school also has meeting rooms.

7.5.5 Festival/Events

There is no recognized festival in Gjoa although Inuit games are held in May and there is much dog sledding activity in April with the 20 dog teams in the community. This large number of teams could be the focus for a future festival as well as tourism travel between Gjoa Haven and Spence Bay.

7.5.6 Retail and Arts and Crafts

The Bay and a small Co-op Store provide retail services. Crafts are available at the Kerkertak Cooperative as well as Kakivick Crafts in the hotel.

7.5.7 Native Skills

Lack of tourists to this community has made it difficult to develop specific hospitality skills.

However a number of residents have gained valuable experience working as guides at the Chantry Inlet Lodge and two guide training workshops have been held. The area has also proven to have one of the highest levels of enthusiasm and the local Tourism Association provides opportunity for tourism related discussions and information transfer.

7.5.8 Tourism Related Organizations

Gjoa Haven was the first community to have established a local tourism association. They have been active in identifying development opportunities and are capable of putting together the necessary manpower and equipment (boats, sleds, etc.) to respond to tour requests.

7.6 SPENCE BAY DESTINATION AREA

7.6.1 Accommodation/Food Services

The Paleajook Hotel lacks the quality of accommodation and service found in other facilities in the region. There are 4 rooms lodging 10 people and meals are served in a small area adjacent to the kitchen.

Although the property requires extensive upgrading of sanitary, lounge and kitchen facilities it is still essential to the tourism industry, as it is the only available accommodation.

7.6.2 Attractions

The Spence Bay Destination Area is one of the largest in the region and includes the entire southern part of the Boothia Peninsula which is the northern most tip of the North American continent. The landscape of this zone is remarkably diverse ranging from the relatively flat topography around Spence Bay to the very rugged uplands terrain of the Bellot Strait.

Fort Ross is the secondary cultural attraction in the destination area and overland'or water route trips may be made from Spence Bay. The northern part of this peninsula is a concentration area for marine mammals and a feeding site for sea birds because open water pools remain throughout the winter. Spence Bay and area have a number of attractions including:

combined Netsilik and Cape Corset culture;
- small museum in the school;
attractive Hudson's Bay Company buildings;
- old stone R.C. Mission church;
- Taloyoak Craft shop and sewing center;
- excellent opportunities for fishing, birdwatching, hiking;
- snowmobiling;
contact with John Ross and Franklin Expedition Route;
- local caribou blinds, tent rings; and
- whale watching in the Bellot Strait and Creswell Bay.

The 12,300 sq. mi. Boothia Peninsula, is the dividing line between the Eastern and Western Arctic, and provides the most visually dramatic landscape outside of Bathurst Inlet.

7.6.3 Tour Operators

There are no local tour operators, or experienced tour guides. Nevertheless there are some exciting touring opportunities including:

- tracing the Franklin Expedition; and
- tours to Old Fort Ross, Tom Bay and old Mission.

There are also ample opportunities for fishing on the local lakes such as Nitsilik, Middle and Lady Melville as well as the excellent char fishing of Willersted Inlet.

7.6.4 Recreation Facilities

There is a community hall and the facilities of the school are available for demonstrations, entertainment Char dinners, etc.

7.6.5 Festivals/Events

There are two major social/cultural events:

- Christmas to New Years; and
- Spring Carnival (1 week long)

The former is centered on all night indoor games, drum dancing and feasts while the latter is more outdoors with fishing and sealing contests, food races and igloo making contests.

7.6.6 Native Skills

Some locals have been trained as guides; however as with other communities there is a need for more intensive training. The H.T.A. has shown interest in getting involved and young people could be used as guides within the community.

7.6.7 Tourism Related Organization

A newly formed tourism committee includes local residents, as well as representatives from the Hunters and Trappers Association.

7.7 PELLY BAY DESTINATION AREA

7.7.1 Accommodation/Food Services

The Pelly Bay hotel is a modern facility on an excellent site overlooking the bay and islands. It accommodates 18 in 6 properly furnished rooms. It is operated by the Koomiut CO-OP Association.

7.6.2 Attractions

7.6.2.1 R.C. Mission Church

The stone church, made from locally quarried stone, is one of the finest cultural attractions in the region. Its architectural form contrasts sharply with the surrounding landscape as well as the homes of the adjacent community. The facility was built by Father Henry, an oblate missionary, and therefore is a historic feature in itself. It is presently used to store Inuit artifacts made as part of a Cultural Inclusion course. Discussions have already taken place that could turn the facility into a museum. The missionaries also built an impressive cross with discarded oil drums, that sits overlooking the community.

7.6.2.2 Pelly Bay

The Bay holds attractive opportunities for nature, culture, fishing and hunting expeditions. Many seals can be seen in the bay and char fishing is excellent. As well, there are numerous historic or archeological sites. The new nursing station and hamlet office are particularly noticeable because they contrast with the rest of the hamlet.

Pelly Bay is one of the most scenic communities in the region and provides ample opportunity for the photographer and naturalist.

7.6.2.3 Community Tours

Due to Pelly Bays' high scenic value, tours in and around the community can be very interesting. Walks to the nearby inukshuks, the surrounding hills, and even the debris and scrapped airplane fuselage left by the U.S. Air Force is of interest.

7.6.3 Tour Operators

Arctic Paradise Tours is the only outfitter in the area and low levels of visitation have made the operation difficult. Yet despite the high cost of getting to Pelly Bay from Yellowknife, it is now accessible from both the east and west. First Air has a scheduled flight, one day a week from Hall Beach, which connects to the southern routes of Eastern Canada. NWT air has also commenced a one day a week flight that provides same day travel to Montreal via Nordair. Calm Air have also applied for service.

Tour opportunities are plentiful and include:

- Community and environs;
- Pelly Bay to Harrison Island;
- DEW line site;
- archeological sites around Pelly Bay shoreline;
- Big Flood Legend site for tent rings and old stone caches; and
- char fishing on Pelly Bay

Pelly Bay also has 15 polar bear tags, some of which could be used for sport hunting.

7.6.4 Recreation Facilities

The new Hamlet office and community hall is one of the finest in the Arctic Coast. A new school is scheduled for construction in 1986.

7.6.5 Festivals and Events

One festival is held on Canada Day. It is highlighted by harpoon throwing contests, traditional games and a large outdoor banquet.

These talents could combine with storytelling, carving display, etc., could provide a variety of entertainment for the tourist.

7.6.6 Retail and Arts/Craft Shops

Pelly Bay is noted for its famous wall hangings as well as miniature ivory carvings both of which are available at the well stocked Kramanarquq Arts and Craft Shop. There is no Bay store - all retail items are available through the Koomuit Co-op which satisfies the basic needs of the community.

7.6.7 Native Skills

Low visitation has not allowed the local residents to develop any expertise in tourism. However there are a few individuals who are aware of its development potential and are interested to see it evol ve. The Hamlet council is particularly enthusiastic about tourism growth.

7.6.8 Tourism Related Organizations

There are no tourism related organizations.

7.7 BATHURST INLET/BAY CHIMO DESTINATION AREA

7.7.1 Accommodation/Food Service

Bathurst Inlet Lodge is a well known naturalist facility that has gained an international reputation over the past decade. Using the buildings of a former Hudson's Bay outpost, a private operator has established facilities for 18 people close to the Burnside River. The operation is well respected for its hospitality and home cooking. The only accommodation in Bay Chimo is two bedrooms in the store.

7.7.2 Attractions

7.7.2.1 Bathurst Inlet Landscape

The terrain around the Inlet consists of flat tundra, rolling hills and rugged uplands. The inlet itself is bordered by steep sea cliffs and many islands, including the dramatic Quadyuk Island. Approximately 13,000 sq. km have been identified by Parks Canada as an area of national significance. There are also numerous lakes in the surrounding landscape.

7.7.2.2 Wilberforce Falls

The falls are the highest in the world, north of the Arctic Circle. They are a short flight or a major hike from Bathurst Inlet Lodge.

7.7.2.3 Bay Chimo

The community of Bay Chimo has adopted few of the southern services of other Arctic communities', consequently, it is still a very authentic expression of Inuit culture. The commun·ties' 90 residents have maintained their traditional ways and are committed to preserving their values.

7.7.2.4 Flora/Fauna

Bathurst Inlet has frequently been described as a naturalists paradise. Lichens, dwarf willow, and many flowers colour the tundra in Spring, and virtually every major arctic mammal species roam the area in great numbers.

The most impressive feature is the 100,000-strong Bathurst Caribou Herd.

7.7.3 Tour Operators

The Bathurst Inlet Lodge offers a variety of tours serving its approximately 100 guests, to various attractions including:

- boating on the inlet;
- air excursions to Wilberforce Falls;
- naturalist guided hikes on the tundra; and
- trips to Bay Chime.

7.7.4 Recreation Facilities

There is no community hall in Bay Chimo but the school room is used for meetings.

7.7.5 Festivals and Events

There are no official events', however, regular demonstrations of

Inuit peoples' entertainment are available at the Lodge.

7.7.6 Retail and Arts/Crafts Shops

Bay Chimo has a retail store and arts and crafts may be purchased from local craftspeople enabling buyers to negotiate prices that can be as much as 50% cheaper thah the co-op.

7.7.7 Native Skills

Despite its isolation many tourism related skills have been developed, due to the presence of the Bathurst Inlet Lodge.

7.7.8 Tourism Related Organization

There is no tourism-related organization.

Figure 7.1 TOURISM RESOURCE INVENTORY

1. Holman Destination Area

Component	Name	Facilities	Rating
Accommodation	Arctic Char Inn ($80. 00/day)	8 Rooms 20 guests dining area	****
Attractions	Historical Museum Co-op Print Shop Co-op Craft Shop Polar Bear Hunts Kingalik Jamboree		* *** *** ***** ***
Services	Kingalik Tours	Boats Three Wheelers Rentals	
	The Bay Holman Eskimo Co-op Community School Community Centre		

2. Coppermine Destination Area

Component	Name	Facilities	Rating
Accommodation	Coppermine Inn ($80.00/day)	20 rooms 40 guests 5 A-Frames Dining Room	****
Attractions	Coppermine River River/Coastal Tours Tree River Co-op Craft Shop Natik Frolics Christmas Games Easter Games	Boats (no rentals)	***** *** ** ** ***
Services	The Bay ~~Eskimo~~ Co-operative Recreation Centre and Arena		 *****

* Acceptable
** Good
*** Quality
**** Good Quality
***** High Quality

NOTE : These are comparative ratings and only apply with the Region. They are based upon the judgement of the consultant and take into consideration such factors as general ambiance, distinctiveness, quality of food, cleanliness and the facility’s design relative to its setting.

3. Cambridge Bay Destination Area

Component	Name	Facilities	Rating
Accommodation	Ikaluktutiak Hotel ($80 .00/day)	20 rooms 40 guests dining room meeting room	*****
	High Arctic Lodge	12 gue ts	*****
Attractions	R.C. Mission Church	future museum	****
	Mount Pelly		***
	DEW Theme Site	no pub" ic access	*
	Meteorological Station		**
	Fuel Farm		**
	Japanese Monument		*
	Umingmuck Frol ics		****
Services	They Bay		
	Ikaluktutiak Co-op		
	Community Hall		
	Thunderbird A.C.		
	Centennial Library		
	Community School and Playground		
	Community Centre		
Information	Arctic Coast Tourist Association		

4. Gjoa Haven Dest nation Area

Component	Name	Facilities	Rating
Accommodation	Amundson Hotel ($80 .00/day)	6 rooms 12 guests	****
	Chantry Inlet Lodge	12 guests	*****
Attractions	Back River Fishing		*****
	Dog Teams	(no rentals)	**
Services	The Bay		
	Kokertak Co-op		
	Community Hall (under construction)		*****
	Community School and Playground		

5. Spence Bay Destination Area

Component	Name	Facilities	Rating
Accommodation	Paleajook Hotel ($80 .00/day)	4 rooms 10 guests	*
Attractions	Old Fort Ross	(no rentals)	****
	Boothia Peninsula		***
	Stone Church		**
	Taloyoak Craft		****
Services	The Bay		
	Paleajook Co-op		
	Community School and Playground		

6. Pelly Bay Destination Area

Component	Name	Facilities	Rating
Accommodation	Pelly Bay Hotel ($80 .00/day)	6 rooms 18 guests	****
Attractions	R.C. Mission Church		*****
	Ivory Carvings		***
	Wall Hangings		*****
	Traditional lifestyle		*****
	Nursing Station		*
	Hamlet office		**
Services	Koomuit Co-op		
	Kramanarquq Crafts	boat rentals	
	Arctic Paradise Tours		
	Community School and Playground		

7. Bathurst Inlet/Bay Chimo Destination Area

Component	Name	Facilities	Rating
Accommodation	Bathurst Inlet Lodge ($120.00+/day)	20 guests	*****
Attractions	Wilberforce Falls		*****
	Flora/Fauna		*****
	Inuit Lifestyle		*****
	Burnside River		***
	Bay Chimo Community		****
Services	Retail Store		
	Community School		

8. TOURISM ACTIVITIES

Tourists are drawn to a region for more than just the scenic beauties and natural and cultural attractions. They also want to participate in activities and have certain types of experiences. In fact, it is those unique and exciting experiences that are most frequently remembered by travelers.

A well balanced northern tourism development would combine a comprehensive and integrated selection of.

- land-based activities;
- water-based activities;
- ice-based activities; and
  community-based activities

Because the Kitikmeot Region is coastal and also laced with numerous rivers, there is ample opportunity for a balanced activity system. While actual participation rates are not available, interviews and market data suggest that certain activities are more popular than others.

Also, because much of the area, (land and water) lies in a frozen silence for most of the year, there are many opportunities for movement by snowmobile and dog sled.

The market opportunities of the various activities in each destination area is presented at the end of this chapter (Figure 8.1).

8.1 LAND-BASED ACTIVITIES

8.1.1 Sightseeing

This is usually the most popular activity in natural areas such as the Canadian Arctic. While the image, for many southerners is one of a frozen flat wasteland devoid of visual appeal, the spring, summer and fall are quite the opposite. The tundra is a dynamic and colourful ecosystem supporting hundreds of bird species, mammals and such abnormal creatures as the prehistoric looking muskox. The landscape forms are equally dramatic with Bathurst Inlet, in the middle of the region and Holman and Pelly Bay at either end, being the most visually exciting.

Hiking, all-terrain vehicle and fixed wing aircraft are the most popular way of seeing the arctic. Although there are very few designated trails, hiking on the rock can be relatively easy in many areas.

8.1.2 Hiking/Backpacking and Camping

This is unquestionably one of the best ways to experience the arctic environment and there is no limit to the length or challenge of possibilities.

Hiking is particularly interesting outside the community of Holman, Coppermine and Pelly Bay and backpacking and camping can be done in the Bathurst Inlet Destination Area, as well as the Boothia Peninsula and around Minto Inlet.

8.1.3 Hunting/Trapping

Hunting for muskox and polar bear is controlled by the number of tags available in each community.

For instance, Holman has 10 tags and shares 20 with Sachs Harbour every two years, and Pelly Bay has 15 polar bear tags which are used entirely by locals. There seems to be a trend to use the tags more frequently for sports hunting because of the greater amount of money left in the community. More tags will soon be available for muskox because of the increasing population.

Trapping with an Inuit is popular with some of the Government people who are visiting the communities.

8.1.4 Archeological/Historic Investigation

The coastline has a wealth of archaeological and historic sites that make interesting visits for history and Inuit culture enthusiasts. Until a recent fire, the French Government had been carrying out archeological digs close to Holman and the Creswell Bay Area has a wealth of Cultural Heritage sites. King William Island also has many sites relating to the Franklin Expedition.

Typical features of archeological interest are - Thule houses and villages, tent rings, stone caches, fish traps, and caribou blinds.

8.1.5 Nature Tours

The opportunity for arctic nature interpretation is abundant and Bathurst Inlet Lodge has capitalized on the outstanding resources of the Bathurst Inlet Destination Area.

In fact all destination areas have a wide spectrum of flora and fauna and with training each community could have local residents conducting guided nature tours.

Highlights of the tours include opportunity to observe arctic mammals (caribou, muskox, arctic fox, etc.), birdlife and flora.

The rockhound may also find a variety of rocks containing samples of minerals.

These tours may take place in boats, three-wheelers, both of which will require insurance and licensing.

8.1.6 Photography

The unique appeal of the arctic landscape, its vegetation and wildlife, midnight sun and cultural activities all provide a great variety of photographic opportunities to the professional and amateur.

8.2 WATER-BASED ACTIVITIES

8.2.1 Canoeing

Canoeing an arctic river is a challenging experience. The rivers are usually swift running, winding and pass through a variety of landscapes. For rugged adventurers seeking a pristine environment or the chance to follow the path of the explorers, Canada's arctic river systems offer an exhilarating experience.

Rivers providing this experience include the:

- Coppermine
- Hood
- Richardson
- Burnside
- Back
- Tree

8.2.2 Rafting

Rafting in Canada is becoming an increasing popular activity on those rivers that were once exclusively used by canoes. Rafts provide a relatively easier, relaxed and "group-type" activity which is rapidly becoming popular with several age groups. According to interviews, the Coppermine River now has almost as many people decending in rafts as in canoes. This trend is expected to increase and spread to other rivers such as the Burnside.

8.2.3 Coastal Boating

Each community has a variety of individual boats that can be used for traveling the bays, inlets and rivers adjacent to the community. Coastal boating may include - overnight trips to archaeological sites, camping, seal hunting, etc.

While some private boats may now be rented for small groups, larger boats will eventually be required for packaged tours.

At this point boats lack both insurance and fire protection an issue that must be resolved before tours can be promoted.

8.2.4 Fishing

There are unlimited fishing opportunities within close proximity to each community. Even the best spots are rarely more than a few hours away by boat. The Arctic also has some of the finest trout fishing rivers in the country. The Burnside, Back, and Tree, for instance, constantly yield 20 pounders. Chantry Inlet Lodge and High Arctic Lodge cater to anglers.

As the market study suggests, fishing is one of the most popular activities in the Northwest Territories and consequently an activity that should be promoted in each community in concert with the appropriate season.

8.2.5 Kayaking

Kayaking, particularly in protected coastal waters around Coppermine, Bathurst Inlet and Pelly Bay can be an exciting way to visit certain sites as an individual or small guided group. Package tours of 4-5 days, for instance, to the features along the 150 km coastline of Pelly Bay, not only introduce the traveller to the various archeological sites but respect the integrity of former Inuit travel modes.

8.3 ICE-BASED ACTIVITIES

To certain target markets as well as the steady flow of government and business travelers through the region, during the winter there are a variety of ice-based activities. They provide the types of programs that must be promoted to extend the tourist season with a particular emphasis on the months of April and May when the waters are still frozen yet the temperatures can be relatively mild and enjoyable for travel.

8.3.1 Spring skiing

While cross-country skiing, in mid winter, may be difficult to promote because of cold temperatures and hard snow, it can be an agreeable activity in the early spring months. This is a definite community- based activity since many of the features of each destination area are attainable within a days ski from the hamlet. For instance, one could ski from Coppermine to Bloody Falls, or out to Mount Pelley from Cambridge Bay, and return in a day. As well it is possible to overnight to such sites as Minto Inlet or to various historic sites along the shore of King William Island.

8.3.2 Snowmobiling

The snowmachine is the most appropriate ground transportation in the Arctic and each hamlet has many available machines. Again the spring months are the most appropriate and the opportunities for small group package tours are extensive. Although specific tours will be explored in greater detail in the master plan, a few typical snowmobile tours include:

5 day tour - Spence Bay to Old Fort Ross
2 day tour - Pelly Bay to Harrison Island
7 day tour - From Gjoa Haven around King William Island
2 day tour - from Coppermine to Bernard Harbour
4 day tour - Gjoa Haven to Spence Bay Return

The snowmobile when equipped with Komatik, then, is one of the most important ways of experiencing the various sites as well as linking certain communities.

8.3.3 Dog Sledding

This activity offers many of the same experiences as snowmobiling however, the distance travel led is not as great. Nevertheless, it is an exciting way to visit such sites as Minto Inlet, Bloody Falls, the east coast of the Boothia Peninsula etc. It is especially interesting for some when combined with seal hunting and igloo constructing and is also a way of traveling between Gjoa Haven and Spence Bay.

8.3.4 Igloo Construction and Winter Survival

The ability for the Inuit to endure and evolve a sophisticated culture in one of the harshest climates on the planet is a central theme to the interpretation of this indigenous peoples cultural heritage. The pleasure and business traveller has an opportunity to gain insight into the complex and ingenious survival skill and shelter construction techniques practiced by the people. Day and overnight trips by individuals or small groups can introduce the participants to hunting, fishing, trapping, traveling, cooking and igloo construction as practiced for the past 5,000 years.

8.4 COMMUNITY-BASED

The Northwest Territories have stated their support of community-based tourism and this study recognizes this approach as one of its prime objectives. Certain activities such as canoeing, hiking and snowmobiling only use the community as a staging area and although they have an important economic impact on the communities (equipment rental, hiring of guides, purchase of supplies, short-term accommodation etc.) they may not be as cost effective as those activities that keep the traveller, particularly those on business, in the community for a longer period of time. A comprehensive strategy requires a balance between community-based tourism and community-centered tourism. The following activities combine with the previous inventory of land, water and ice based activities to provide that mix.

8.4.1 Traditional Entertainment

Inuit entertainment is gaining wider recognition south of 60°. Music, singing and dancing, as they are still practiced in the community, provide excellent opportunities for evening entertainment, festivals, frolics or specific staged attractions. Native games, drum dancing, throat singing and storytelling can fill the tourists evenings, instead of television, and make the guest feel a part of the community.

8.4.2 Traditional Eating

The Arctic is a storehouse of meat, fish, fowl and berries, most of which is palatable to the southerners tastes. Even those foods that are not agreeable provide excellent opportunity for interpretation of the diet that has played an important part of the Inuit adaptation to the Arctic. Curing and drying techniques are also impressive. Preparation of traditional meals both in the hotels as well as on tours can be an important part of the Arctic experience.

8.4.3 Native Arts and Craft Production

The visitor to the Central Arctic is fortunate to have a first hand opportunity to observe the various types of craft production. While certain hamlets such as Holman and Spence Bay are more organized for observation, there are in fact, carvers and artists in each community and they can frequently be observed working outside their homes.

Tourists could also have the opportunity to actually take part in the production of certain craft items such as prints and carvings if short workshops were available.

8.4.4 Shopping

The ability to purchase craft in the location of its production - and ideally from the artist, is exciting and an important part of any travel experience. While the costs in the Co-ops are not significantly lower than in southern retail outlets, the desire of government and pleasure travelers to purchase is quite high and a tour to the craft shop is a part of each community visit.

If prices were known to be more competitive it is possible that more people would consider a trip to the Arctic Coast.

8.4.5 Historic Interpretation

Many communities have been in their present location for many years and consequently have a certain inventory of historic features that can be used for historic interpretation. For example;

- R.C. Church	Pelly Bay
" "	Cambridge Bay
"Maud"	Cambridge Bay
- Hudsons Bay Co. Plaque -	Gjoa Haven
- Parks Canada Plaque	Spence Bay

The communities are also potentially important historic interpretation centers for the activities that took place in the surrounding area. Gjoa Haven, for instance is an appropriate place to interpret the Franklin Expedition as Coppermine is important in the history of the Hudson's Bay Company.

8.3.6 Northern Technology

Each community has the resources to present contemporary northern technology such as electricity generation, housing construction, water and sewage etc. Cambridge Bay offers the most opportunity for this activity.

Activity Market Opportunities

Figure 8.1

	HOLMAN AREA	COPPERMINE AREA	CAMBRIDGE BAY AREA	GJOA HAVEN AREA	SPENCE BAY AREA	PELLY BAY AREA	BATHURST INLET AREA
LAND BASED							
- Sightseeing	●	●	O	O	O	●	●
- Hiking/Backpacking	●	●	O	O	O	O	O
- Camping	●	●	O	O	O	O	●
- Hunting/Trapping	●	●	●	O	●	●	O
- Archeological/Historic	O	●	O	●	●	●	O
- Nature Tours	●	●	O	O	●	O	O
- Photography	●	●	O	O	O	●	●
WATER-BASED							
- Canoeing		●	O		O	O	O
- Rafting		●					O
- Coastal Boating	O	●	O	O	O	●	O
- Fishing	O	●	●	●	O	O	O
- Kayaking	O	●	O	O	●	O	O
ICE-BASED ACTIVITIES							
- Spring Skiing	O	●	O	O	O	O	O
- Snowmobiling	●	●	●	●	O	●	O
- Dog Sledding	O	C	O	●	O	●	O
- Igloo Construction/Survival	●	●	●	O	●	O	●
COMMUNITY-BASED							
- Traditional Entertainment	●	●	●	●	●	●	O
- Traditional Eating	O	C	O	O	O	O	O
- Craft Production	●	C	O	O	●	O	●
- Shopping	●	●	O	O	●	●	●
- Historic Interpreation	O	●	●	●	●	●	O
- Northern Technology	O	●	●	O	O	O	

● High Market Opportunity

O Moderate Market Opportunity

No Market Opportunity

9.0 THE MARKET FOR ARCTIC COAST TOURISM

The purpose of this chapter is to describe the market available to the Arctic Coast tourism sector and the marketing strategies that should be pursued as part of the implementation plan. Overall tourism trends are discussed, along with their implications for the Arctic Coast. Northern destinations competitive with the Arctic Coast, current and projected tourism activity in the Arctic Coast, and marketing strategies for the region are also discussed. Our assessment is based on a review of previous documents, including those completed by members of the Study Team, plus personal and telephone interviews with government officials, tour package wholesalers and retailers (including the air lines), and other people involved in the travel industry.

9.1 Travel Industry - Characteristics and Trends

Many of the same trends that influence the travel industry in the rest of Canada and world-wide also affect tourism development in the Arctic Coast region. This section highlights the major trends, and offers the Study Team's views of their implications for tourism planning and development in the region. The data sources used in the analysis were relevant travel research and personal and telephone interviews. Discussion of our findings is presented on the following pages,divided between these two sources. The regional implications of each travel industry characteristics are also discussed.

The people interviewed generally confirmed the broader trends described in travel research. Interviews often added a norther perspective to the broad trends and details on recent travel industry developments. More information about the interviews is provided in Annex A to this chapter.

Industry Trend/Characteristics	Implications for Arctic Coast
I. From Travel Research	
a. Demographic/Economic	
Compared with the average resident, the typical traveller from NWT's and Canada's major tourism markets has a higher income and educational level, and is often in a professional, technical, or managerial occupation. The typical family traveling to the Territories has a family income of more than $40,000.	Although an Arctic Coast vacation will be expensive, the cost will not be viewed as prohibitive or as a deterrent for some travelers, as long as attractive travel products are available.
The baby boom generation has matured and moved into the key family formation years. The 25-44 age group will be the dominant age group in North America over the next ten to twenty years. This group has traditionally been viewed as the population segment with the highest propensity to travel.	The Arctic Coast must develop tourism products that appeal to the dominant age group, which has a relatively strong interest in cultural/educational experiences.
Although family groups will continue to be important to the travel industry, later marriages, fewer children, single parent households, and other societal trends are taking on added importance. Two income families, single people, and early retirees represent important new markets to the travel industry. For example, the trend toward early retirement is accelerating. Many retirees travel, often in the off-season, which helps to mitigate the seasonality problems of many tourist destinations.	This trend is favorable to the Arctic Coast. The cost of an Arctic Coast vacation is more manageable for a party of one or two than for a large family. Early retirees and "empty nesters" could be emphasized in off-season (April to June) market promotion.
Expo '86 in Vancouver will result in a large inflow of tourists into Western Canada in 1986. The GNWT recognizes the significant opportunities offered by Expo '86 as evidenced by the decision to construct and operate a major pavillion.	Expo '86 offers a unique opportunity to expose the Arctic Coast to a large market. Marketing plans must be developed well before 1986, and attractive tourism products must be available from 1986 on.
Competition among travel package retailers and wholesalers is intensifying. Travel experts expect that travel agents will play a more active role in total travel planning and that expanded profits will arise through increased specialization, segmenting markets, and expanding the range of services offered to clients. Wholesalers will also become more specialized.	The marketing plan for the Arctic Coast could involve selecting a few wholesalers/retailers in Canada's major centers to become specialists in marketing the region's tourism products.

Industry Trend/Characteristics	Implications for Arctic Coast
I. From Travel Research	
a. **Demographic/Economic** continued	
Pressure on Canada's balance of payments is expected to continue for the fore-seeable future, and the value of the Canadian dollar will remain low compared to the USA dollar. At the same time, the Canadian dollar has increased sharply in value compared to the Japanese yen and many European currencies.	Canadian vacations could remain competitive with American vacations, but Canadian operators will need to hold the line on prices and provide good value for money. Different curreny values suggest Arctic Coast marketing should emphasize Canadian and USA markets.
In the years ahead, tourism will have a high profile as one of Canada's major industries, and will be the target of major government programs to bolster the economy, create jobs, and reduce the balance of payments deficit. (Continuing high unemployment and the labour intensive nature of tourism will enhance tourism's role in the economic development strategies of government.) Virtually all provinces, the two Territories, many major cities, and many sub-provincial regions will be formulating and implementing tourism development plans in the' coming years. Many plans will be directing their marketing efforts to the same geographic and activity markets, and to expanding tourism during the shoulder and off-season.	Financial incentives, technical assistance, and marketing assistance from the federal and territorial governments should be available to Arctic Coast operators for many years into the future. The Arctic Coast should utilize this assistance to the greatest extent possible. At the same time, competition from other Canadian destinations will be growing, pointing out the need for the Arctic Coast to specialize in products and markets.
Deregulation of the Canadian airline industry will be phased in over the next few years.	Deregulation will not take place in the north. If the American experience is any guide, deregulation in southern Canada will mean more competition, lower fares, and perhaps more flights. It might be cheaper for Ontario and Quebec residents to travel to Winnipeg or Edmonton, resulting in a lower total cost for vacation trips to the Arctic Coast.
b. **Psychographics** (re Attitudes of **Travellers**) ,	
With the increase in education levels and the growing concern for the quality of life, many travelers are looking for more meaningful and sophisticated vacation experiences, which include cultural and educational activities and opportunities to become familiar with the lifestyles of other people.	Opportunities for cultural and educational activities and to increase awareness of native culture and lifestyles should be highlighted in developing and promoting tourism products.

Industry Trend/Characteristics	Implications for Arctic Coast
I. From Travel Research	
b. Psychographics (re Attitudes of Travelers) continued	
Environmental awareness is increasing, and concern for possible environmental degradation and over-crowding of facilities is growing. Interest is growing in non-consumptive wilderness experiences, and in travel destinations that are off, the beaten track. However, even when they are off the beaten track, many travelers expect accommodation and other services to be roughly on a par with those in a more urban setting.	These are potential selling points for an Arctic Coast vacation. However, some of the reigon's communities may need to be cleared of litter, and facilities may need to be upgraded and expanded through time.
Energy prices and fuel shortages are expected to continue to influence people's travel plans. The magnitude and the long-term effects of these factors, however, are difficult to predict. One view is that people will continue to travel--many people regard their annual vacation as a right--but they will travel shorter distances and will favour single destination trips and packaged tours over touring vacations using automobiles. Air, bus, boat, train and fly/drive travel will increase in popularity over the automobile. Rubber tire trips will still be made, but higher gas prices and smaller cars will likely shorten their duration. For Canada, these developments could mean reduced visitations from the United States - with the border states accounting for a rising proportion of USA travel to Canada--but this could be offset by increasing travel within Canada by Canadians.	These trends argue for the development of packaged tours for the Arctic Coast, the promotion of the Arctic Coast - or one of its communities - as a single destination, and greater marketing focus on Canadian and border U.S. markets.
The experience of the early 1980s has convinced some travel experts that people's desire to take a holiday is recession proof. Economic downturns, however result in more national and less international travel. The economic recovery in the United States has meant more travel overseas but not to Canada.	The emphasis placed on marketing efforts in different geographic areas should be sensitive to changes in the ecomomic cycle. Marketing efforts in the USA should take account of the growing indifference of Americans to Canadian travel destinations.

Industry Trend/Characteristics	Implications for Arctic Coast

I. From Travel Research

b. Psychographics (re Attitudes of Travelers) continued

Travel by recreational vehicle has continued to increase through the recession years. An RV represents a major capital investment, but it reduces ongoing travel costs. The current expectation is that RV use will continue to rise, especially as more fuel efficient engines are developed.	Tourists traveling by RV up the Macknezie and Dempster Highways could represent increased exposure for the tourist products of the Arctic Coast, especially for one to three day packages to see the "real" Arctic.
As a result of the slowdown in growth in discretionary income and the development of more travel destinations, the travel industry is becoming increasingly competitive and travelers are becoming more demanding. Future travelers will require complete and accurate information on the itinerary and costs for trips, will be less tolerant of poor service and facilities, and will not want any surprises. This helps to explain the growing popularity of preplanned tour packages over random touring by car. When a traveller is using a package, he/she will expect all aspects of the package to be honoured and will not tolerate unplanned major expenditures. The greater the time and expense to a destination, the more demanding a traveller can be expected to be.	Arctic Coast travel products and services must be competitive. An Arctic Coast vacation will be expensive, and tourists will expect value for money. Local people must be trained in: the development, promotion, and delivery of tour packages; how to cater to the needs and whims of tourists; operation of food, beverage, and accommodation facilities; preparation of high quality meals (especially northern foods).

c. Geographic

Most of Canada's major tourism markets will display lower growth in population and per capita income over the next twenty years than they did in the post-war decades. For most markets, the annual average growth in population will be between 1% and 2%, and gross national product (in constant values) will increase by between 3% and 4% per annum. Because of the" reduced growth in discretionary income, international and domestic travel is expected to grow by 4-6% per year through the 1980s, compared to the double digit growth of the 1960s and early 1970s.	Competition for travel dollars will be strong and travelers will be demanding. The Arctic Coast must provide a unique vacation experience which is strongly differentiated from alternative destinations.

Industry Trend/Characteristics	Implications for Arctic Coast
I. From Travel Research	
c. Geographic continued	
Travel from overseas (e. g., Japan and Western Germany) is expected to increase more than travel from the United States. Overseas visitors tend to stay longer and spend more money than other travel groups. Toronto, Montreal, and Vancouver are the major entry points for international travelers to Canada. Residents of British Columbia- and Alberta display a greater propensity to travel than residents of other Canadian provinces.	This trend appears to argue for strong overseas promotion. However, this must be weighed against the high cost of international marketing. An alternative approach would be to focus international promotion on the major entry points. Alberta and BC are already major markets for NWT tourism, and should be given important weight in Arctic Coast marketing.
Various sources suggest that, with the exception of Quebec residents, residents of Canada are displaying a growing interest in traveling to other parts of Canada, including the Northwest Territories. As discussed in a Maclean's article in the summer of 1983, interest in a northern vacation appears to have increased in recent years (as concluded by the writer of the article).	Arctic Coast promotion should meet with a receptive market. The region, however, is only one of many northern destinations being promoted to Canadian tourists. The Arctic Coast product must be ‘competitive and have special appeal.
In most parts of Canada and other countries, visiting relatives and friends is a major reason for travel. Because of the NWT’S small population, this travel market is probably less relevant to NWT and Arctic Coast tourism.	The “visiting friends and relatives” market will likely play a subsidiary role in-the Arctic Coast tourism industry.
II. From Interviews	
a. Markets and Promotion	
Typical visitors to the Yukon and Alaska have a university education, are between 25 and 50 yeras of age, and have a household income of more than $30,000 per year. Average income is probably higher when the rubber tire segment of the market is removed from the total.	The typical visitor to the Arctic Coast will likely have the same characteristics. It should be recognized that virtually all northern destinations are competing for the same socioeconomic groups.

Industry Trend/Characteristics	Implications for Arctic Coast
II. Rom Interviews	
a. Markets and Promotion continued	
Other northern jurisdictions (e. g., Alaska, Yukon) have approached the European market, but the European volume represents a very small partion of total visitors. The West German market seems to offer the most potential. Europeans are typically attracted by the outdoor and wilderness appeal of the north.	European marketing should be done selectively because of the high cost and possible low payoff. Maximum use should be made of "piggy-backing" on the marketing programs of government and major travel agents.
Where accommodation facilities are limited, large-scale promotion is not practical. Marketing should be focus on travel groupa of less than 20 people.	Accommodation will be in short supply in the Arctic Coast well into the future. Market promotion should focus on small travel groups.
b. Package Tours	
Package tours play a role in northern tourism and could take on added importance in the future. If tour group members are satisfied by the experience, repeat visits occur.	Package tours will likely play a major role in Arctic Coast tourism development. A successful tour requires a lot of effort from the community, as well as outsiders. Poor performance by local operators means that wholesalers will not sell the package in the future.
Although some tour operators offer northern packages that start in a specific town', most wholesalers believe all-inclusive, escorted tours that start and end at a major airport are the easiest to sell. This type of package also allows the operator to control the quality of the visitor's experience. Trips vary from a 24-hour circular to a two-week major wilderness trek. For European travelers, a 10 to 14 day range is best. A longer period creates problems maintaining a high level of interest. A shorter period creates problems selling an expensive holiday.	This type of tour package could play a major role in Arctic Coast tourism, especially for European and perhaps American travelers. The cost, however, will be high, especially when the expense of an escort is added to the cost of a 10-20 member tour group. Arctic Coast residents could be trained to take on this responsibility after the airplane arrives in the region.

Industry Trend/Characteristics	Implications for Arctic Coast
II. From Interviews	
b. Package Tours continued	
Party size for northern tours is generally 5-14 . Ten is a common and apparently profitable number. Problems with accommodation and transportation occur with groups larger than 20..	This situation is consistent with the Arctic Coast's capabilities, since the region's accommodation facilities cannot accommodate a tour group of more than 20.
Food is an important element of these tours. When the tour involves camping, the accommodation may be cramped, but good food and service can provide an important sense of quality.	Good preparation of northern food could provide this sense of quality in the Arctic Coast, but training is required to improve standards of preparation "and service.
Most tour operators concentrate their promotional efforts on: specialized magazines, specialized agents, inviting travel writers working for major magazines to visit regions of interest, attending major marketing (trade) shows, and four-colour brochures.	Discussions with tour operators are needed to ensure that the Arctic Coast's products play a role in these promotional efforts.
An intermediary is needed between the southern Canadian wholesalers, who know how to promote a product and understand the market place, and the local outfitter or expediter who will be the primary contact during 'the tourist's visit but often has a limited understanding of the tourist's needs and the market place.	These skills are virtually non-existent in the Arctic Coast. Development of this expertise should play an important role in training initiatives.
c. Northern Travel Products	
Hunting and sport fishing products and markets in the north are well established and quite lucrative. They are, however, consumptive and are generally conducted away from local communities. This is not consistent with a community based tourism approach. Some operators are giving attention to wilderness experience and cultural awareness tours that are non-consumptive and can involve activities that take place within a community.	The wilderness experience and cultural awareness will likely play important roles in Arctic Coast product development. These products have already gained some acceptance in the market place, but promotion will be needed to differentiate the Arctic Coast products from the products of competitors.
Other activity products/markets have not been actively promoted except for the one day (24 hour) curiosity tour which largely appeals to retirees over 55.	Short-term stay, curiosity tours could offer potential for the Arctic Coast, but additional products are needed to extend the stay to a minimum of two nights. Otherwise, the community benefits are negligible.

Industry Trend/Characteristics

Implications for Arctic Coast

II. From Interviews

c. Northern Travel Products continued

Wildlife and scenery are important components of the northern travel product. Several operators believe the real attraction is the mystique, remoteness, and image of a virgin, unexplored (and undeveloped) land. The history of expeditions and the desire to recreate these experiences adds to the appeal. These products appeal to very different markets than hunting and fishing, and requires different and separate approach.

The Arctic Coast offers these products in abundance, but the products must be effectively packaged and promoted to special interest groups.

d. Transpiration

Because of the high cost of air transportation, travel to the north is beyond the means of most lower to middle income groups. High air fares to and within the NWT are perceived as a significant constraint to tourism development in the Territories.

Deregulation could lower fares to northern entry points (Edmonton and Winnipeg). Major carriers to the north should be approached as well to consider mechanisms for lowering fares for special group travel to the Arctic Coast. The airlines should be involved in tourism plan development and implementation for the Arctic Coast.

Many of the travel industry trends described in this section are favorable for the development of the Arctic Coast travel industry. Favorable trends include: the growing importance of a wilderness vacation which includes a significant educational/cultural component; the popularity of destinations which are off the beaten track, uncrowded, and environmentally untouched; the increasing emphasis on pre-planned tour packages; and the preference for air travel over other modes. Less encouraging trends include:

- Growing competition. The Arctic Coast is one of many destinations that can offer a wilderness experience. The Arctic Coast tourism product must be packaged and promoted in a manner that makes it distinct, from the products of other destinations.

- Emphasis on high quality facilities and services. For the most part, the Arctic Coast's facilities are inadequate and its workforce has very little experience with tourism and tourists.

- Need for complete, accurate and up-to-date information on travel destinations. The Arctic Coast's distance from major markets makes it difficult to transmit information, control its distribution, and ensure its accuracy.

  Emphasis on increasing visitation during shoulder and off-season months. A winter trip to the Arctic Coast would not likely be viewed as an attractive experience by many.

9.2 Competitive Destinations

All northern destinations in North America are competitors to the Arctic Coast. Many are marketing travel products that appear to be similar to those the Arctic Coast could promote. The following summary of travel products and strategies from competing destinations is based on personal and telephone interviews.

Alaska. According to respondents, the underlying reason tourists come to Alaska **is** to get away from the developed city areas and to experience a totally different type of holiday. While wildlife photography and the outdoor adventure experience are becoming popular, hunting and fishing are still important attractions. **The** most important travel products include: fishing, native culture, scenery, and history. The emphasis has shifted from remote, lodge-based activities to community-based activities -- communities are the hub for a holiday and taking day trips to attractions . Tour packages are important, and repeat visitations are quite common.

Although rubber tire access is important, **60%** of visitors arrive by plane. Cruise ships are also an important travael mode. Visitors by ship tend to have high incomes **($60,000** plus) and be between 55 and 65 years old. Visitors arriving by plane and motor vehicle tend to be younger, and have lower incomes than cruise visitors. Tourist volume has grown by 7-10% a year for the past 20 years, with the West Coast USA **being** the largest geographic market.

Yukon. Most visitors to the Yukon are campers and sightseers. Fishing and hunting are less important activities . Most visitors arrive by motor vehicle and many are on their way to/from Alaska. Wilderness scenery is the Yukon's number one product. Sixty-one percent of visitors are from Alaska, Washington, Oregon, and California. Thirty percent are from western Canada and **5%** from Germany and Austria. Package tours are important, constituting 13% of total visitations. "Empty nesters" (over 50) **with** incomes above $30,000 are an important market, and the **25-40** age group is growing in importance.

Northern **British** Columbia. Tourism promotion **in** northern **BC** largely focusses on hunting and fishing.. Most tourists arrive by motor vehicle. There has been little development of tour packages. Europeans are attracted by the outdoor appeal, but also like to feel close to a metropolitan area. (This could be a disadvantage for the Arctic Coast in promoting the European market.)

Northern Alberta. Most visitors to northern Alberta are interested in wilderness adventure (canoeing and hiking), fishing, and visiting friends and relatives. Visitors to fishing camps come mostly from southern Alberta and the western United States, and repeat visits are important. California and Arizona are important markets for retirees traveling by motor coach.

Northern Saskatchewan. Mcst visitors to northern Saskatchewan are traveling to fishing camps, and 50% arrive by plane. Major markets (in order of tourist volume) are North Dakota, North Central United States, and the Southwestern American states. The Saskatchewan respondent noted that higher air fares are forcing tourism operators to become more price competitive, and that visitors are becoming more sensitive to both price and quality. He also noted the need for training for local people in basic business skills and on outfitter and guide certification requirements.

Northern Manitoba. Tourism promotion in northern Manitoba largely focusses on hunting and fishing activities. White water rafting and nature observation are secondary activities of tourists. Visitors are becoming more aware of the need for resource management. Forty percent of visitors arrive by plane and 65% of northern visitors represent repeat business. Most people on package tours are from the midwest United States and West Germany. Problems faced by tourism operators include the short season (90 days) before freeze-up, and the high costs of transportation and construction.

Northern Ontario. Seventy-five to eighty percent of visitors are involved in hunting or fishing. Most arrive by motor vehicle. Package tours are important in penetrating the European market. West Germans like the wilderness appeal and the opportunity to visit a major city (generally Toronto) before and after the northern trip. The Ontario respondent emphasized the tough competition for the tourism dollar.

Other Regions of the Northwest Territories. Other areas of the NWT **have similar** travel products to those of the Arctic Coast. Most **areas offer hunting and fishing, and virtually all areas offer wilderness appeal. There is some product differentiation between regions, and different markets must be promoted if regional tourism coordination is to be achieved and tourism benefits to the total NWT are to be maximized. The Arctic Coast offers wilderness and cultural opportunities that are available only in selected parts of the north. The experience offered by the Coppermine River and Bathurst Inlet are distinct from the opportunities** offered by other regions.

Tourist promotion in other NWT regions has largely been directed toward hunting and fishing. The community-based approach, geared toward “special interest” tourists has only been adopted in the last few years. This approach is expected to be the focus of future tourist promotion, especially by the regional tourism zones.

To summarize, hunting and fishing are major attractions in all of the northern destinations surveyed by the Study Team, except possibly for the Yukon, which has a lot of pass-through traffic. Although some destinations are marketing travel products which include wilderness, cultural and historic components, these these travel products are not being actively promoted. Respondents indicated that there is a market for educational, cultural, and related products and that the Arctic Coast could serve these markets if the Arctic Coast’s products are strongly differentiated from those of competing destinations.

9.3 Tourism in the NWT and the Arctic Coast: Results from Previous Studies

Over the past seven years a number of surveys have been conducted using different techniques and time frames to collect information on the NWT tourism industry. Before developing a set of market projections for the **NWT and Arctic Coast tourism industry it is necessary to review the results of these surveys.**

The Northern Travel Survey 1978, conducted by **Deloitte, Haskins** and Sells Associates, explored the characteristics of tourist parties exiting the Northwest Territories by motor vehicle. Only non-resident motor vehicle visitors were included in the report. The report did not provide estimates of the total number of non-resident tourists visiting the Territories. The major characteristics of non-resident motor vehicle travelers were as follows:

- 78% were from Canada and 21% from the United States (the number from other countries was negligible). Alberta accounted for 49% of total visitors, followed by British Columbia (19%), Ontario (9%), and Saskatchewan (7%). The study suggested the Canadian provinces may be accounting for a growing proportion of automobile travelers to the NWT. (A 1969 automobile survey conducted along the Mackenzie Highway found that 60% of visitors were Canadians.)

- Professionals and skilled **labour** were the dominant occupational categories, and most visitors had household incomes of better than $30,000 (1978 dollars).

- Average party size was 2.8, and 78% of visitors were adult (over the age of 18).

- 60% of travelers had been on at least one extended trip (more than 4800 km one-way from home) in the previous two years.

- 53% indicated their trip included a visit to other areas; of these, 90% said they had visited or intended to visit Alberta; comparable figures for British Columbia were 40% and 32%.

- 35% of travelers came to visit friends and relatives, 11% came to fish and boat, 8% gave business as their major trip purpose; the remainder can be classified as sightseers. 47% of visitors came in self-contained vehicles that provided both accommodation and transportation.

- On average, visitors to the NWT planned to stay away from home a total of 24 nights. The average length of stay in the NWT was nine nights (or 38% of the total length of trip of 24 nights). The average expenditure per party-night was $96.80 and the average expenditure per person-night was $34.60. The distribution by expenditure category was as follows: meals - 12%; groceries - 8%; accommodation - 13%; auto costs - 9%; other transportation 38%; recreation/entertainment - 9%; gifts and souvenirs - 11%. The report noted that some of these expenditures, e.g. , on other transportation, may not have been incurred in the NWT.

- Major activities engaged in by visitors included fishing (57% of total visitors), water recreation (42%), photography (23%), visit to historic sites and museums (21%), land recreation (20%).

- The highest proportion of nights were spent in Yellowknife (28%) and Hay River (27%). Most visitors stayed in government operated campgrounds. A significant portion stayed some nights with friends and relatives.

Because **it is** based on an auto exit survey, the report provides no information on travel to the Arctic Coast. The results, however, may be relevant to a tourism strategy **for** the Arctic Coast to the extent that motor vehicle travelers to the NWT are viewed as a potential market for the region's tourism operators.

The Northwest Territories Travel Surveys 1981-82, prepared by **Deloitte,** Haskins and Sells, was published in June, 1982. Its purpose was to provide a comprehensive and practical database for NWT tourism. The project encompassed surveys of visitors to the **NWT,** NWT residents, and NWT Park users.

Its major value to the current assignment is that this report represents the only attempt at developing full-year estimates of tourist visitation and expenditures in the Northwest Territories .

Annual estimates relevant to the current assignment include the following:

1. Over the June, 1981 - May, 1982 survey period, about 106,000 person-trips were made to the **NWT;** 65% (69,000) occurred **in** the summer (June - September inclusive). Average length of stay for the full year was 14 nights. With per diem expenditures of $39.00, total tourism expenditures were estimated at $57.0 million; $39 million occurred **in** the four summer months.

2. Residents were estimated to undertake **75,000** person-trips within the NWT. The average length of stay was estimated at five nights and per diem expenditures at $29.00. Total expenditues by resident travelers were calculated at $11.0 million; $3.8 million occured in the four summer months.

3. Residents took 106,000 person-trips outside the NWT. The length of stay outside the Territories averaged 12

nights and per diem expenditures were $35. Total expenditures by resident travelers outside the Territories were $44 million, distributed as follows through the year: June to Sept - $16 million; Ott to Feb - $17.7 million; March to May - $10.3 million.

4. Over the full year, travel by visitors and residents across NWT borders amounted to 212,000 person-trips. Of these trips 86,500 (41%) were by air, 2,500 (l%) were by bus, 123,000 (58%) were by motor vehicle.

5. The seasonal distribution of tourist travel was estimated as follows:

	Person Trips ('000)			
	June - Sept. (4 mo.)	Oct. - Feb. (5 me.)	'March - Mav (3-me.)	Full Year
Visitors to NWT				
Number	69	23	14	106
% of full year	60.1	21.7	13.2	100.0
Residents within NWT				
Number	32	28	15	75
% of full year	42.7	37.3	20.0	100.0

6. Visitor expenditures were distributed as follows by purpose of trip and season. (Summer is June through September and Winter is Ott - May.).

   Over the full year, about 25% of visitors were on business. Because business travelers stay longer than pleasure travellers, full-year expenditures by the two groups are approximately equal.

	Parties	Party Size	Persons	Nights Per Person	$/ Diem	Total $ Million
Business						
Summer	5500	2.0	11,000	50	36	20
Winter	9500	1.6	15,000	15	36	8
Total	15,000	1.7	26,000	30	36	28
Pleasure						
Summer	17,000	3.4	58,000	8.5	43	21
Winter	11,500	2.0	22,000	8.5	43	8
Total	28, 500	2.8	80,000	8.5	36	29
All Visitors						
Summer	22,500	3.1	69,000	13	43	39
Winter	21,000	1.8	37,000	15	33	18
Total	43, 500	2.4	106,000	14	39	57

7. The June, 1982 report offered order of magnitude estimates by regions. Regional distributions of the key indicators were as follows:

	Parties (%)	Persons (%)	Expenditures (%)
1. Eastern Arctic	10.3	8.5	10.5
2. Keewatin Arctic	4.6	4.7	8.8
3. Coastal Arctic (Arctic Coast)	3*4	4.2	8.8
4. High Arctic	2.3	1.9	4.4
5. Southern Arctic	60.9	66.0	52.6
6. Western Arctic	26.4	21.7	15.8

As anticipated, the Southern and Westen Arctic regions (centered on Yellowknife and Inuvik) accounted for the lion’s share of tourism activity in the NWT.

The actual figures for the Arctic Coast (defined as Coastal Arctic in this report) and the total are as follows:

	Visitors		Residents		Both Groups	
	Arctic Coast	Total NWT	Arctic Coast	Total NWT	Arctic Coast	Total NWT
Parties	1,500	43,500	700	23,500	2,200.	67,000
Party-Size	2.9	2.4	2.1	3.2	2.7	2.7
Persons	4,500	106,000	1, 500	75,000	6,000	181,000
Nights/ Person	16	14	15	5	16	10
$/Diem	70	“ 39	23	29	58	37
Total ($million)	5.0	57.0	0.5	11.0	5.5	68.0

The figures suggest the Arctic Coast plays a very small role in the NWT's travel industry. The region accounts for less than 4% of the person-trips made by visitors and residents, and only 8% of total tourism expenditures. The Arctic Coast's higher share of expenditures reflects the extended stays of many tourists (many "tourists" go to the Arctic Coast for employment) and higher daily expenditures (the result of the region's high cost of accommodation and meals).

This report and others do not provide any further information on tourism in the Arctic Coast. However, some important differences from the rest of the NWT are indicated by other information sources.

Business travelers probably account for a much higher proportion of tourism in the Arctic Coast than in the total NWT. This situation reflects the lack of tourism facilities and attractions in the region, and the limited travel to visit family and friends. Business travel probably accounts for a maximum of 70% of person-trips to the region, compared to 25% in the NWT as a whole (as indicated in the June 1982 report). Because of the greater importance of business travel, travel to the region is likely more evenly distributed throughout the year. Because virtually all travel to the Arctic Coast is by air, preferred accommodation and recreation activities, as well as the origins of visitors probably differs a great deal from the NWT as a whole.

The June, 1982 report included detailed information on summer visitors to the NWT in 1981. The origins of visitors were distributed as follows:

Alberta	27%	
Other Western Canada	18%	
Ontario	14%	
Quebec	3%	
Other Eastern Canada	2%	
Sub Total : Canada		65%
U.S. West Coast	6%	
Other Western U.S.	8%	
Eastern U.S.A.	11%	
Southern U.S.A.	2%	
Sub Total: U.S.A.		27%

Germany	5%	
Other Offshore	3%	
Sub Total: Offshore		8%

The average party size was 3.1, and most travelers were on fairly extended trips. The typical summer visitor spent 13 days in the NWT out of a total trip of 28 days. Campgrounds accounted for 25% of visitor bed nights, followed by friends and relatives .(15%), other camping (14%), hotels and motels (13%), and lodges (8%). The remainder (25% of visitor bed nights) included work crews in construction, mining and exploration camps.

The mode of transport was distributed as follows:

Standard Car	12%
4 - Wheel Drive	5%
Van, Pick-up Truck	16%
Truck Camper	14%
Other RV	9%
Bus	2%
Air - Scheduled	35%
Air - Private or Charter	5%
Other	2%

Three parties of visitors were on a package tour, which cost them an average of $1,400 per person. Activities most frequently mentioned by visitors were shopping for crafts, camping, fishing, and visiting museums and historic sites. Forty percent or more of visitors participated in these activities.

Only one of five visitor parties had children with them, and 27% of parties were composed of adults 55 years and older.

The majority of summer visitors (57%) reported they were employed in professional, administrative, and other skilled occupations. Retired people accounted for another 18% of total visitors. Average household income was reported to be $31,000.

Visitors to the Northwest Territories - 1982, conducted largely by Underwood McLellan Ltd., reports tourist visitations to the NWT during the summer of 1982. Although the surveys cover much of the same ground as the 1981 survey reported above, the results are quite different. The 1982 surveys suggested that about 44,000 people visited the NWT during the summer of 1982, and spent about $40 million in the Territories. Given an average trip length of about 9 days, averge per diem expenditure was estimated to be approximately $100 per person. For automobile travelers the average per diem expenditures appeared to be between $20 and $30. The figure used for air travelers was about $135.00 per person per day. Two-thirds of visitors entered by air, and the remainder by road. Visitors to Kitikmeot totalled only 400 (0.9% of the total) and tourist expenditures in the region came to $440,000 (1.1% of the total). In every respect there figures differ markedly from the numbers developed from the 1981 summer surveys.

Other aspects of NWT tourism as indicated in the 1982 surveys are as follows:

1. Visitor place of residence was distributed as follows:

Alberta	42%	
British Columbia	13%	
Other Western Canada	9%	
Ontario	13%	
Quebec	3%	
Other Eastern Canada	3%	
Sub Total: Canada		84%
United States	13%	
Offshore	4%	

2. 68% of visitors entered by air and 30% of visitors were on business. The most important trip activities were sightseeing, visiting friends and relatives, and fishing. 51% of visitors were in professional and managerial occupations and 12% were retired; 21% were 55 years of age and older and 56% were between the ages of 25 and 54 inclusive. Average household income was reported to be $34,500.

The document, GNWT Summer Travel Surveys 1983, Report of Findings, was prepared by Canadian Facts, based on surveys covering the months of June to September inclusive. The report estimates that 44,000 tourists visited the NWT in the summer of 1983. The mode of entry was distributed as follows:

	No.	%
Scheduled Aircraft	15,000	34
Charter and Private Aircraft	11,300	26
Road	17,500	40
Total	44,000	100

Total visitor expenditures were estimated at $65 million. Given an average length of stay of 10 days, per diem expenditures are computed to be $150 per person. (Expenditures were estimated by assuming that each visitor spent $1,500 during his stay in the Territories.)

In this report, visitor characteristics were described in terms of categories of visitors (e.g., visitors to hotels, motels, and lodges). No effort was made to describe the characteristics of all visitors combined. Some of the more important characteristics of the sub-group who stayed at hotels, motels or lodges are as follows:

- Guests at NWT hotels, motels, and lodges generally came from five locations: the NWT (39%), Alberta (24%), the United States (21%), British Columbia (6%), and Ontario (5%).

- Another survey indicated that non-resident visiters to sheltered accommodation were distributed as follows: Alberta (28%); the United States (26%); Ontario (16%); British Columbia (8%); Manitoba (6%).

- 55% of non-resident respondents were visiting the NWT primarily for vacations; 37% were traveling on business or commuting to work. Business travelers stayed an average of 14 nights compared to seven nights for pleasure travelers. The weighted average for both groups was 10 nights. On a daily basis, the business traveller staying in sheltered accommodation on average appears to spend abouat 30% more than the pleasure traveller.

- On a regional basis, the vast majority of visitors to the NWT travel to the Fort Smith region (67% of guests surveyed in hotels, motels, and lodges visited the Fort Smith region). Trips to the Inuvik region are made by about one-third of summer travelers. Journeys to the Arctic Coast, Baffin, and Keewatin regions are made far less often in the summer period.

- The most popular activities of non-resident travelers are shopping for crafts (52%) fishing (40%), visiting museums and historic sites (40%), business (39%), and nature study (32%).

- 60% were in managerial and professional occupations; 10% were retired.

- 37% of non-resident respondents came from households with combined total annual income of $50,000.

- Another 30% were from households with incomes from $30,000 to $50,000.

- 60% of travel parties were one or two people.

The 1983 report includes results from a telephone survey of NWT residents living in Yellowknife, Hay River, Fort Smith, and Fort Simpson. Some of the results are relevant to this assignment.

1. Most resident trips within the NWT are for two or three day excursions. More than 50% of these trips are for business purposes. 85% of all resident travel within the Territories (from the four surveyed communities) is to the Fort Smith region. The average party size is about 3 people and the typical mode of travel is plane (42% of person trips).

2. On average, an NWT resident living in one of the four communities can expect to have guests visit twice in the summer period. The average number of persons per guest party is 2.2 and the average number of nights guests stayed per occasion was 11. Fifty-four percent of guests of NWT residents use air travel. 80% are on vacation (or traveling for personal reasons) and 20% are on business. The most important places of origin for this type of visitor are: Alberta (41%), Ontario (18%), British Columbia (13%), Other Canada (20%), Other Countries (8%).

The four documents summarized here provide data which, in many cases, are confusing and contradictory. Exhibit 9.1 compares the surveys of summer travel for a number of major indicators. The differences highlighted by the exhibit make it difficult to develop visitor profiles for the NWT and Central Arctic travel industries.

Differences are particularly striking in per diem expenditures, average length of stay and mode of entry. Inconsistencies and gaps in the data make it impossible to identify trends over time, and they jeopardize the reliability of estimates of the overall size and composition of the NWT'S tourism industry.

In addition to the Territorial wide surveys, one community specific survey is relevant to this assignment. In the early 1980s, the Pangnirtung Visitor survey was conducted to define perceived issues and concerns of existing travelers to

EXHIBIT 9.1: COMPARISON OF SURVEYS OF SUMMER VISITORS

	1978[1]	1981	1982	1983
No. of Visitors	n/a	69,000	44,000	44,000
Expenditures ($ Million)	n/a	38.7	40.0	65.0
Party Size	2.8	3.1	n/a	about 2.0
Length of Stay (nights)	9	13	9.0	10.0
Per Diem Expenditure ($)	34.60	43.00	100.00	150.00
Mode of Entry (%)				
- Air	n/a	40	68	60
- Personal Motor Vehicle	n/a	56		
- Bus	n/a	2	32	40
- Other	n/a	2		
Origins (%)				
- Alta	49	27	42	30
- BC	10	n/a	13	12
- Ont	9	14	13	16
- Other Canada	11	23	14	12[e]
- Us.	21	27	13	26
- Offshore		8	4	4[e]
Occupations (%)				
- Professional Management	Most	44	51	60
- Skilled Labour	Most	21	8	8
- Retired	n/a	18	12	10
- Other	n/a	17	29	22
Average Household Income ($)	30,000 (plus)	31,000	34,500	40,000
Average Age	n/a	n/a.	37	n/a
Purpose %				
- Business	8	25	. 27	37
- Visit friends and relatives	35	9	28	63
- Leisure, etc	57	66	45	
Expenditure by Category (%)				
Accommodation	13	n/a	n/a	40[2]
Meals	12	n/a	n/a	6
Groceries	8	n/a	n/a	2
Auto	9	n/a	n/a	11
Other transportation	38	n/a	n/a	16
Recreation	9	, n/a	n/a	12
Gifts & Souvenirs	11	n/a	n/a	6
Other				7

[1] Auto exit survey only.
[2] From survey of people who stayed at hotels, etc.
e = estimated by Study Team

EXHIBIT 9.1: COMPARISON OF SURVEYS OF SUMMER VISITORS continued

	1978	1981	1982	1983
Major Leisure Activities (%)				
- Fishing	57	51	37	40
- Water Recreation	42	34	13	12
- Photography	23	n/a	n/a	n/a
- Visits to Historic sites & museums	21	41	15	40
- Land recreation camping, etc.	20	51	26	32
- visits to relatives/ friends	n/a	27	44	19
- shopping for crafts	n/a	53	n/a	52
% of person trips to Central Arctic	n/a	4*2	0.9	n/a
% of parties on package tours	n/a	3*0	n/a	n/a
Average length of tour	n/a	n/a	n/a	n/a
Dollar value of package per person	n/a	1400	n/a	n/a
Type of Accommodation				
- Hotels, motels, lodges	n/a	21	n/a	n/a
- Campgrounds etc.	n/a	39	n/a	n/a
- Friends & relatives	n/a	15	n/a	n/a
- Other (camps, etc)	n/a	25	n/a	n/a

Pangnirtung and the surrounding areas in the Baffin. The most relevant findings are as follows:

- Visitor origins were Ontario (25%) other parts of NWT (22%), United States (20%), Quebec and Europe (12% each), and Western Canada (9%).

- 27% of visitors were with a special interest group on club but only 6% were part of a commercial tour package.

- 38% of travelers were visiting Pangnirtung and area, 32% were visiting Auyuittug National Park, and 22% were on business.

- 38% of visitor nights were spent in a hotel and 32% in a tent. Outfitters camps, hostels, and friends/relatives accounted for the remainder.

- Major activities were photography, sightseeing, hiking/backpacking, buying handicrafts, and visiting Aiyuittug National Park.

- Most respondents were satisfied with the trip; 96% of respondents said the trip met their expectations. The major dislikes were bad weather; litter in the community and honey bags; and expensive services inadequate food the quality of guiding, and hotel facilities taken together.

- 60% of visitors were between 21 and 40 years of age; 22% were over 540% had family incomes of over $35,000: 36% were between $20,000 and $35,000).

A final information source is inquiries to Travel Arctic (in Yellowknife) for information on NWT tourist attractions. Inquiries, both solicited and unsolicited, totalled 52,200 to the end of September, 1984. This exceeds the full year 1983 figure by nearly 5%. The geographic distribution of the

7,390 unsolicited inquiries (which provides some measure of the geographic distribution of market interest) was as follows:

	%	
Canada		
Ontario	15	
Alberta	9	
Quebec	8	
Maritimes	3	
Saskatchewan	3	
Manitoba	3	
NWT	8	
Sub Total Canada		54%
Overseas		
West Germany	2	
Other	5	
Sub Total Overseas		7%

	%	
United States		
California	8	
New York	2	
Illinois	2	
Michigan	2	
Other	25	
Sub Total U.S.		39%

To provide other benchmarks for estimating the size and character of the NWT tourism industry, the Study Team reviewed the results from the most recent non-resident visitor's surveys of Alberta and British Columbia. The BC survey called "Visitors '79" was conducted between May 18 and October 31, 1979 and was published in June 1980.

The Alberta study, called "1982 Alberta Travel Survey" was based on a survey conducted from May 15 to October 31, 1982. Exhibit 9.2 provides the major tourism indicators for the two provinces plus two northern regions in each province (four regions which could be viewed as competitive with the NWT.)

EXHIBIT 9.2: TOURISM INDICATORS FOR BRITISH COLUMBIA AND ALBERTA

	B.C. Visitors '79			1982 Alberta Travel Survey		
	Total Province	Yellowhead "16"	Peace River Liard	Total Province	Lakeland	Land of the Mighty Peace
Parties ('000)	1660	106	69	2102	109	49
Party Size	2.70	3.10	2.5	1.86	1.83	2.06
Total Person - Trips ('000)	4482	329	173	3909	199	101
Average Length of Stay	6.10	4.00	3.40	6.11	4.92	5.28
Total Person Nights ('000)	27,340	1314	587	23,883	997	533
Expenditures ($million)	541.0	26.70	12.02	660.4	25.0	14.0
Per diem Expenditure ($) (Per person)	23.0	20.32	20.48	27.73	25.68	25.72
Mode of Exit (%)						
- Private vehicle	74	76	97	65	69	85
- Plane	19	20	2	27	24	10
- Bus	2	4	1	7	6	4
- Train (& other)	5			1	1	
Origins (%)						
- B.C.				31	28	34
- Alta	33	34	45			
- Sask	5	NA	NA	18	20	5
- Man	2	NA	NA	8	11	2
- Ont	6	NA	NA	10	11	4
- Rest of Canada	2	16	24	6	12	24[1]
- U.S.A.	47	36	19	23	14	30
- Offshore	6	14	2	6	4	2
Occupations (%)						
- Professional, Man.	NA	NA	NA	34	NA	NA
- Skilled Worker	NA	NA	NA	15	NA	NA
- Retired	NA	NA	NA	15	14	32
- Other						
NA	NA	NA	36	NA	NA	
Average Income $)	26,400	NA	NA	30;000	NA	NA
Purpose of[2] Trip (%)						
- Business	16	16	36	17	20	12
- Visit Friends and relatives	82	84	64	31	38	29
- Vacation				42	40	47
- Personal[3] and other	2			9	3	12

EXHIBIT 9.2: TOURISM INDICATORS FOR BRITISH COLUMBIA AND ALBERTA continued

	B.C. Visitors '79			1982 Alberta Travel Survey		
	Total Province	Yellowhead "16"	Peace River Liard	Total Province	Lakeland	Land of the Mighty Peace
Expenditures by Category (%)						
- Accommodation	23	18	19	19	18	6
- Meals	25	20	27	24	22	22
- Souvenirs	8	12	11	9	10	13
- Auto	13	23	28	21	25	33
- Other Trans.	5	10	2	3	6	3
- Recreation & Entertainment	7	4	4	8	8	9
- Shopping for Souvinirs	12	11	7	16	11	15
- Other expenditures	8	2	2			
Major Leisure[4] Activities						
Fishing	4	9	1	6	21	19
Water Recreation	5	1	1	12	14	20
Photography	NA	NA	NA	28	24	36
Visits to Historic Sites etc.	NA	NA	NA	25	27	30
Land Recreation (camping)	4	3	2	26	39	40
Visits to Friends and Relatives	28	32	21	53	57	64
Shopping	4	3	1	30	35	46
Sightseeing	26	25	17	59	64	67
% of Parties on Package Tours	4.8	NA	NA	3.3	3.0	0
Average Length of Tour[5]	4	NA	NA	4.5	NA	NA
Dollar Value of Package per person[5]	440	NA	NA	310	NA	NA
Type of Accommodation (%)						
- Hotels, Motels, Lodges	46	40	38	38	36	22
- Campgrounds, etc.	29	40	44	15	17	17
- Friends & relatives	22	18	14	37	36	36
- Other	3	2	4	10	11	25

N.B. Regional figure based on visitors who stayed overnight in the region.
1 Includes 21% from NWT
2 Includes people on both business and pleasure
3 Includes "Passing Through"
4 Primary activity for B.C. Primary or Secondary for Alberta
5 Portion in B.C. or Alberta

Visitors '79 also provided information on different types of visitors. The key indicators are as follows:

	Business Travelers	Pleasure Travelers	Tour Travellers	Visitors Traveling By Auto	Visitors Traveling By RV	Visitors Traveling By Plane
Average Party Size	1.8	2.8	6.1	2.6	3.2	2.5
Length of Stay	6.0	6.0	4.0	5.3	6.7	8.1
Mode of Exit (%)						
- Auto	47	61	4	100	0	0
- RV	2	17	1	0	100	0
- Plane	49	15	60	0	0	100
- Other	2	7	35	0	0	0
Type of Accommodation						
Hotel/Motel	73	43	91	54	5	61
- Friends & Relatives	16	21	4	23	9	32
- Camping	6	33	3	20	85	3
- Other	5	3	2	3	1	4
Origin (%)						
- Alta	42	31	3	37	40	21
- Other Canada	17	14	15	12	9	24
- Us.	35	49	61	49	49	37
- International	6	6	21	2	2	18
Average Family Income	33,000	25,000	26,000	26,000	25,000	30,000
Per Diem Expenditure (per person) ($)	34.59	21.09	21.28	22.23	14.68	35.81

The different per diem expenditures for different types of travelers could be particularly useful to this assignment. The business traveller in 1979 spent an averagae of about 70% more than the pleasure traveller. The typical business traveller spent more time in hotels/motels and on planes.

9.4 Estimates for 1984 and Projections to 19~~8~~93: NWT and the Arctic Coast

Based on the results of previous NWT surveys and the survey results from other jurisdictions, the Study Team constructed a set of estimates of **NWT** tourism for 1984. These were used as benchmarks for developing tourism estimates for the Arctic Coast and tourism projections for both the NWT and the Arctic Coast through the year 1993. Both sets of projections assume that a major tourism strategy and plan for the Arctic Coast is not implemented over the next decade. Projections illustrating the kinds of effects an Arctic Coast tourism plan could have are presented in ~~Annex P.~~ the Economic Impacts section

The 1984 estimates for the NWT are based on the following hypotheses:

- Summer visitors (June to September) to the NWT totalled 50,000 person trips, divided 35/65 beteween business and pleasure travel. The average length of stay was about 10 days, 14 days for business travelers and eight days for pleasure travelers. The average party size was 2.8 for pleasure travelers and 1.8 for business travelers, providing an average of 2.3 people per visiter party.

- The number of off-season or winter visitors (October to May inclusive) totalled 28,000 (about 55% of summer visitation) divided 75/25 between business and pleasure travel. The average length of stay and average party size for business and pleasure travelers are the same as for summer visitors.

- Business travelers spend an average $120 per day, and pleasure travelers spend an average of $70 per day. Business travellers are more likely to stay in hotels and perhaps to spend more on air travel while in the Territories.

- The mode of entry is 55% air and 45% motor vehicle in the summer, and 80%/20% in the winter. The type of accommodation used by visitors is distributed as follows:

	Summer (%)	Winter (%)
Hotels, Motels, Lodges	30	55
Campground's	30	
Friends & Relatives	20	35
Camps etc.	20	10

- The origins of visitors are:

	Summer	Winter
Alberta	35	40
British Columbia	12	15
Ontario	15	18
Other Canada	14	16
United States	20	10
Offshore	4	1

- About 50% of visitors hold managerial and professional positions, and approximately 15% are retired. Average household income of visitors is in excess of $40,000 per year. The major leisure activities of summer visitors are expected to be broadly consistent with the distributions displayed in Exhibit 9.1. Shopping for crafts, fishing, visits to historic sites and museums, camping and other forms of land recreation, and visits to relatives and friends are the most popular activities with the typical summer tourist to the NWT. About 3% of visitor parties were on package tours during the summer.

- Residents traveling within the NWT made 80,000 person trips in 1984. (This amounts to a little less than two trips per capita.) Seventy-five percent of trips were for government and business travel, and 25% were for pleasure. Average length of stay was four days four both groups, and the average party size was 3.0 for pleasure travelers and 1.8 for business travelers. Business travelers spent on average $100 per day, compared to

EXHIBIT 9.3: ESTIMATES OF VISITATIONS AND EXPENDITURES IN **NWT** TOURISM: 1984

	Visitors Summer	Visitors Winter	Resident Travel in NWT	Total
Parties ('000)				
Business	9.7	11.7	33.3	54.7
Pleasure	11.6	2.5	6.7	20.8
Total	21.3	14.2	40.0	75.5
Party Size				
Business	1.8	1.8	1.8	1.8
Pleasure	2.8	2.8	3.0	2.9
Total	2.3	2.0	2.0	2.1
Total Person-Trips ('000)				
Business	17.5	21.0	60.0	98.5
Pleasure	32.5	7.0	20.0	59.5
Total	50.0	28.0	80.0	158.0
Average Length of Stay				
Business	14	14	4	7.9
Pleasure	8	8	4	6.7
Total	10	12	4	7.4
Total Person Nights ('000)				
Business	245	294	240	779
Pleasure	260	56	80	396
Total	505	350	320	1,175
Per Diem Expenditures ($/Person)				
Business	120	120	100	114
Pleasure	70	70	60	68
Total	94	112	90	98
Total Expenditures ($ Million)				
Business	29.4	35.3	24.0	88.7
Pleasure	18.2	3.9	4.8	26.9
Total	47.6	39.2	28.8	115.6
Mode of Entry ('000 Person-Trips)				
Plane	27.5	22.4		49.9
Motor Vehicle	22.5	5.6		28.1
No. Parties on Package Tours	640			640
Person-Nights in Hotels/Motels/ Lodges ('000)	151.5	192.5	128.0	472.0
Room-Night Demand ('000)[1]	75.8	128.3	85.3	289.4

[1] Based on 2.0 people per room in the summer (for visitors), and 1.5 people per room for the other two categories.

$60 per day for pleasure travelers. The lower figures when compared to visitor expenditures reflect the probability that a larger portion of residents stay with friends and relatives. The type of accommodation utilized by resident travelers is assumed to be as follows over the course of the year:

Hotels, Motels, Lodges	40%
Campgrounds	10%
Friends and Relatives	45%
Camps etc.	5%

The Study Team's estimates of NWT tourism in 1984 are provided in Exhibit 9.3.

Under these hypotheses, the origins of visitors by season and for the full year are estimated as follows:

	Summer		Winter		Total	
	No.	%	No.	%	No.	%
Alberta	17,500	35	11,24?0	40	28,700	37
British Columbia	6,000	12	4,200	15	10,200	13
Ontario	7,500	15	5,000	18	12,500	16
Other Canada	7,000	14	4,500	16	11,500	15
United States	10,000	20	2,800	10	12,800	16
Offshore	2,000	4	300	1	2,300	3
Total	50,000	100	28,000	100	78,000	100

The estimates indicate that visitors and residents generated 158,000 person-trips and expenditures totalling $116 million in 1984. Business travel accounted for 62% of person-trips and 77% of total tourism expenditures. Daily expenditures by a typical traveller are close to $100"-- well above the average daily figures for British Columbia and Alberta. Compared to British Columbia, the NWT figure is higher by four times. This difference can be explained by several factors:

inflation (close to 60% from 1979 to 1984)
higher cost of living in the NWT (perhaps 50% higher)
greater importance of business travel in the NWT
more use of the airplane for travel.

The final two rows of Exhibit 9.3 indicate the person-night and room-night demand for accommodation. One consistency check is to establish occupancy rates by comparing accommodation demand with accommodation supply. Occupancy rates can then be compared with actual experience to see if demand estimates (and other parameters used to derive accommodation demand) are realistic. These comparisons are provided below for the full year and for summer and winter separately. Person-night and room-night supply are divided between year-round accommodation and seasonal accommodation (assumed to operate an average of 80 days per year). The supply figures are taken from the Explorers Guide.

	Year-Round	Summer[1] (June-Sep)	Winter (Ott-May)
Person-Night Demand	472,000	202,700	269,000
Person-Night Supply			
- Year-Round Capacity	2,872	2,872	2,872
- Year-Round Person-Nights	1,048,000	350,000	698,000
- Seasonal Capacity	897	897	
- Seasonal Person-Nights	72,000	72,000	
Total Supply	1,120,000	422,000	698,000
Demand as % of Supply	42%	48%	39%
Room-Night Demand	289,400	109,900	179,500
Room-Night Supply			
- Year-Round Units	1,327	1,327	1,327
- Year-Round Room-Nights	484,400	161,900	322,500
- Seasonal Units	299	299	
- Seasonal Room-Nights	23,900	23,900	
Total Supply	508,300	185,800	322,500
Occupancy Rates	57%	59%	55%

[1] Resident demand is divided 40/60 between summer and winter.

Although precise estimates of occupancy rates are not available from published sources, the rates indicated above are consistent with "hearsay" evidence on occupancy in hotels, motels, and lodges operating in the NWT.

Data from other studies have been supplemented by data collected by the Study Team in field interviews to develop estimates of tourism visitations and expenditures in the

EXHIBIT 9.4: ESTIMATES OF VISITATIONS AND EXPENDITURES IN ARCTIC COAST TOURISM: 1984

	Visitors			NWT Residents			Both Groups		
	B	P	T	B	P	T	B	P	T
Parties	560	360	920	670	100	770	1,230	460	1,690
Party Size	1.8	2.8	2.2	1.8	3.0	1.9	1.8	2.8	2.1
Total Person-Trips	1,000	1,000	2,000	1,200	300	1,500	2,200	1, 300	3,500
Average Length of Stay	16	10	13	7	7	7	11	9	10
Total Person-Nights	16,000	10,000	26,000	8,400	2,100	10,500	24,400	12,100	36,500
Per Diem Expenditures ($)	150	90	125	130	80	120	140	110	130
Total Expenditures ($ Million)	2.4	0.9	3.3	1.1	0.2	1.3	3.5	1.1	4.6
Person-Nights in Hotels, Lodges, etc.	9,600	6,000	15,600	4,200	1,000	5,200	13,800	7,000	20,800
Room-Night Demand[1]	4,800	3,000	7,800	2,100	500	2,600	6,900	3,500	10,400

B = Business P = Pleasure T = Total

[1] Averge of 2.0 people per room.

Arctic Coast Tourism sector. Estimates provided in Exhibit 9.4 are based on the following assumptions:

(1) As stated elsewhere in this document, the total number of pleasure visitors to the region is 1,000. This constitutes 50% of the total number of person-trips by visitors to the Arctic Coast. Reflecting the region's higher cost of living, average per diem expenditures are 25% to 30% above the NWT average. Daily expenditures for business travelers are $150 and for pleasure travelers $90. Average length of stay is 16 days for business visitors and 10 days for pleasure visitors. (Because of the time and expense involved in getting to the Arctic Coast, visitors are likely to stay longer.) Average party size is the same as for the NWT as a whole. 60% of visitors stay at sheltered accommodation, and 40% stay with friends and relatives or at camps.

(2) hWT residents visiting the Arctic Coast total 1,500, divided 80/20 between business and pleasure. Daily expenditures are $130 and $80 for business and pleasure travelers. Average party size is 3 for pleasure travelers and 1.8 for business travelers. Both groups stay an average of 7 days in the Arctic Coast. Accommodation is divided 50/50 between sheltered accommodation and other forms of accommodation.

(3) Except for visitors going down the Coppermine River, the mode of entry is by air for all travelers.

The estimates highlight' the small role played by the Arctic Coast in the NWT tourism sector. When visitors and residents are combined, the region accounts for 2.2% of total person-trips in the NWT. The region's share is the same for both business and pleasure visitors. The Arctic Coast's share for NWT tourism expenditures, at 4.2%, is somewhat higher, but is still well below the Arctic Coast's 7% share of the total NWT population.

The estimates suggest the following for accommodation occupancy in the Arctic Coast:

	Person-Nights	Room-Nights
Demand	**20,800**	**10,400**
Supply		
Year-Round Capacity/Units	**172**	**71**
- Year-Round Nights	**62,800**	**25,900**
Seasonal Capacity/Units	**56**	**20**
- Seasonal Nights	**3,700**	**1,300**
Total Supply	**66,500**	**27,200**
Demand as % of Supply	**31%**	**38%**

The occupancy rates are consistent with actual experience in the Arctic Coast, although the regional averages above may be above the rates experienced by facilities in small settlements in the region.

Although no data are available that allow us to distribute tourist visitations among the seven communities in the Arctic Coast region, data collected in the field interviews can be used as a guide.

About 100 pleasure visitors are accommodated each year at the Bathhurst Inlet Lodge. The Chantrey Inlet Lodge and High Arctic Lodge each accommodate another 50. (Visitors to the latter pass through Cambridge Bay.) In recent years, up to 100 visiors travelled down the Coppermine River, landing at Coppermine. Another 50 visitors travel down other rivers in the Arctic Coast region. Up to 200 tourists visit Cambridge Bay each summer as part of informal tours sponsored by industry groups and service clubs (often out of Edmonton). Up to 50 big game hunters are reported each year on Holman Island. Few other tourists come to Holman. (Two "real" tourists were reported this year.) The same group of 8 tourists visited Gjoa Haven and Spence Bay last summer, and virtually no tourists visited Pelly Bay. In the past, one-day tours -- usually out of Toronto-- visited Pelly Bay and Holman. No tours visited these communities in the past year.

Other pleasure tourists visit friends and relatives, largely concentrated in Cambridge Bay and Coppermine. Cambridge Bay, with its growing government sector now posseses a fairly large non-native population and accommodates the largest portion of government and business travel.

Another source of tourism dollars in 1984 was the trip of the Swedish cruise ship, the Lindeblad Explorer, through the Northwest Passage. The 92 passengers aboard paid an average of $120,000 each to travel across the Arctic Archipelago on the specially designed cruise ship. The 42-day cruise began in St. John's on August 20 and ended in Yokohana, Japan on September 29, 1984. Within the Arctic Coast, the ship anchored at Fort Ross, passed through the James Ross Strait, and landed at Cambridge Bay. Sales of handicrafts were reported to be very high wherever the ship landed.

To summarize, Cambridge Bay accounts for up to 40% of the tourist visitations indicated in Exhibit 9.4. Coppermine accommodates about 20% to 25%, and the remainder is distributed among the five other communities, depending on population and proximity to attractions.

Projections of tourist visitations and expenditures are provided in Exhibit 9.5 for the total NWT and the Arctic Coast Tourism Region. The projections are provided in detail for 1994. The major indicators are displayed in Exhibit 9.6. All dollar figures are based on constant 1984 values. The 1993 NWT projections are based on the following assumptions:

- Business travel into the NWT and by NWT residents will expand "in line with the growth in employment and territorial product. Gross territorial product is expected to expand by 3-6% per year over the ten year period, with the actual value depending on whether the Beaufort, Polar Gas, and other proposed projects proceed as planned. For this analysis, we have assumed that business travel will expand by 4.5% per year through

EXHIBIT 9.5: PROJECTIONS OF TOURISM VISITATIONS AND EXPENDITURES IN THE NWT AND ARCTIC COAST: 1994

	NWT			Arctic coast		
	Visitors[1]	Residents	Total	Visitors[1]	Residents	Total
Parties[2]						
- Business	33,200	51,800	85,000	670	830	1500
- Pleasure	22,500	13,000	35,500	400	120	520
- Total	55,700	64,800	120,500	1070	950	2020
Party Size						
- Business	1.8	1.8	1.8	1.8	1.8	1.8
- Pleasure	2.5	2.5	2.5	2.5	2.5	2.5
- Total	2.1	1.9	2.0	2*1	1.9	2.0
Person Trips						
- Business	59,800	93,200	153,000	1200	1500	2700
- Pleasure	56,300	32,600	88; 900	1000	300	1300
- Total	116,100	125,800	241,900	2200	1800	4000
Person Nights						
- Business	837,200	372,800	1210,000	19,200	10,500	29,700
- Pleasure	450,400	130,400	580,800	10,000	2100	12,100
- Total	1287,600	503,200,	1790,800	29,200	12,600	41,800
Total Expenditures ($ Million)						
- Business	100.5	37.3	137.8	2.9	1.4	4.3
- Pleasure	31.5	7.8	39.3	0.9	.2	101
- Total	132.0	45.1	177.1	3.8	1.6	5.4
Number of Parties on Package Tours	1670		1670			
Room Nights in Hotels/Motels/Lodges	518,100	201,300	719,400	17,500	6300	23,800
Room Night Demand	304,800	134,200	439,000	8800	3100	11,900

[1] For the full year.
[2] 1.7 people per room for visitors and 1.5 people per room for residents for NWT; 2.0 per room for Arctic Coast.

EXHIBIT 9.6: YEAR TO YEAR CHANGES IN THE MAJOR TOURISM INDICATORS: NWT AND ARCTIC COAST

	NWT			Arctic coast		
	Parties	Person Trips	Expenditures ($ Million)	Parties	Person Trips	Expenditures ($ Million)
1984	75,500	158,000	115.6	1690	3500	4.6
1985	79,100	164,900	120.6	1720	3550	4.7
1986	82,900	172,000	125.9	1750	3600	4.8
1987	86,900	179,500	131.4	1780	3640	4.8
1988	91,000	187,300	137.1	1810	3690	4.9
1989	95,400	195,500	143.1	1850	3740	5.0
1990	100,000	204,000	149.3	1880	3790	5.1
1991	104,800	212,900	155.8	1910	3840	5.1
1992	109,800	222,100	162.6	1950	3890	5.2
1993	115,000	231,800	169.7	1980	3950	5.3
1994	120,500	241,900	177.1	2020	4000	5.4

N.B. All figures are for the full year

1994. Pleasure travel by NWT residents will expand by a somewhat higher rate, 5%, reflecting the tendency for expenditures on travel to increase faster than total personal income.

- Growth in pleasure visitors is strongly linked to the expected growth in gross product and personal incomes in the NWT'S major markets. Many of these markets, especially those in Western Canada, are not expected to display more than 3% annual growth in gross product and income for the foreseeable future. Sluggish growth in major markets could dampen NWT tourism gains, but other developments are more encouraging:
  - the high income elasticity of demand for travel products;
  - the NWT's increasing recognition in the marketplace;
  - the demographic shifts discussed earlier;
  - growing penetration of rapidly expanding offshore markets.

  For these reasons, we have projected that pleasure visitors into the NWT will expand by 3.6% per annum through 1994.

- Average party size for pleasure tourists is expected to fall to 2.5, the result of smaller family sizes and the growing number of retired people and "empty nesters" who travel. The number of summer visitor parties on pacakage tours will grow from 3% to 5%, in line with industry trends. Other parameters are assumed to remain constnt at "1984 levels. The Study Team recognizes that GNWT program initiatives could influence the per diem expenditures and length of stay of visitors, but studies have not identified the magnitude of these impacts.

For the total NWT, person trips by residents and visitors are projected to increase by 4.3% per year over the ten year period. Resident travel displays annual gains of 4.6%, and visitor travel increases by about 4% per annum. Average annual growth rates for the major indicators are as follows:

		%
Expenditures :	Visitors	4.3
	Residents	4.6
	Total	4.4
Person nights in hotels, etc.		4.3
Room nights demand		4.3

The growth in room night demand could suggest the need for considerable investment in accommodation facilities over the ten year period. At 60% occupancy, the projection suggests an additional 680 rooms could be needed by 1994. This would represent a 50% advance over current capacity. Finally, the projections suggest the number of parties on tour packages entering the NWT could more than double from 640 to close to 1700.

For the Arctic Coast, business travel is expected to display slow growth of 2% per annum. Smaller gains compared to the total Territories reflects the weakness of the region’s economic base. No gains are anticipated for pleasure tourists, the result of the lack of tourism facilities, services, and products in the region, and the probability that no development will occur in the absense of a tourism plan.

The projections suggest much slower growth for the Arctic Coast tourism sector. Projected average annual increases in the major indicators are:

		%
Person Trips:	Visitors	1.0
	Residents	1.8
	Total	1.3
Expenditures:	Visitors	1.4
	Residents	2.1
	Total	1.6
Person nights in hotels, etc.		1.4
Room night demand		1.4

In the absense of an Arctic Coast tourism plan, the travel sector would make a very modest contribution to the development of the regional economy, and the Arctic Coast's share of NWT tourist activity would fall even further. The percentage of total person-trips (visitors and residents) accommodated by the region would fall from 2.2% in 1984 to 1.7% in 1994, and the region's share of tourism expenditures would decrease from 4.2 to 3.0%. In light of the low occupancy rates in many accommodation facilities in the region, the increase in room night demand can probably be absorbed with little or no investment in the accommodation sector.

9.5 Markets and Market Strategies

This final subsection describes the potential markets and marketing strategies for the Arctic Coast tourism plan. the markets are divided between primary and secondary markets. There is some overlap between market segments.

Primary Markets and Strategies to Encourage their Growth

1. Naturalists and conservation groups have shown an interest in the wildernes experiences offered in some areas of the NWT. These groups can be attracted to properly packaged products offered by the Arctic Coast. Some of these potential visitors have participated in outdoor experience oriented trips to exotic locations (e.g., hiking in the Andes) and are looking for a totally different experience. Others are attracted by the opportuntiy to observe unique species of plants and wildlife in their natural environment.

   In Canada there are a number of diversified non-profit societies and associations which focus on conservation issues, wildlife preservation, and nature observation. The combined membership in the following four national conservation and naturalist organizations has been used to estimate the core Canadian population with an active interest in the above topics: The Canadian Nature Federation, the Canadian Wildlife Federation, the Sierra Club (Canadian chapters), the Greenpeace Foundation. After removing the memberships which are primarly sports fishing or hunting oriented, the Canadian membership is conservatively estimated to be 500,000.

Based on the memberships of several large national conservation organizations in the United States, the American market would appear to reflect the larger population base (i.e., about ten times the Canadian figure). The American market is much more specialized, and, as such, organizations with unique wildlife interests can be more easily targeted (i.e., whale watchers) .

2. The mystique of the North, the Franklin Expedition, the Innuit culture, and other related products available in the Arctic Coast can be packaged to attract visitors with historical, cultural, or anthropological interests. Unlike the conservation-oriented groups, there is little national representation of lay groups with these interests in Canada. The Learned Societies are well represented nationally, however, and their membership participates regularly in special interest symposiums, which have included topics on the Canadian North. The size of the Learned Societies' membership in groups with a potential interest in the North has been estimated to be 6,000. Based on population alone, a similar American figure can be expected to be at least 10 times larger.

3. As described in an earlier section, the number of parties and visitors traveling to the NWT through commercial travel packages could more than double over the next decade. Further expansion could occur through the tourism promotion efforts of Tourism Canada, the GNWT, and regional tourism associations. Py the early 1980s,

package tours could generate 2000 tourist parties and 5000 person trips. Arctic Coast tourist groups and operators must work closely with government officials and tour operators to: ensure that Arctic Coast communities are included in the itineraries of groups visiting regions, and to develop tour packages specifically directed towards the Arctic Coast (either one or several communities) . The latter could focus on clubs, societies, and groups interested in the wilderness experience and historical/cultural opportunities offered by the Arctic Coast (as discussed above).

4. Canoeists on the Coppermine River and visitors to the Bathurst Inlet Lodge and other lodges could be encouraged to extend their stay and experience the community-based products offered by the Arctic Coast hamlets. These visitors currently represent about 30-40% of the total number of pleasure visitors to the region each year. If their stay could be extended for an average of three days each, tourism expenditures provided by the pleasure visitor market would increase by a minimum of 10% or about $110,000 .

5. Business and government travelers to Yellowknife and other major NWT centers could be encouraged to stay a. few extra days to visit a different part of the Northwest Territories, such as the Arctic Coast. Business travel to the NWT is estimated to total 39,3017 person trips for the full year of 1984, and is estimated to increase to nearly 60,000 person trips by 1994. Even if only 1% of this market could be attracted to the Arctic Coast, this would represent a 50% gain in the number of pleasure tourists to the Arctic Coast by the early 1990s.

60 Non-NWT residents visiting friends and relatives in Yellowknife, Inuvik or other major NWT centers could be encouraged to stay a few extra days and add a side-trip to the Arctic Coast. Pleasure tourists staying with

EXHIBIT 9.7: **PRIVATE HOUSEHOLD INCONE,** BY INCOME RANGE, 19

	All			
	Under $5000	$5000 9999	$10,000 14,999	$1 1
Total Canada	629,500	1,116,830	1,051,125	1,
% of all households	7.6	13.5	12.7	
Vancouver CMA	30,555	60,410	53,370	
% of all households	6.4	12.7	11.2	
Calagary CMA	10,175	19,285	24,185	
% of all households	4.8	9.1	11.5	
Edmonton CMA	11,855	21,145	22,710	
% of all households	5.6	10.0	10.8	
Winnipeg CMA	19,110	27,835	28,505	
% of all households	9.0	13.2	13.5	
Toronto CMA	58,105	103,555	111,730	
% of all households	5.6	10.0	10.7	
Montreal CMA	98,890	132,195	126,735	
% of all households	9.6	12.9	12.3	
NWT	985	1,265	1,170	
% of all households	8.5	11.0	10.1	
Baffin	145	220	240	
% of all households	8.5	12.9	14.1	
Central Arctic	90	145	115	
% of all households	13.3	21.5	17.0	
Fort Smith	455	545	51,0	
% of all households	7.1	8.5	7.9	
Inuvik	190	215	190	
% of all households	10.2	11.6	10.2	
Keewatin	100	145	[illegible]	

friends and relatives total 10,000 people at the present time. This number will increase in line with overall pleasure tourism growth to exceed 14,000 by the early 1990s. Again, a 1% market share by the Arctic Coast would significantly enhance the region's tourism sector.

7. Travelers by car, RV and bus up the Mackenzie could be encouraged to leave their vehicles and fly to a more remote part of the north (this would involve a drive-fly package). Of the 33,000 or so pleasure tourists entering the NWT each summer, about 20% are in a truck camper or other form of recreation vehicle and probably stay a majority of their time at campgrounds. Another 2% enter by bus. This market segment is expected to grow from about 7,000 person trips at the present time to more than 10,000 person trips by the early 1990s.

8. Residents of Yellowknife, Whitehorse, Inuvik, and other large northern centers -- typically with professional jobs and above average incomes -- may wish to experience another part of northern Canada, especially above the tree-line and on the Arctic Ocean. Exhibit 9.7 indicates that in 1980, 4,390 households in the NWT and Yukon had household incomes of more than $40,000; 2600 or 60% of these households were concentrated in two centers, Whitehorse and Yellowknife.

The primary markets include specialized market segments that already have a strong interest in the travel products offered by the Arctic Coast (markets #1 through #3 above) and people who are already traveling to the north or are residents of the north (markets #4 through #8 above). Both sets of markets are easy to identify and should be relatively easy to cultivate. The secondary markets described below are more diffused geographically, more difficult and expensive to promote, and may just begin to emerge.

Secondary Markets and Strategies to Encourage their **Growth**

9. **Some** upper-middle and upper income Canadian families (often with **two** incomes and 0-2 children, may be interesed in a "trip of a lifetime" to the true Canadian north. These potential tourists could be attracted *by* natural attractions close to communities, as well as the cultural experience provided by living in a northern community. These tourists are happy to "rough it" **during** the days, but at night often want to stay at a facility that offers a restaurant, wine with dinner, and other services and amenities. Exhibit 9.7 indicates that in **1980** 1.2 million Canadian households had a household income of $40,000 or more. Close to 50% of these households were concentrated in six metropolitan areas: Vancouver, Calgary, Edmonton, Winnipeg, Toronto, and Montreal.

10. A growing number of major corporations are offering **free** vacation trips as incentives to employees to enhance sales or productivity. TWO aspects of the incentive travel market could be of interest to the Arctic Coast:

    i) Major corporations with some involvement in the Arctic Coast could provide incentives to **travel** within the region as part of the wage and benefit package paid to executives, professionals, and senior technical staff.

    ii) Major resource developers often employ workers from southern Canada on a rotation basis. This generally involves free **flights** back to t-he home community once every two to four weeks. As an alternative, **these** companies could be encouraged to bring workers' families north once a year for a vacation at an Arctic Coast destination. A family vacation in the north **would** allow worker's wives and children to develop a better understanding of and appreciation for the area where their father works.

Few people currently visit the NWT as part of an incentive travel package from employers. The size of this market in the future will depend on the size and timing of development projects that proceed in the NWT and the combined marketing efforts of the GNWT regional tOUriSm zones, and private tourism operators. If medium-scale development proceeds on the Beaufort and the construction of the Polar Gas pipeline takes place near the end of the decade, 4000 to 6000 workers living in southern Canada could be working in the NWT on a rotation basis by 1990. If incentive travel was part of the compensation package for about one-half of these workers, this market segment could generate perhaps 5000 person trips into the NWT by 1990.

11. Specialized segments of the offshore market could be promoted by the Arctic Coast. Attention could be given to West Germany (because of interest in wilderness and related experiences) and to Japan (highest income growth of any offshore market and growing propensity to travel). The activity markets of interest would be the same as for North America: wilderness, environmental, naturalist, and historical groups and societies.

12. The hardy traveller could be encouraged to visit the Arctic Coast during the shoulder and winter seasons to experience the north as it really is through most of the year. The April to June period offers the greatest potential in this regard. The days are long and often sunny (although a little brisk), and going out on the land by ski-doo is easy. The weather in the Fall (from September) is too varible and travel is more difficult.

Estimating market penetration factors for the Arctic Coast for these market segments must be done with great care. Market penetration will depend on the travel products actually developed, the training and skills of tourist operators, and the market promotion programs of Arctic Coast

operators, the GNWT, and Tourism Canada (among many other factors). Speculation can be made, however, on what a 1% market share of certain markets might mean for pleasure travel to the Arctic Coast by the early 1990s. This hypothesis can be applied to the following markets.

Markets	**Person-Trips From One Percent Share**
3. Package tour groups	50
5. Business and government travel	600
6. Visiting friends and relatives	140
7. Travelers by truck, campers, RV etc.	100
8. High income families in NWT and Yukon	100
10. Incentive travel	50
	1040

A 1% share of these market segments would result in a doubling of the number of pleasure travelers entering the Arctic Coast by the early 1990s. This speculation could be extended to add another one to two thousand visitors from other market segments described above. Because tourism in the Arctic Coast is starting from such a low base, the potential exists to achieve strong year-over-year gains in tourist visitations and expenditures. This growth, however, will not come about automatically, and the “no-growth” scenario described in sub-section 9.4 remains the most likely outcome without a comprehensive tourism .implementation plan. Travel products need to be developed, training needs to be provided to local people, and marketing programs need to be prepared and implemented.

Market promotion strategies should include the following elements.

- Arctic Coast promotion should be strongly coordinated with the efforts of Tourism Canada, the GNWT, and other NWT zone associations, and maximum use should be made of the advertising and other promotion vehicles of the federal and territorial governments. Tourism Canada and

Travel Arctic largely emphasize the United States and offshore markets, suggesting the Arctic Coast could place greatest emphasis on Canadian market segments. Opportunities for joint product development and marketing should be pursued with other zone associations, tourist groups, and private sector operators in the Territories.

- Promotion dollars will be limited. Marketing efforts should be targetted on a comparatively few special interest groups, clubs, agencies etc. with a strong interest in the Region's tourism products, and on a relatively few tourism products.

  The latter would include the major urban centres in Western Canada plus Toronto and English speaking Montreal. Particular attention should be given to Toronto and Vancouver (major entry points for international travelers to Canada) and to Edmonton (the gateway to Canda's north). Promotion outside Canada should be assessed very carefully in terms of its cost effectiveness. If such promotion appears attractive, the market areas to be emphasized would include the U.S. border states, California, West Germany, other northern European countries and Japan.

- The Arctic Coast should work closely with wholesalers and retailers of package tours, to ensure the region is included in itineraries, to develop packages for group travel to the Arctic Coast, and to include the region in their promotional literature. Tours should be limited to a maximum of 20 people in order to be easily accommodated by the region. Travel wholesalers and retailers are becoming increasingly specialized. A relatively few should be selected to promote Arctic Coast travel packages.

- Intermediries are needed between local outfitters/ operators, and wholesalers and retailers of travel packages. These intermediries at the outset could be travel coordinators located in the Arctic Coast funded by the GNWT or the z-one association. Over time, the travel coordinators would be replaced by local people trained in tourism business skills.

Based on the results of this study a special promotional package should be prepared for presentation to the **NWT's** pavilion at Expo '86. Expo '86 will provide a unique opportunity to do market testing of the tourism trave concepts and products developed in this study. In order to **maximize** benefits from Expo '86, marketing plans must be developed well before 1986 and attractive tourism products must be available from 1986 on.

- The implications of deregulation should be discussed with airline companies, and the companies should be approached to consider mechanisms for lowering airfares for special group travel to the Arctic Coast.

- The type of promotion/advertising techniques to be employed will depend on the travel product and the target market. The types of programs which should be considered include: direct mail/specialized brochures to special interest groups; films or personal visit follow-ups to the same groups (if strong interest is expressed by the group); travel shows (only those which attract a specialized market for which the Arctic Coast has a product); participation in high profile special events; encouragement of magazine articles; C.B.C. features; T.V. film fillers; development and implementation of visitor preparation/awareness programs. These potential initiatives will be further described in the tourism implementation plan.

- Marketing concepts, advertising/promotion techniques, tour package development and promotion, and related marketing considerations, should play a prominant role in the training programs conducted as part of the tourism implementation plan.

- Market promotion efforts should take full account of the absorptive capacity of the Arctic Coast tourist industry. Tourism development should be readily handled without placing undue strain on community resources.

ECONOMIC IMPACTS OF TOURISM IN THE NWT AND THE ARCTIC COAST

The employment and income effects of tourism in a region are dependent upon:

- direct effects: the value added and jobs generated by the economic sector directly affected by tourism expenditures

- indirect or supplier related effects: the value added and jobs generated by the economic activities which supply goods and services to the sectors directly affected by tourism expenditures

- induced effects: the incomes and jobs resulting from the consumer spending of people employed as a direct or indirect result of tourism expenditures.

Value added is defined as the value of gross output minus purchased commodity inputs used and contract work by others. Value added includes wages and salaries, business profits, rents, interest charges, and returns to other factors of production. The ratio of value added to sales varies greatly between economic activities. Many Statistics Canada publications provide statistics that can be used to compute the ratio of value added to sales for different economic sectors. The publication mainly used here is Corporate Financial Statistics, 1980 (Statistics Canada 61-207).

Tourism expenditures are distributed among a number of economic sectors. The following indicates the NWT distribution (based on previous surveys), the estimated ratio of value added to sales for each, the ratio for total tourism expenditures (a weighted average of the sector ratios), and similar data for wages and salaries as. a % of value added.

	% of Tourism Expenditures	Value Added as % of Total Sales	Wages and Salaries as % of Value Added
Accommodate ion	25	44.8	62.1
Meals	15	40.5	46.2
Groceries	5	15.5	67.7
Auto	15	18.2	64.2
Other Transportation	15	44.1	6 0 a
Recreation	10	40.5	46.2
Gifts and Souvenirs	10	22.4	60.8
Other	5	20.9	58.3
Total: Tourism	100%	34.7%	58.1%

Because no information is available on the **sectoral** distribution of tourism expenditures in the Arctic Coast, the NWT distribution is also applied to the region. The Canada Employment Commission reported to the Study Team that average wages in the hospitality sector are about $6.00/hour, or about $12,000 per year. Because some sectors that are influenced by tourism, such as transportation, pay much higher wages, an annual average wage of **$16,000** is used in this analysis. Wages as a proportion of value added are estimated (above) at 58.1%. Therefore, value added per employee in the tourism sector is estimated at $27,500. The regional figure is assumed to be the same as the total NWT parameter.

Because of the high import leakages from the **NWT** economy and the Territories limited manufacturing base, the indirect or supplier related effects from tourism expenditures are limited. Indirect effects are generally related to the markups of wholesalers. In the wholesale sector, the ratio of value added to total sales is low, 13.0%. The only exceptions would be expenditures on repairs and maintenance and some purchases from the (relatively few) painters and food and beverage operators in the Territories. Taking these activities into account, the ratio of value added to sales for industries supplying to the tourism sector'is estimated to be 17.5%. Annual average wages are $26,600 (comparable to wages in the wholesale transportation and distribution sectors) and value added per employee is estimated to be $45,800.

The supplier related effects would be even lower in the Arctic Coast. It can be anticipated that a fairly significant portion of supplies would not go through the hands of a wholesaler, and the supplier related effects would be negligible. For the Arctic Coast, the assumption is that the value added that accrues to the community amounts to only 10% of the value of purchased commodities. Wages and value added per employee are assumed comparable to the NWT figures.

The Study Team estimated the induced income multiplier for the NWT using simulation results from NWTMODO, the **GNWT's** computer simulation model of the NWT economy in previous assignments. The induced income multiplier was estimated to be 1.18, implying that for cash dollar earned by tourism sector employees and employees of industries that supply goods and services to tourist operations, a further 18 cents is generated as income to the owners and employees of retail and other service enterprises in the NWT. Annual average wages in these service sectors are estimated at $15,000 and, with wages and salaries accounting for 58% of value added, value added per employee accounts to $26,000.

The induced income multiplier would be lower in the Arctic Coast, reflecting the even higher import leakages out of the region. It is estimated that the induced income effects would be 30% lower in the region compared to the total Territories. This provides an induced income multiplier of 1.13. Wage and value added figures are postulated to be the same as for the NWT total.

These parameters allow as us to estimate the income and employment effects of $100,000 in tourism expenditures in the NWT and the Arctic Coast.

	NWT	Arctic Coast
Tourism Expenditures	$100,000	$100,000
Direct Effects		
- Income	34,700	34,70a
- Jobs*	1.26	1.26
Indirect Effects		
- Income	11,400	6,500
- Jobs*	0.25	0.14
Induced Effects		
- Income	8,300	5,400
- Jobs*	0.32	0.21
Total Impacts		
- Income	54,400	46,600
- Jobs*	1.83	1.61

* on a person-year equivalent basis.

These parameters indicate that $100,000 of tourism expenditures in the NWT generate territorial income (largely wages and salaries and business profits) of 54,400, and 1.83 jobs (on a person year equivalent basis). The same tourism expenditures in the Arctic Coast provide regional income of $46,600 and 1.61 jobs. These impact parameters can be used to estimate the incomes and jobs generated by current and future tourism expenditures in the NWT and the Arctic Coast.

For example, suppose that an Arctic Coast Tourism plan were to increase the number of person-trips by pleasure tourists to the Arctic Coast by five times over the next ten years, from 1,300 at present (see Exhibit 9.4) to 6,500 in 1994. (Without a tourism plan, the number of pleasure tourists is expected to remain constant over this period.) The effect of this increase on tourism expenditures, income, and employment would be as follows:

	Total Tourism Expenditures ($000)	Income Impact ($000)	Employment Impact (No.)
NWT			
1984	115,600	62,890	2120
1994	177,100	96,340	3240
Arctic Coast			
1984	4,600	2,140	74
1994			
W/O Plan	5,400	2, 520	87
With Plan (One Hypothesis)	9,800	4,570	158

w/o = Without

The impact results suggest that at the present time tourism accounts, either directly or indirectly, for about 11% of the 19,000 or so jobs in the NWT. In the Arctic Coast, tourism contributes about 9% to the employment base of about 900. The hypothetical plan would add 71 jobs to the employment base of the region. The unofficial unemployment rate in the region is perhaps 20% or more. This plan effect would lower the unemployment rate from 20% to less than 14%. The hypothetical plan impact is displayed here only for purposes of illustration. The results of plan implementation will be further refined and calculated in subsequent phases of this study.

10. SYNTHESIS

The synthesis is a refinement of the natural, heritage and social/ cultural resource ·nventory and analysis as well as the market data. For the purpose of clarification it is presented in terms of issues, trends, opportunis'< es and constraints.

10.1 OVERALL REGION

Issues are those factors that surface as the most important items to be dealt with in a tourism strategy. For the most part they have been defined through the interview process and given priority based on their importance to the economic viability and long term growth potential of the tourism industry. The strategy for tourism development in the Arctic must respond to the issues.

Trends are projections in future tourism and demand. There are no available statistical data to make accurate or empirical statements of regional trends.

Trends are based on information gathered through interviews, as well as the consultant's experience and knowledge of overall shifts in the industry, and access to intentional , national and territorial **travel** documents.

Opportunities refer to the potential development options that would respond to the issues. As such, they become the basis of the tourism strategy. At this stage of the planning process, they can be divided into three categories.

- those actively being considered;
- those about to be developed; and
- those that would seem to obviously respond to needs in the Arctic Coast tourism industry.

Development opportunities are presented in the background document because they have surfaced as part of the inventory, analysis, and synthesis process. Final selection will take place during the master planning process.

Constraints are those aspects that inhibit tourism development. Although specific constraints may be dealt with at the master planning stage, the overall barriers to successful tourism development are presented at the synthesis stage.

The data are provided here at both the global level as well as at the level specific to the various regional tourism components.

Issues and Trends

- the Arctic Coast receives a proportionally small segment (5%) of the travelers to the N.W.T. due to costs, lack of product and promotion;
- there is a wide selection of land and water-based activities;
- there has been relatively little promotion of the region;
- there are virtually no developed attractions in the region;
- while there are many people willing to work in the tourism industry, very few have had experience or training;
- increase marketing of the N.W.T. (e.g. Expo 86) will increase southern market appreciation of the Arctic environment and Inuit people;
- wilderness and traditional native cultures are becoming more popular travel attractions;
- more travelers visiting other regions of the territories will want a complete Arctic experience; and
- due to the higher risk of traveling in the north most activities require guides.

Opportunities and Constraints

- the Arctic Coast Region has a number of valid themes and resources that can be promoted to several specialty groups or target markets.

They include:

Heritage (Inuit)

- Archaeological sites
- Thule houses
- Tent rings
- Entertainment

Heritage (European)

- Explorer routes
- Franklin Expedition
- R.C. Missionaries
- Hudson's Bay Company

Wilderness

- Coppermine canoe route
- Boothia Peninsula
- Bathurst Inlet

Arctic Environment

- Each Destination Area
- Marine life - whales
- Flora and fauna
- Tundra

Traditional Inuit Lifestyle

- Each Community
- Games
- Craft
- Storytelling
- Survival

- the essential infrastructure (airports, water, etc.), are in place and can accommodate tourism growth;
- each community has shown enthusiasm for tourism and its leaders can readily identify tourism opportunities. Gjoa Haven, Spence Bay, Pelly Bay and Coppermine are very enthusiastic while Holman is moderately and it is difficult to detect an interest in the travel industry (other than a few individuals) in Cambridge Bay;
- package tours represent cost savings for travel in the north and there are usually enough boats, snowmobiles and sleds to satisfy the requirements of small groups;
- partial development funds are potentially available through the EDA - (Economic Development Agreement) to stimulate tourism development;
- business and government travel represent a market that can be immediately tapped;
- because there is no substantial tourism industry, it will be necessary to develop certain skills in tour organization, facility management, product development, promotion etc.;
- the harsh winters mean there is little opportunity for tourism during a four month period. The spring however is excellent for traveling and snow-based activities; and
- deregulation will affect the price of getting to northern gateways such as Winnipeg and Edmonton but will not affect prices north of 60°.

10.2 REGIONAL TOURISM COMPONENTS

The issues, trends, opportunities, constraints will be classified according to the following tourism components:

- attractions and events;
- accommodation and food services;
- transportation;
- information services;
- entertainment and traditional activities;
- tourism organization; and
- human resources.

10.2.1 Attractions and Events

Issues and Trends

- there are very few man-made tourism attractions; travelers are drawn to the region because of its pristine wilderness environment and the authentic native culture;
- several natural and cultural attractions have been suggested in each community;
- despite the fragility of the Arctic environment, it would appear that through proper tourism management this region will be able to maintain its wilderness character;
- continued wildlife management would maintain a stable population of important animals such as caribou, polar bear, whales, muskox, etc.; and
- the Northwest Passage exploration and other explorer themes are well known to special interest European and Canadian markets.

Opportunities and Constraints

- each destination area has a mix of potential natural and cultural attractions that could be developed in the short and mid term;
- attraction development can preserve existing traditional values and restore historic features and sites;
- there are many archaeological sites and a select number could be restored in their original state, i.e. Thule Village, stone houses, tent groups, etc.;
- increased demand for more comprehensive nature and cultural interpretation programs will create pressure for tourism attraction development;
- Northwest Passage Exploration sites (Franklin, Amundsen) offer numerous development opportunities and many are located on King William Island; and
- many of the artifacts associated with European and Inuit history are in private collections or museums outside the region.

10.2.2 Accommodation and Food Services

Issues and Trends

most communities have satisfactory accommodation. Only Coppermine and Spence Bay require upgrading and immediate replacement of the honey buckets;
while accommodation is mostly new many tourists object to sharing rooms;
accommodation demand is extremely seasonal and while some properties may be closed for several weeks in the winter, it sometimes is difficult for travelers to find accommodation during the peak season;
- food preparation has greatly improved over the past few years, yet it is still characterized by a limited menu and uninspiring dishes, despite relatively high costs;
tourists will increasingly demand well prepared food and traditional meals; and
Co-op training courses for hotel staff seem to be enjoying reasonable success and should be continued yet there still is the problem of continuous service in Spence Bay.

Opportunities and Constraints

peak season demand could be met with quality seasonal accommodation units (e.g. tent frames) to be used in the summer season at campgrounds such as in Coppermine;
greater use could be made of well prepared local foods especially during those seasons when they are most available; and
the hotels should be more involved in tourists reception and package tours.

10.2.3 Transportation

Issues and Trends

although high travel costs will continue to restrict visitation to select specialty groups, there will be a growing demand for the exclusive Arctic environment experience; and

- despite old equipment, NWT Air provides adequate service considering the present low tourist volume.

Opportunities and Constraints

small package tours will become more popular allowing each community to develop its own tour product and sell it collectively as part of the Arctic Coast Region;

the airlines could become more involved in the development of the product; and

NWT Air could work more closely with the major southern carriers to develop joint packages and co-operative promotion.

INFORMATION SERVICES

issues and Trends

many of the potential target markets are relatively uninformed about the characteristics and features of the Arctic environment and the Arctic Coast Region;

distribution of travel information on the Arctic Coast Region has been focussed on one attractive brochure. For the most part it is a region largely unknown to many of the influencers in the travel industry; and

as the potential products and markets become better defined, it will be possible to more effectively distribute quality information.

Opportunities and Constraints

more information on each community could be distributed at each of the hotels via a travelers bulletin board; and

larger hamlets such as Cambridge Bay and Coppermine should have a central information service for both the community and the entire region.

ENTERTAINMENT AND TRADITIONAL ACTIVITIES

Issues and Trends

- the Inuit values and lifestyle are one of the last remaining traditional cultures in the northern hemisphere;
- most travelers to the Arctic are traveling without children and are looking for evening entertainment, including short tours (three wheelers, fishing or a lounge);
- the Arctic's native population is collectively interested in preserving the traditional ways;
- new concerns for heritage values are bringing back many traditional entertainment activities; and
- the more educated and sophisticated population in the western world is increasingly interested in indigineous cultures.

Opportunities and Constraints

- Inuit people are increasingly concerned with the protection of their heritage and tourism development offers one means of reaffirming and relearning their cultural values;
- each community has maintained certain traditional activities and could readily produce an entertainment or games package for small tourist groups; and
- festivals, games and frolics could be more frequent during the tourist season.

TOURISM ORGANIZATION

Issues and Trends

- regional tourism development is based on collaboration and communication between the various communities;
- the region is fortunate to have an Arctic Coast Tourist Association and a Regional Tourism Development Officer;

- these regions that are organized compete more successfully for tourists than those that are unorganized;
- tourists are looking for a cohesive, balanced travel package when choosing a particular region; and
- it is important to define the distinct roles of the Regional Tourism Development Office and the Arctic Coast Tourist Association.

Opportunities and Constraints

- the great distance between the communities makes communication difficult for the Arctic Coast Tourist Association;
- the communities are not accustomed to collaborating with a central body or agency; and
- the implementation of the regional development strategy will be facilitated by a strong regional tourism office and the Arctic Coast Tourist Association.

HUMAN RESOURCES

Issues and Trends

- because there have been so few tourists to the region, and consequently few tourist operators, there is virtually no tourism expertise in the Central Arctic;
- there is little appreciation of the mechanisms of the travel industry and how a northern product should be packaged and sold to southern markets;
- the people of the region are extremely hospitable and increasingly interested in receiving tourists to their community;
- there is a definite eagerness by certain individuals* to increase tourism in the region, especially to provide eventual employment for the younger members of the community; and
- increased visitation will require qualified staff to respond to tourist demand for a high quality product.

* to be identified in master plan

Opportunities and Constraints

all efforts should be made to overcome the lack of tourism related skills by immediately introducing a responsive training program* in order to put the product in place to attract tourists; and

training funds could come from the EDA or Special ARDA. Courses should emphasize tourism organization, package tour development, facility management, marketing, hospitality/visitor needs, etc.

* to be identified in master plan

11. CONCEPT

An overall development concept is based on both the various images or themes of a region as well as the relationship and hierarchy of the development opportunities.

11.1 IMAGE

Canadas' Arctic Region is already characterized in the southern markets, by a series of abstract images that, taken collectively, produce an overall theme for the region. These images are best expressed by the following labels or words.

Arctic Coast
Arctic Ocean
Barrenlands
Arctic Circle
Treeline
Arctic Archipelago
Inuit Lifestyle
Northwest Passage
Dorset/Thule Culture
Native Crafts (soapstone, wall hangings, etc.)
Kitikmeot

The Arctic Coast has all the resources necessary to support these various images and can definitely respond to the existing and potential visitor expectations by providing:

an Arctic coastline and a variety of coastal resources that are only available in the Central Arctic, a combination of land, ice, community, and water-based activities that cannot be found in other competitive Arctic Regions (Wilberforce Falls, Northwest Passage Exploration);

a fascinating social, cultural and natural environment including features and lifestyles that appeal to those special interest groups and individuals interested in an Arctic experience;

- ample opportunity to observe and interpret that relationship between the Inuit people and the Arctic resources;
and a variety of arts and craft that are available in each community.

11.2 ALTERNATIVE THEMES

The selected theme of a region must reflect both the most important images as well as respond to the perceived target market expectations.

Two themes are proposed:
- Arctic Coast; and
- Inuit Culture.

Theme I - Arctic Coast

"Arctic Coast" reflects the existing name and tourism image presently promoted by the study region and it would be wise to continue with a theme that is already recognized. The "Arctic" image has a distinctive, competitive and internationally recognized connotation. "Coast" suggests those exclusive images associated with Canada's Atlantic and Pacific coastline including beaches, cliffs, islands, marine life, etc. as well as the opportunity to return to the sea and the northern edge of the North American continent. The coastline of the mainland and islands also ties the region together and provides a link between all the hamlets.

The combination of the words "arctic" and "coast" suggests one of the strongest images in the Northwest Territories and Canada.

"Arctic Coast" implies abundant natural resources (marine and terrestrial), European exploration, native nomadic movement and the establishment of communities.

As well, the Arctic Coast suggests several sub-themes including - the Northwest Passage Exploration, the Franklin Expedition, the Hudsons Bay Development, the Roman Catholic Mission Movements, etc.

Theme II - Inuit Culture

As southern travel markets become more experienced, sophisticated and culturally "aware", they will develop more interest in nonconsumptive native tourism activities.

Also, Inuit culture has become known to Canadians and the international markets through the sale of northern arts and craft. Although craft production is not exclusive to the Arctic Coast, certain communities such as Spence Bay have received much attention in the south.

Inuit culture and lifestyle , unlike the other indigineous cultures of North America, is still strongly rooted in its past and provides unlimited interpretation opportunities.

However, the Inuit people are not exclusive to the Arctic Coast region and many of the potential cultural/native tourism products will also be used by other regions including Baffin and the Western Arctic.

Therefore, although it is a strong theme, it is not exclusive and would be in competition with other regions.

11.3 ALTERNATIVE CONCEPTS

The overall theme will suggest the orientation of the development concept. Emphasis will be placed on those locations, attractions and services that correspond to the resources, images and the needs of the visitor. The concept will outline in schematic or general terms, the functional relationship between:

1. Destination Areas, including:

   service nodes
   - attractions
   - staging areas

2. Linkages

11.3.1 Destination Areas

Destination Areas are zones possessing opportunity to attract and hold tourists because of their features and facilities. They are usually centered on a particular hamlet, but may include a large area around the community.

Each one could be developed on a particular theme or sub-theme, such as:

1. Holman Destination Area

   Theme: Big Game Hunting
   Continuous promotion of trophy hunting for Polar Bear, Muskos, Caribou. Growth in Caribou and Muskox hunting.

   Sub-theme: Inuit Arts and Craft Production
   Expansion and marketing of existing and new products as well as the interpretation of techniques.

2. Coppermine Destination Area

   Theme: Coppermine River and Arctic Coastline
   Continuous promotion of canoeing/rafting on the Coppermine River as well as group tours out of Coppermine to Bloody Falls and/or along the coast (e.g. to Rae and Richardson Rivers).

Sub-theme: Hudsons Bay Company and Hearne Overland Expedition
General history of the trading and expeditions in the Central Arctic with an emphasis on the Hudsons Bay Company; specifically the trading post (1914) and Anglican Mission (1915) at Bernard Harbour and posts at the mouth of Coppermine River (1925).

3. Cambridge Bay Destination Area

Theme: Arctic Char Fishing
Expanding on the existing lodges and providing (through receptive tour operators) community-based fishing and touring opportunties.

Sub-theme: Central Arctic Administrative Centre
Interpretation of the various functions and facilities as well as the interaction of the modern and traditional lifestyles.

4. Gjoa Haven Destination Area

Theme: Northwest Passage and Scientific Expedition
King William Island provides the basis for a number of historical themes including the search for the Northwest Passage, the Franklin Expedition, the Search for the Franklin Expedition, the first successful crossing of the Passage by Amundsen and scientific exploration including locating the Magnetic Pole.

Sub-theme: Chantry Inlet Fishing
This high quality fishing lodge may be serviced and partially operated by Gjoa Haven.

5. Spence Bay Destination Area

Theme: Quality Arts and Crafts
Using the reputation of the crafts produced by Taloyoak Craft Shop and Sewing Centre, shopping and the interpretation of craft production (e.g. wool-dying, etc.), would be available.

Sub-theme: Boothia Peninsula Historical/Natural Tours
Interpretation of the coastline of the peninsula offers abundant opportunity for tours based on Franklin/James Ross/M'Clintock Expeditions, the Hudson's Bay at Fort Ross, marine and wildlife of the Bellot Strait, the Archaeological sites of Creswell Bay and Hazard Inlet.

6. Pelly Bay Destination Area

Theme: Inuit Culture and Lifestyle
Because of both the remoteness and aspirations of its people it provides a relatively authentic exposure to Inuit lifestyle including fishing, hunting, games, entertainment. Local archaeological sites also contribute to cultural interpretation opportunities.

Sub-theme: Roman Catholic Missions
Centered on the existing Stone Church Museum, the role of the Catholic Church in both the north and Pelly Bay could be presented.

7. Bathurst Inlet Destination Area

Theme: Nature Interpretation and Wilderness Experience
Based on the existing promotion of the area as well as recognition of national ecological importance of the site, the present orientation would be maintained. National designation should be investigated in order to assess socio-economic impact.

Sub-theme: History and Inuit Lifestyle

Interpretation of the role of the Burnside River in exploration, the Franklin Expedition, the lifestyle of the Inuit people at Bay Chimo and the year-round outpost camps such as Brown Sound can be used as attractions.

11.4 ALTERNATIVE DEVELOPMENT CONCEPTS

Two development concepts have been proposed. Each include seven destination areas, six of which focus on a particular community and one on the unique resources of Bathurst Inlet and both concentrate development along a 1,300 km coastal corridor of the Arctic ocean.

Each development concept promotes the idea of community-based tourism using the features of the hamlet to embark on such activities as.

- developing tours for fishing, hunting, cultural and nature interpretation, archaeological exploration;
- establishing expeditions to certain unique areas such as Bathurst Inlet, Minto Inlet, Boothia Peninsula, etc.; and
- creating opportunities for non-natives to appreciate and learn of the Inuit lifestyle.

The major difference between the two concepts results in how people can access the region and consequently how each destination area could be perceived as a staging area or service area.

ALTERNATIVE CONCEPT I

Overview

Cambridge Bay is both a service center for and a gateway to half the communities in the Central Arctic. Consequently it is possible to consider this hamlet as central “service” and “staging area” for the Arctic Coast Region. In other words, most visitor traffic would pass through Cambridge Bay.

Concept Components

This concept would include the following:

Service Nodes

Primary - Cambridge Bay
Secondary - Holman, Coppermine, Pelly Bay, Spence Bay, Gjoa Haven
Tertiary - Bay Chimo/Bathurst Inlet

Attraction Nodes

Primary - Cambridge Bay
Secondary - Holman, Coppermine, Pelly Bay, Spence Bay, Gjoa Haven, Bathurst Inlet

Staging Area

Primary - Cambridge Bay
Secondary - Holman, Coppermine, Pelly Bay, Spence Bay, Gjoa Haven
Tertiary - Bathurst Inelt Lodge, Bay Chimo

Linkages

Primary - Yel lowknife - Cambridge Bay
Secondary - Yellowknife - Coppermine and all lateral connections including Coppermine
Tertiary - Hall Beach to Pelly Bay
Cambridge Bay to Bathurst Inlet/Bay Chimo
Inuvik to Holman/Coppermine

CONCEPT II

Overview

This concept is more reflective of existing conditions and recognizes two significant, yet distinct links between Yellowknife and the Arctic Coast region. They are:

Yellowknife - Cambridge Bay
Yellowknife - Coppermine

As such, the region becomes more or less divided into two distinct sub-regions; the Western Sub-region, including the hamlets of Coppermine and Holman; and the Eastern Sub-region with Cambridge Bay, Spence Bay, Gjoa Haven and Pelly Bay. Bathurst Inlet is equidistant from Coppermine and Cambridge Bay and will be considered in both sub-regions.

Concept Components

Service Nodes

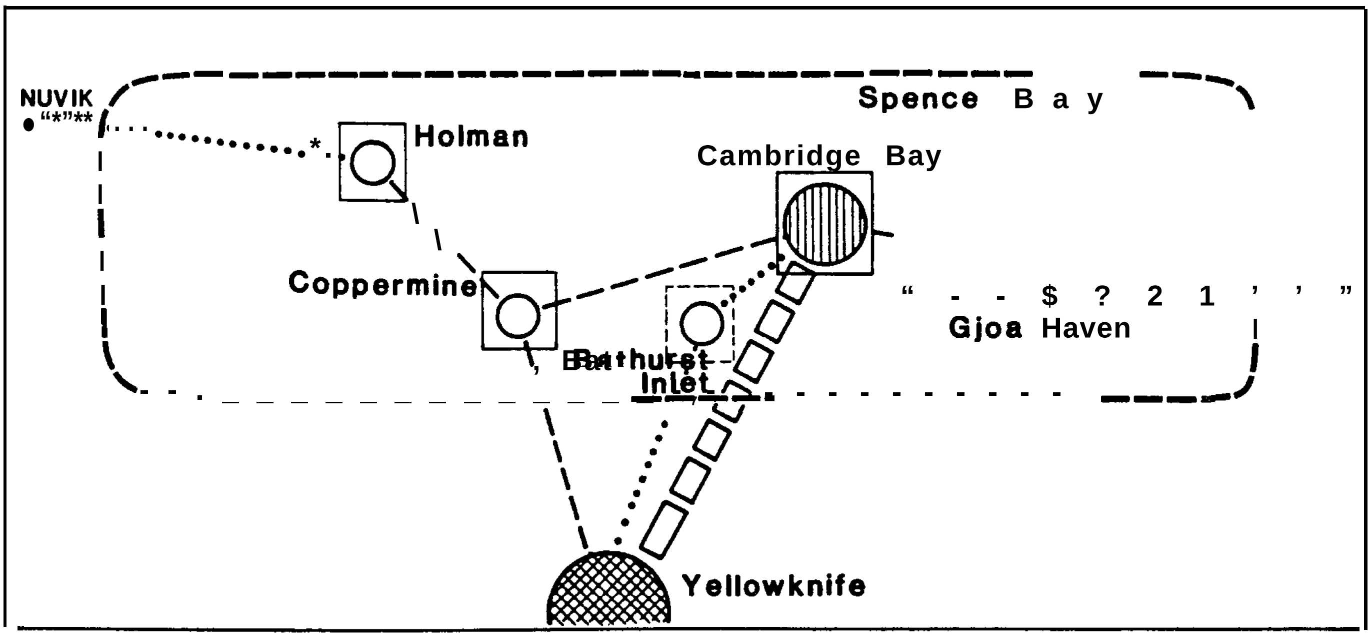
Primary - Cambridge Bay - Coppermine
Secondary - Holman, Gjoa Haven, Spence Bay, Pelly Bay
Tertiary - Bathurst Inlet/Bay Chimo

Attraction Node

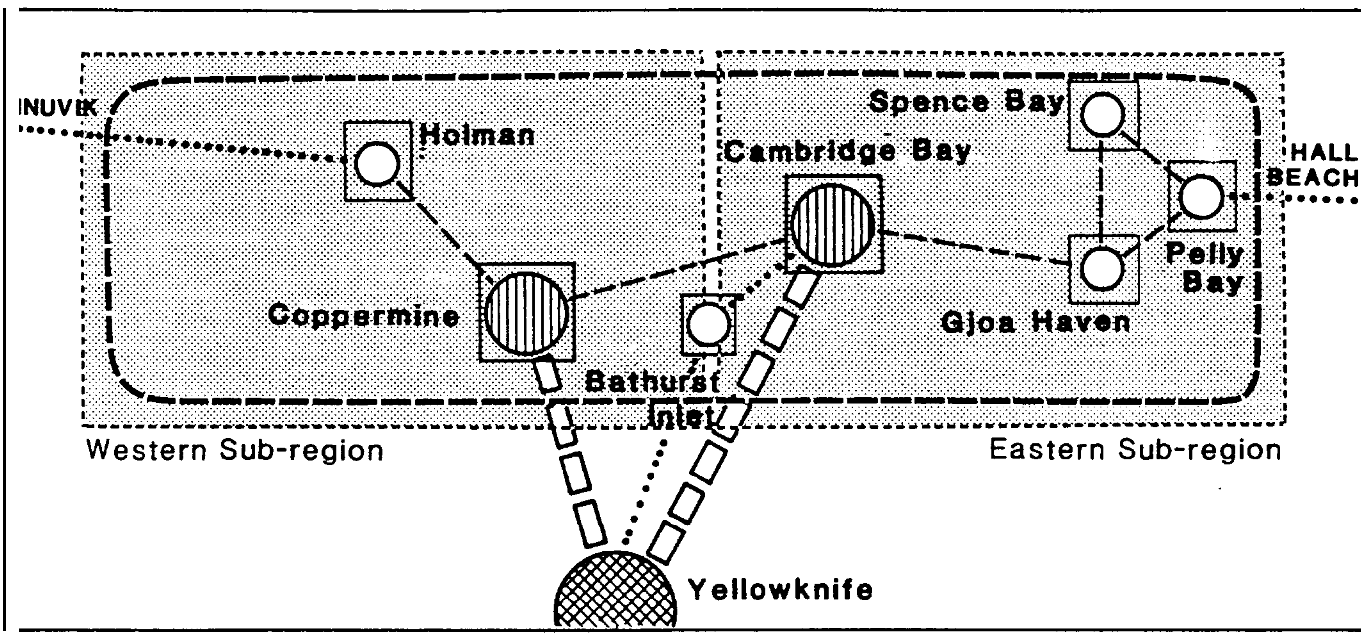
Primary - Cambridge Bay - Coppermine
Secondary - Holman, Gjoa Haven, Spence Bay, Pelly Bay, Bathurst Inlet

Staging Area

Primary - Cambridge Bay - Coppermine
Secondary - Holman, Gjoa Haven, Spence Bay, Pelly Bay
Tertiary - Bathurst Inlet/Bay Chimo



CONCEPT 1



CONCEPT 2

LEGEND

- Primary service, attraction staging area
- Secondary Development Areas

. Linkage

- Primary
- Secondary
- Tertiary

Figure 11.1

Optional Concepts

Linkages

Primary - Yellowknife - Cambridge Bay - Yellowknife Coppermine
Secondary - Coppermine, Holman
Cambridge Bay to Gjoa Haven, Spence Bay, Pelly Bay
Tertiary - Coppermine/Cambridge Bay to Bathurst Inlet - Hall Beach to Pelly Bay
Inuvik to Holman/Coppermine

11.5 EVALUATION OF CONCEPTS

Both concepts were presented and discussed with the steering committee and the opportunities and constraints of each concept were evaluated.

Concept 11 was the preferred concept for the following reasons.

Impact on Visitation

By promoting two primary destination areas, instead of one, there is greater opportunity to increase overall visitation to the region. In particular, travelers to Yellowknife have the possibilities of more than one flight route to the Arctic. This is important to the packaging of small groups on regular scheduled flights especially in the summer when there are fewer available seats.

By separating the region into two sub-regions it is easier to promote combined tourism packages and travel circuits with the two adjacent tourist regions (Western Arctic Region, Baffin Region). For instance it is possible to promote an Inuvik - Holman - Coppermine - Yellowknife corridor, through the Western Sub Region, which would be linked to the southern gateways of Edmonton or British Columbia. This also allows for the rubber tire trade (tour buses, Recreation Vehicles, Automobiles etc.) to gain access to the Arctic Coast.

The Eastern Sub-region can also be linked to the Baffin Region via Hall Beach providing access for the Toronto and Montreal markets.

In conclusion, then, the two sub-regions encourage increased access and consequently higher overall visitation. Two primary destinations and two sub-regions also imply greater diversity of the travel product and consequently more opportunity for shoulder season visitation. It would enable, for instance, Coppermine to expand its role from that of a service area for those summer visitors canoeing the Coppermine River. Cambridge Bay, as well, could become much more than a summer staging area for the lodges and communities in the Eastern sub-region.

- Impact on the Economy

Concept II would promote the primary level development of both Coppermine and Cambridge Bay. The formation of two development areas would have a greater impact on the economy of the region than the establishment of one major tourism staging and service area.

Two primary areas would:

- provide more job creation opportunities;
- increase the diversification of the economy in both Coppermine and Cambridge Bay;
- generate increased income for both communities; and
- provide additional job training opportunities.

- Impact on Tourism Development

Concept II would be more favorable to a balanced tourism development in the region. Because of the vastness of the Kitikmeot Region it is reasonable to divide it into two sub-regions that correspond to cultural differences, a social/political context, the resource base and the existing access corridors.

Concept Evaluation Matrix

FIGURE 11.2

	CONCEPT 1	CONCEPT 2
1. IMPACT ON STRATEGY		
- Extend Shoulder Season		●
- Increase Expenditure		●
- Increase Volume		0
- Access to Yellowknife		0
2. IMPACT ON ECONOMY		
Job Creation		●
Youth Employment		0
Diversify Economy		●
Generate Income		●
Generate Local Taxes		●
Job Training		●
3. IMPACT ON REGIONAL TOURISM		
- Responds to Available Facilities	0	0
- Impact on Competition		●
- Response to Markets		●
- Clustering Benefits	0	O
- Funding Potential		●
4. ENVIRONMENTAL IMPACTS	●	
5. COMMUNITY IMPACTS		
- Impact on Lifestyle	0	0
- Resident Recreation Opportunities		●
- Cultural Development		●
6. DEVELOPMENT POTENTIAL		
- Linkage to Adjacent Regions		●
- Local Investment Opportunities		●
- Infrastructure Costs to Communities		0

. = Greater comparative impact
O = Similar degree of impact

Two sub-regions may also be more responsible to the various specialty markets. For instance, those history buffs interested in the Franklin Expedition may only be concerned about visiting the Eastern sub-region.

There are certain competitive advantages of having two primary development areas. Not only does it potentially generate more promotion and development but in the case of Kitikmeot it also allows Coppermine and Cambridge Bay to collaborate with their respective adjacent tourism region (i.e. Western Arctic and Baffin).

Many regions have developed on the basis of one community providing the draw that can be created by the clustering of services and attractions in one community. However due to the structure of the Arctic Coast the same advantages can be more or less doubled by having two primary development areas within the same region.

Two focal areas for development also increase funding opportunities for the overall region.

11.6 DEVELOPMENT OPPORTUNITIES

The "Arctic Coast" theme and the Arctic Coastline's associated resource (communities, marine and wildlife, scenery, etc.), combine to suggest many development opportunities.

When matched with the existing and potential markets, a select list of workable recommendations for development emerge that:

- respond to the aims of a strategy; and
- maximize the available resources.

The most pertinent strategic aims that the proposed development opportunities will meet include:

- increasing overall visitation to the Arctic Coast region; increasing average tourist expenditure by offering more activities and experiences;

- appealing to specific or target markets;
- attracting more tourists in the shoulder season;
- providing a balanced level of development throughout the region;
  encouraging movement across the entire region by providing anchors at each end (e.g. Holman, Pelly Bay);
  appealing to visitors from adjacent tourism regions. , Western Arctic and Baffin;
- developing those attractions and services that are particularly appealing to the small, specialty package tours; and
  providing attractions that would gain national and international recognition for the Arctic Coast Region.
- developing those opportunities that compliment the resources and facilities of other regions in the N.W.T.

The resources that have been most frequently capitalized upon include.

  the pristine natural Arctic environment - particularly that which is relatively close to the communities;
- the existing services of the communities including accommodation, boat and three-wheelers, craftshops, schools, etc.;
- the Inuit Culture including its rich heritage of craft production, attitudes and beliefs, games and storytelling, etc.;
- the native knowledge of the north including its natural resources and ability to survive in the Arctic environment; and
- the impact of European culture starting with early exploration and the search for the Northwest Passage to the present day administration of the north.

The following list outlines potential development opportunities.

They will be fully expanded at both the community and regional level in the master plan and implementation strategy level.

Proposed Development Opportunities

1. Holman Destination Area

   a. Arts and Craft Studio/Workshop
   b. Inuit Cultural Museum and Northern Lifestyle or "Learner Center"
   c. Nature/Fishing Tours to Minto Inlet
   d. Thule Village Reconstruction
   e. Expanded Big Game Hunts

2. Coppermine Destination Area

   a. Coppermine Area Interpretive Exhibit
   b. Arctic Coastal Tours
   c. Coppermine River and Community Tours
   d. Excursions to Tree/Richardson Rivers
   e. Hudson's Bay Interpretive Exhibit and tours to Bernard Harbour
   f. Upgrading of Coppermine Inn plus Seasonal Accommodation

3. Cambridge Bay Destination Area

   a. Reopening of unused Char Lake Lodge
   b. Community-based fishing excursions
   c. Restoration of Stone Church and "Maud"
   d. Community Interpretive Displays and Tours
   e. Tours to Mount Pelly

4. Gjoa Haven Destination Area

   a. Northwest Passage Exhibit and tours on King William Island
   b. Amundsen Memorial and replica of the "Gjoa"
   c. Gradual acquisition of the Chantry Inlet Lodge
   d. Community tours and Entertainment

5. Spence Bay Destination Area

   a. Arts and Craft Studio and Workshop
   b. Boothia Peninsula Nature and Archaeological Tours
   c. Fishing and Hunting Trips
   d. Old Fort Ross and Thule Village Restoration
   e. Christmas Arctic Festival

6. Pelly Bay Destination Area

   a. Restoration of Stone Church and Museum
   b. Inuit Cultural Centre and Workshops
   c. Community Tours and Entertainment
   d. Inuit Cultural Center

7. Bathurst Inlet

   a. Bathurst Inlet Lodge Expansion
   b. Bathurst Inlet National Investigation

FIGURE 11.3 DEVELOPMENT OPPORTUNITIES

HOLMAN DESTINATION AREA

MARKETS	RESOURCES	ACTIVITIES	STRATEGY
1. INUIT CULTURAL AND NORTHERN LIFESTYLE OR "LEARNER CENTER"			
- Inuit culture enthusiasts - Community visitors - International - Government/business - Nothern educators	- existing building - artifact collection - community - authentic community structure	- demonstrations - A/V presentations - survival techniques - Arctic habitat study	- introduction of native culture and lifestyle - draw from Inuvik - western regional anchor
2. THULE VILLAGE RECONSTRUCTION			
- Inuit culture enthusiast - Archeological students - International	- existing archeological digs - several site locations - boat access	- guided tours - archeological and historical description	- attraction of national interest
3. NATURE/FISHING TOURS TO MINTO INLET			
- Outdoor enthusiasts - Naturalists - anglers - photography	- wildlife and char, trout - lodge facilities - vegetation - boats, three wheelers	- fishing - hiking/camping - photography - extended stay in lodge	- increase length of stay in area - expose unique features
4. ARTS AND CRAFT STUDIO/WORKSHOP			
- Inuit and Southern artists - shoppers	- production area - studio - homes of artists	- workshops - demonstrations - production of personne items	- expand Holmans existing arts/craft reputation
5. EXPAND BIG GAME HUNTS			
- international trophy - hunters - polar bear/muskox hunters	- polar bear - muskox - seal	- hunting - photography	- increase expenditure and volume

FIGURE 11.4 DEVELOPMENT OPPORTUNITIES — COPPERMINE DESTINATION AREA

MARKETS	RESOURCES	ACTIVITIES	STRATEGY
1. COPPERMINE AREA INTERPRETIVE EXHIBIT			
Arctic Coast Visitors Naturalists Local Residents	excellent site at mouth of Coppermine River views to River, cemetary	- static display - A/V presentations - guided tours	expose diversity of Arctic Coast history of Coppermine River, Hudson's Bay Company and Herne Expedition
2. ARCTIC COASTAL TOURS			
- All visitors - Canoeists	- Petershead boat coastline/islands	sightseeing - marine interpretation	increase length of stay - appeal to Yellowknife visitor
3. EXCURSIONS TO TREE/RICHARDSON RIVERS			
- Anglers - Naturalists - Wilderness enthusiast	- river systems - tour guides	- fishing - nature interpretation	Arctic river promotion
4. UPGRADE COPPERMINE INN AND SEASONAL ACCOMMODATION			
- All visitors	excellent site - competent management relatively higher visitation	accommodation - food services - local hospitality	- recognized affordable Arctic accommodation
5. COPPERMINE COMMUNITY AND RIVER TOURS			
- Canoeists - History enthusiasts - Upper income adults	- Coppermine River - Bloody Falls - Arctic Coastline sightseeing	- canoe river plus guided coastline tour, together with festivals	- increase length of stay - comprehensive package
6. HUDSON'S BAY COMPANY HISTORIC TOUR			
- History enthusiasts	- Bernard Harbour - Coppermine River	- nature interpretation	- increase length of stay special interest package

FIGURE 11.5 DEVELOPMENT OPPORTUNITIES

CAMBRIDGE BAY DESTINATION AREA

MARKETS	RESOURCES	ACTIVITIES	STRATEGY
1. STONE CHURCH MUSEUM			
- History enthusiasts - R.C. Missionaries - All visitors to area	- existing church - artifacts concerned citizens	exhibits and demonstration	- promote R.C. mission theme
3. RESTORATION OF MAUD			
- History enthusiasts - All visitors	- existing remains - excellent site - interest by Parks Canada	exhibition - static display	- promote early explorer themes
3. FISHING AND NATURE TOURS			
- Anglers - Government employee - Naturalists	- fishing lodges - lakes - Arctic environment - local fishing	- fishing - hiking - interpretation	- increase expenditure - increase length of stay
4. MOUNT PELLY TOURS			
- Sightseeing - Naturalists - All visitors	road to site avaiable three-wheelers - trails - interesting trip	- sightseeing - geology interpretation - picnicking - hand gliding wildlife interpretation	explore arctic environment - increase length of stay one day
5. COMMUNITY ADMINISTRATION TOURS			
- All visitors - Government employees - Arctic Students	- generators - windmill weather station - fish processing	- demonstration projects cultural interpretation	- understanding of Arctic conditions - increase stay and expenditure - four season appeal

FIGURE 11.6 DEVELOPMENT OPPORTUNITIES

GJOA HAVEN DESTINATION AREA

MARKETS	RESOURCES	ACTIVITIES	STRATEGY
1. CHANTRY INLET LODGE ACQUISITION			
- Anglers - Naturalists - Upper income families	existing lodge reputation excellent fishing dramatic landscape local Inuit Staff	- fishing - hiking nature guided tours	- train Inuit people - profit to community
2. NORTHWEST PASSAGE MUSEUM			
- History enthusiasts - All tourists - Europeans	Franklin Expedition Amundsen exploration expedition artifacts reconstructed Gjoa	- historic interpretation - exploration - magnetic pole interpretation tours of King William Island	- increase visitation , increase shoulder season - international awareness
3. COASTAL FRANKLIN EXPEDITION TOURS			
- History enthusiasts - Naturalists	- Franklin Expedition artifacts - boats	- exploration sightseeing	increase international awareness of Gjoa Haven augment interest in Franklin Expedition
4. COMMUNITY TOURS AND ENTERTAINMENT			
- All visitors	craft shop surrounding landscape - dog team storytellers	hiking - observation participation	increase awareness of native culture provide complete tour package (i.e. evenings)

FIGURE 11.7 DEVELOPMENT OPPORTUNITIES

SPENCE BAY DESTINATION AREA

MARKETS	RESOURCES	ACTIVITIES	STRATEGY
1. NATIVE CRAFT WORKSHOP			
- International artists - Government employees - Special students	- talented craftspeople - facilities - traditional/contemporary techniques	- doll making - parka design - dyeing	- off season opportunities - specialty markets - increase length of stay
2. OLD FORT ROSS RESTORATION AND TOURS			
History enthusiast Naturalists Photographers	former buildings striking scenery water access archeological site snow machines	- history interpretation - boat tours sightseeing - photography	extended stay in destination area
3. BOOTHIA PENINSULA TOUR			
- Naturalists - Photographers - Rockhounds	dramatic landscape water access archaeological sites marine life flora/fauna	- sightseeing - guided marine and land natural tours	extended stay in destination area - supplies at Spence Bay
4. FISHING/HUNTING TRIPS			
- Anglers - Sightseeing	excellent fishing water access lakes and coastal features	- fishing overnight camping - sightseeing	- extended stay in region - access through Spence Bay
5. CHRISTMAS ARCTIC FESTIVAL			
Upper income family National travelers Inuit cultural enthusiasts	traditional games and activities - community hospitality native homes community hall	- entertainment - participation in games cultural appreciation	- winter season tourism - use of community resources

FIGURE 11.8 DEVELOPMENT OPPORTUNITIES

PELLY BAY DESTINATION AREA

MARKETS	RESOURCES	ACTIVITIES	STRATEGY
1. RESTORATION OF STONE CHURCH			
- R.C. Missionary students - Inuit history enthusiasts - All visitors	- existing church - community interest	exhibits and demon-strations participation	identity and attraction for Pelly Bay
2. INUIT STONE HOUSE RESTORATION			
- All visitors - Inuit History enthusiasts - Archeological Students	- existing archaeological sites - boat access stone caches, etc	historic interpretation sightseeing photography guided tours	- extended stay in area unique attraction
3. COMMUNITY TOURS AND ENTERTAINMENT			
- Cutlural enthusiasts - All visitors	authentic/traditional lifestyle hospitality scenic surroundings craft shop	dialogue observation participation photography	extended stay in community activity for community artists
4. INUIT CULTURAL CENTER			
Students of Inuit culture Artists/archaeologists Specialty markets Government/business Northern indigenous peoples Northern educators	- authentic lifestyle - interest in cultural preservation - hospitality - scenic beauty archaeological features elders	- cultural values/beliefs - survival techniques - Arts/craft/games - language - habitat study - indigenous knowledge	- major international attraction for north encourage flow from eastern and western markets - eastern anchor for region

FIGURE 11.9 DEVELOPMENT OPPORTUNITIES

MARKETS	RESOURCES	ACTIVITIES	STRATEGY
1. BATHURST INLET LODGE EXPANSION			
- Outdoor enthusiasts - Sightseers/photographers - Naturalists - Anglers - Photographers - International tours - Special Arctic tours	Bathurst Inlet - Burnside River Welberforce Falls outpost camps quality accommodation established interna- tional reputation access to Bay Chimo	Arctic nature study photography hiking flightseeing backpacking canoeing cultural inter- pretation in Bay Chimo	gain additional interna- tional recognization increase volume and expenditure encourage repeat visita- tion promote Arctic environ- ment preservation
2. BATHURST INLET NATIONAL DESIGNATION INVESTIGATION			
- Outdoor enthusiasts - Environmentalists - International tours - Arctic environment specialists	- Bathurst Inlet Lodge marine life - Wilberforce Falls wildlife/vegetation	camping/canoeing hiking backpacking nature interpretation	gain national and inter- national recognition for the Arctic Coast - increase destination draw national publicity

ANNEXA

SUMMARY OF INTERVIEWS WITH CANADIAN AND PROVINCIAL TOURISM OFFICIALS AND PRIVATE SECTOR REPRESENTATIVES

1.0 INTERVIEWS WITH CANADIAN AND PROVINCIAL OFFICIALS

Information on market trends obtained from the provincial contacts is not all applicable to trends in the Central Arctic. British Columbia, Alberta, Saskatchewan, Manitoba, and Ontario visitors are primarily hunters and sports fishermen, a market that differs from the wilderness enthusiasts and cultural observers that constitute the Arctic Coast market. British Columbia, Alberta, Ontario, and the Yukon draw most of their visitors from the rubber tire traffic, a market not available to the Arctic Coast. To compare experiences among provinces we focus on comparing experiences of visitors entering by plane who are not interested in consumptive activities. Alaska, Manitoba, and Saskatchewan draw heavily from the plane market, and Alaska and the Yukon offer products similar to the Arctic Coast, e.g., scenery, wilderness adventures and native culture.

Demographics

According to interviews with government officials, visitors to Alaska and the Yukon have the following general characteristics:

- a university education;
- household income of $30,1300 or more;
- an age range of 25-50 years.

Comments on Markets

Interviewees noted that tours are an important segment of the market. Tours tend to be for special interest groups, and, if the groups are satisfied by the experience, repeat vists are possible.

Most of the **North American visitors to Alaska tend to be along north-south lines (as opposed to east-west lines).** A major promotion campaign in Alaska, however, has attracted visitors from other major population areas such as Florida and New **York.**

The European market has been approached, but constitutes a very small portion of total visitors. The West German market appears to be an important source for visitors when considering promotion to Europe.

Northern areas (especially Alaska) have an image problem that restricts their appeal to tourists. Many people believe it is cold year round in the north. There is a lack of understanding of the level of accommodation available, and a concern about how to travel around. These information deficiencies or inaccuracies are likely applicable to the Central Arctic.

There is strong competition for tourist dollars from dissimilar areas and products. The high cost of plane transportation raises the cost of an NWT holiday beyond the reach of many potential visitors.

Promotion

Interviewees suggested that a northern tourism product should be unique so as to compete efficiently in the world market, and allow concentration of promotion efforts on high potential market segments.

Lack of accommodation facilities in the Arctic Coast reduces the incentive to promote on a large scale. Promotion, however, is a very important factor because of the general lack of information available and the level of knowledge of the NWT's products. The role of the province or state appears to be to make potential visitors aware of the products, climate, and general services available.

Business Skills

Interviewees expressed concern over the low level of business sophistication used by most local operators. This factor will become more significant as the level of competition rises and as more emphasis is placed on marketing, pricing, and quality. There is a need for:

a) basic business skill training at the local level;
b) standards for outfitters covering quality, consistency and general operations; and
c) standards for guides covering quality, consistency and general operations.

2.0 INTERVIEWS WITH PRIVATE SECTOR OPERATORS

There is a formal structure to the tourism industry. The main participant roles are:

a) on site
   - guide and outfitter
     accommodation (and food) vendor
   - souvenir shop
   - Inuit residents - commercial hunters and fishermen
                     - art producers: carvers/painters

b) package organizer/wholesaler
   - on site or off site but with strong local connections

c) air line
   - scheduled
   - charter
     (may also be wholesaler)

d) tour wholesaler
     in major market “(normally major Canadian population centre)

e) travel agent
   - retailer located in target market areas or specializing in promotions to specific interest groups.

The following standard definitions are helpful to keep in mind:

- wholesaler:
  - specializes in planning and operating prepaid, preplanned vacations .
  - generally these tours are sold through agents
- travel agent:
  - makes travel arrangements for clients on a commission basis
  - provides the liaison between client and wholesaler
  - is major promoter to general public
  - is selective in the products (tour packages) he sells and may specialize in a specific type of tour.

Interviewees indicated that a variety of operators **exist from wholesalers who do not use agents (deal with a captive market** or sell enough on their own) to wholesalers who are also outfitters with local contacts and a degree of local participation. The overwhelming comment was that there is a serious lack of parties in role (b). This comment relates to the NWT, not simply the Arctic Coast.

Interviewees reported there is a need for an intermediary between southern (Canadian) wholesalers (who know how to promote a product and who understand the marketplace) and local outfitters (who have a low understanding of tourists' needs and business promotion). A successful intermediary would have a good knowledge of the North; an actual presence in communities would be particularly appropriate. The intermediary must be capable of putting together saleable packages and promoting them to wholesalers, and coordinating the efforts of the local parties so that tours move smoothly and a quality image is presented. (Note: Wholesalers often do not have time to put together all the local details, but they are reluctant to adopt and promote a local product unless it meets their standards for reliability and **quality.)**

Products

Although the hunting and sport fishing markets are well defined, well established, and lucrative, they are consumptive by nature and their activities usually take place away from local communities. This is not in accord with the community-based tourism concept. Hunting and fishing are offered by some of the operators contacted, but most focus on the “wilderness experience” tour. Wilderness experiences are non-consumptive (although they may include a short fishing trip) and may focus around activites a short distance from community. The emphasis is on using local services which helps keep tourist dollars in local hands. Note: Many of the operators contacted organize a very small number of tours to the NWT each year (e.g., 3-5) and can apparently make a profit on this low volume of business.

According to operators, the appeals of the Arctic are:

- wildlife - muskox, caribou, seals, whales, polar bear
- scenery - tundra, glaciers, flowers, ocean
- culture - Inuit lifestyle, commercial fishermen, carvers, igloos, dog sledding.

Wildlife and scenery are the obvious components of the Northern product appeal. Several operators feel that the real draw of the north is the mystery and remoteness of a virgin, unexplored (undeveloped) land. The history of expeditions and a desire to recreate these experiences add to the appeal. Several operators were quick to point out, however, that it is the” friendiness of the Inuit and his unique culture that is most impressive to visitors. Certainly the market these products appeal to is very different from the hunting and fishing market, and requires a different approach.

Market

The Canadian level of interest in visiting the north has been low to date. The only success in addressing the Canadian population has been a one day curiosity tour. It is inexpensive, $200-300, and involves scheduled flights. It allows participants to visit a town above the Arctic Circle, view the northern lights or the midnight sun, and get a brief exposure to Arctic culture. The tour appeals mainly to 55(+) retirees who are also significant sightseeing bus tour buyers. This group tends to require more creature comforts than most northern towns provide.

Visitors participating in a wilderness experience have the following general characterisitcs:

- they are aged 35-45;
- they are conservationists or naturalists
- they have a university education
- they are professionals
- they earn $30,000 or more per year.

Each contact indicated he had his own market which he pursued. Some concentrate on special interest groups (e.g., whale or bird watchers), others focus on geographic regions such as Japan, southern American states, or Europe.

Packaging

Tour packages vary widely. Although some operators offer packages starting in a specific NWT town, most wholesalers felt an all inclusive, 'escorted tour that starts and ends at a major airport is the easiest to sell. It is also the easiest system under which to control the qualilty of the visitor's experience. (All inclusive means that air fare, meals, accommodation, supplies, guides, and planned activities are included in the package price.)

Trips vary in length from the 24 hour "circler" to a 2 week major wilderness trek. The planned activities dictate the trip length, but the following was suggested:

> "For European travelers a 10-day to 2-week range is best. Longer creates problems of maintaining a high level of interest. Shorter creates problems of selling an expensive vacation holiday (is the price worthwhile on a short trip when other vacation alternatives are considered.)"

Experience indicates that 7-day trips are common, and may involve 3 days in 2 communities.

Party size is generally 5-14, but 10 is a common and apparently economic number. Problems of accommodation and transportation occur with numbers larger than 20. (Small charter planes don't have much extra space once the supplies and 10 passengers are on board).

Food is an important element of these tours. If the tour involves camping, the accommodation may be cramped, but if the food is good there is still a sense of quality. Some operators are very careful to cater to the tour groups needs and to maximize their enjoyment. For example, one operator indicated that when dealing with Europeans (West Germans specifically) it is important to make sure they carry a large stock of quality liquor.

Promotion

Most operations concentrate their promotional efforts through:

a) specialized magazines
b) specialized agents
c) inviting travel writers working for major magazines
d) attending all major marketing shows (trade)
e) 4-colour brochures

As mentioned earlier, promotion by operators must address both the consumer market and the trade if wholesalers are going to buy and promote the package.

Ideas for New Products (No consideration of whether economically feasible)

1. A 24 hour circular type of trip from Yellowknife to Coppermine or some other Central Arctic town. Offer a coordinated approach which tour (bus) companies and the general tourist can buy. Provide air fare, escort, a lunch, opportunity to buy a souvenir.

2. Package a cultural and wilderness experience oriented tour, e.g., demonstrate: Inuit cooking
   seal skin tanning
   - perform cultural dances or events
   - visit art carvers at work
   - visit historical areas along with a well prepared show
   - visit Tundra and explain the unique flowers and short growing cycle
   - outline the aspects of Inuit life that are different that those experienced in southern regions.

Miscellaneous

a) Problems:
High air fares limit the market appeal. For some packages, air fares represent 70% of the cost. The cost of food and accommodation in many of the towns is also high, and the quality of service is not worthy of the price.

Outfitters are not sophisticated businessmen. They don’t have sufficient money and expertise to conduct extensive promotion and they don’t understand the need to promote their service to travel agents.

They are not well organized and are generally not capable of putting together colour brochures, family trips or slick packages. They lack an understanding of how to appeal to the tourist and are not oriented to sales. Most also don't comprehend the value of promotion and the need for wholesalers or agents. High priced vacations draw sophisticate U.S. and European visitors who are also more critical of the product offered. It is therefore, important to develop a professional approach at the outfitter level which will ensure reliability and an understanding of how to treat visitors (e.g., don't shoot caribou in front of group bird-watchers.)

b) Remarks:

Vancouver agents do not seem to sell NWT holidays. This is partly because Canadians have not shown much interest in these trips. Although the sample was small, Evergreen Tours said that few, if any, agents in Vancouver were active in the NWT market.

ARCTIC COAST TOURISM CONTACTS

Telephone Interviews

Organization	Contact	Lot/Phone	Quest.	Market Role
Tourism Canada	Frank Stock	Ottawa 613 995-8426	A	Some overseas P.R.
BC Tourism	David Henderson	Vancouver Rob . Sq .	B	Promotes to Trade Trade not Commuter
Alberta Tourism	Richard Bamfield	Edmonton 403-427-4336	B	
Sask. Tourism	Lawrence Gilmuor	Regina 306-565-2187	B	Sponsors/Coordinates some shows in major non-domestic markets
Manitoba Tourism	Bob Bridge	Winnipeg 204-945-4204	B	
Ontario Tourism	Karen McMillan	Toronto 416-965-5764	B	
Yukon Tourism	Goerge Singfield	Whitehorse 403-667-5340	B	
Alaska Tourism	Don Dickui	Juno 907-465-2010	B	Major national adv. campaign
Evergreen Tours	George Shaw Jr.	Vancouver 604-687-5690	C	Wholesaler/ retailer
Tuullik Wilderness	Bruce Rigby	Ottawa 613-234-5267	C	Wholesaler/ Outfitter
High Arctic International Explorer Services Ltd.	Bezal Jesudason	Resolute 819-252-3875	C	Wholesaler
Qaivvik Limited	May Orr "	Yellowknife 403-873-2074	C	Wholesaler
Goliger's Tours Ltd.	Dan Goliger	Toronto 416-926-0877	C	Wholesaler
Special Odysseys	Skip Voorhees	Medina, Wash. 206-455-1960	C	Wholesaler
Peyton Enterprises	John Faber	Brantford 519-759-0880	C	Wholesaler/Lodge Operator

Organization	Contact	Lot/Phone	Quest.	Market Role
Canadian North Outfitters Inc.	Mr. Knapp	Toronot 416-689-7925	C	Wholesaler/ Retailer
De West Tours Ltd.	Veronica Thebault	Vancouver 604-684-5155	C	Wholesaler
Kitikmeot Arctic Tours	Syd Glawson	Cambridge Bay 403-983-2206	F	Outfitter/ wholesaler
Kingalik Tours	Bill Goose	Holman 403-396-4411	F	Outfitter
P.Lawson Travel	______	Vancouver 604-682-4555	E	Agent
Sears Travel	______	Vancouver 604-689-8215	E	Agent
Hagen's Travel	______	Vancouver 604-263-0944	E	Agent
Pacific West Air	Maureen Griffin	Calgary 403-235-8100	D	Airline/ wholesaler
Nordair	Tina Difruscia	Montreal 514-340-8141	D	Airline/ wholesaler
Northwest Territories Airways	Gary Plexman	Yellowknife 403-920-2500	D	Airline

QUESTIONS USED

Questions for - *A* -

1. Which markets are expected to be important for the central ***Arctic*** and north as well?

2. Which products will appeal to these markets?

3. Does Tourism Canada have any marketing plans that are relevant to our work **in** NWT?

4. Aware of any changes or developments **that could** be important to the development of Kitikmeot Tourism?

5. Do you have any relevant market information on tourism trends as they pertain to northern Canada and to wilderness experiences.

6. Can you suggest other **contacts.**

Questions for - B -

Provincial Government Contacts

1. Is tourism a significant contributor to the northern provincial economy?

   If no - What are the main hurdles restricting tourism development?

2. What has been the primary approach used to stimulate tourism development?

3. What are the main reasons for tourists visiting the area

   a) visiting friends/relatives
   b) passing through on way to another destination
   c) business/pleasure
   d) site-seeing in wilderness
   e) hunting and fishing
   f) other

   When is the main season (summer, fall, winter, spring)?

4. What are the primary tourism products being offered?

5. How do most tourist arrive - car
   - train
   - plane?

   If plane is significant . . . is transportation cost a deterrent or a market restriction

   ... who are the major air carriers

Questions for - C -

6. Is there much group (or package tour) tourism occurring or are the visitors mostly individuals, families or/independent parties?

   If group tours are significant:
   a) does it tend to be remote lodge based or community based experiences?
   b) is accommodation or food quality a problem?

7. Where are the primary markets from which you draw tourists?
   What type of theme are you promoting for the north?

8. Describe the characteristics of typical northern tourist in terms of:
   - sex
   - age
   - income
   - occupation
   - special interest

9. Is there much repeat visitation?

10. Are you aware of any changes on the horizon that could be important for northern tourism.

11. Do you have any printed material that might be helpful to us, e.g., General Tourism trends (especially in north).

12. Can you suggest any industry or association contacts that we should talk to.

Questions for - D -

Tour Wholesalers

1. Do you offer tours to NWT?

   Which areas - **Kitikmeot?**

2. How many people do you take up/year?

   How many tours/year?

   What packages do you offer?

   - price
   - length
   - activity *
   - time of year *
   - location
   - who buys *

3. To date Kitikmeot has hunting, fishing and nature observation camps based in remote lodge locations. The present concept is to develop a community based tourism that uses services already in existance within the community and builds tour packages around activities that are easily accessible from the community

   E.g., - cultural observation/learning activities
   historical tours - tent rings, Franklin Expedition.
   wilderness huts.
   fishing for Arctic char
   wildlife observation - birds
   - caribou
   - **muskox**

   - dog sled trips

4. Which markets appear to offer good potential for the Central Arctic?

   Geographically

   Special interest

   INC level

   Occupations

   Age/Sex

   Life style

5. What kind of tourism products are required to attract visitors?

6. What type of tour packages or promotions are needed to increase tourism in NWT?

7. What are the main problems in attracting tourists to the North?

(8. What are competing destinations offering/doing.)

9. Are there any trends in tourist interests, spending or travel patterns or any general changes which will likely effect Northern tourism?

Questions for - D -

Airlines

Currently Service m - Where fly to + from.
- scheduled flights
- charters

W.R.T. Tourists - Have you been involved with any tour packages for the NWT?

How are most operating
- price includes air fare
- price is based on after arrival costs

What are some of problems attracting tourists
- high cost of air fare (a factor?)

Who and where is the best market for tourism packages in Central Arctic?
- Where
- INC
- interests

How can package/promote products to this group.