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Baffin Regional Tourism Planning Project - Regional Strategy Report
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BAFFIN REGION

TOURISM STRATEGY

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1.0 INTRODUCTION

1.1 Background to the Study

The tourism industry of the Baffin Region is at a very early stage of development relative to other regions of the Northwest Territories and Canada. Although the Region's tourism resource base is of high quality with unique characteristics that have an inherent potential to attract a diversity of markets, the tourism industry at present suffers from a number of deficiencies that weakens the Baffin Region's ability to compete for those markets.

These deficiencies, including the limited number and poor quality of eating and sleeping facilities, the ad hoc development of few attractions, the low participation rates of native northerners, an insufficient awareness of the requirements and expectations of a variety of tourists, the low level of the requisite management and technical skills, limited financial resources and, inadequately co-ordinated policies, incentive programs and support mechanisms, create a complex planning and development problem necessitating the implementation of a comprehensive, co-ordinated tourism development strategy capable of guiding the future actions of both the public and private sectors.

As an initial step in the development and implementation of a tourism development strategy, the Government of the Northwest Territories, through its Department of Economic Development and Tourism, commissioned the Baffin Regional Tourism Planning Project. The intent of the project is to provide a basic strategy for resource development and marketing and serve as an educational tool to stimulate interest and gain the full participation of native residents in the tourism industry.

1.2 Objectives of the Study

As outlined in the Terms of Reference and subsequently modified and elaborated during discussions with officials from the G. N .W. T. Department of Economic Development and Tourism, the basic purpose of this study is to:

> "define a strategy, a course of action for the '80s that will guide tourism development throughout the Baffin Region by identifying investment opportunities for the private and public sectors that will allow for maximum contribution to the economic well -being of individual areas with in pre-determined social carrying capacities".

Within the context of this basic purpose, the specific objectives of the study are:

1. To develop a study/planning process that will permit and encourage the involvement of community residents in data gathering and analysis, in strategy formulation and in plan preparation.

2. To increase the awareness of residents of the possible benefits to be derived from tourism and the type of demands that tourists may place upon the community through discussions and presentations.

3. To identify and examine the tourism and recreational resources of the Baffin Region in general, and each of its communities in detail, and to describe the general and specific opportunities and constraints to the development and growth of the tourism industry in the Baffin Region.

4. To identify and describe the market potential of the identified tourism and recreation resources.

5. Within the context of market potentials, to isolate and describe specific, realistic tourism development/investment opportunities within each community and throughout the Baffin Region.

6. To outline the general economic feasibility of various types of development.

7. To develop/recommend specific policies, guidelines, programs and public/private sector actions required to realize the development/investment opportunities.

8. To prepare a five-year tourism development plan for each community which organizes and priorizes the development/investment opportunities and associated programs or public/private sector activities.

9. To prepare a ten-year general tourism development strategy for the Baffin Region which integrates and provides a context for the implementation of the individual community tourism development plans.

10. To provide a synthesis of supporting and background information to support ongoing planning activities.

2.0 MARKETS AND MARKET ANALYSIS

2.1 Approach to Market Analysis

Because the Government of the Northwest Territories was ' involved in a major market study for the entire Territories, it was agreed that a large majority of the market analysis would rely on review and analysis of previous work (secondary sources).

The agreed to methodology would be comprised of:

i) Review and analyze available background market reports, see Section 2.2

ii) Contact involved/interested government agencies to determine availability of pertinent visitor data.

iii) Contact involved/interested private sector agencies to determine availability of pertinent visitor data.

iv) Interview selected private sector tour operators/wholesalers and special interest groups to review their interest in visiting proposed tourism concepts in the Baffin Region.

v) Development of market projections for specific tourism developments.

Closely associated with the market analysis was the economic and financial analysis of selected developments (see Section 4.0). It was agreed with the G. N. W. T. that the approach was to provide "a market analysis". "Marketing" for the recommended projects i.e., how to interest and attract visitors, while important, was a secondary component of this study.

2.2 Data Availability and Characteristics

Generally, studies pertaining to travel in the north provide a disjointed picture because of the breadth of land ranging from the Eastern Arctic/Baffin Island to the Western portion of the Northwest Territories, the Yukon and Alaska. Most of the background studies focus either on both the Yukon and the Northwest Territories or at best, the Northwest Territories alone. Very few deal with travel and tourism specifically in the Eastern Arctic. Many of the reports caution against conclusive statements because of weaknesses in the survey design, small sample size, or collection of data. The background studies examined included the following.

1. The Travel Industry in the Northwest Territories, 1975 Department of Economic Development, Division of Tourism, G.N.W.T.

2. Tourism Development and Marketing Strategies for the Northwest Territories, Intrec Group Ltd., Outcrop Ltd., Qaivvik Ltd, May, 1980.

3. Northwest Territories Tourism Plan, K.W. Lawrence, Department of Tourism, G.N.W.T.

4. Survey of Sport Fishing Lodges in the Northwest Territories, Department of Fisheries and Oceans, Western Region, 1981.

5. Pangnirtung Tourism Study 1981, Marshall Macklin Monaghan.

6. Northwest Territories Travel Surveys 1981-1982, Deloitte Haskins & Sells Associates

7. Northwest Territories Economic Development and Tourism - Five Year Marketing Strategy, January, 1982.

8. **Yukon Tourism Industry Highlights**, 1981, Yukon Department of Tourism and Economic Development.

9. Yukon Coupon Conversion Study, 1981, B.C. Research.

10. Vacation Travel by Canadians, 1980-1981, Traveldata International.

11. Travel, Tourism and Outdoor Recreation, Statistics Canada, **1978-1979.**

Many of the studies appear to have conflicting data about origin of visitors to the Territories, use of travel agents etc. In many cases, distinctions have to be made in interpreting northern tourism data to the Baffin Region circumstance. Its unique topography, cultural and historic base as well as the use made of accessibility (air) make applying overall northern tourism data to Baffin unrealistic.

Summaries of the background data are presented in Appendices I, II and III.

2.3 Overall Tourism Trends

Based on a careful assessment of the background data and discussions with tour wholesalers, the following are the consultants conclusions about the potential tourism market for Baffin Region within the context of data inadequacies.

- **People's desire and possible need to take vacation holidays seem to be recession proof. (Some 55% of Canadians took a vacation holiday in 1981). What does happen is that the holidays tend to be more national rather than international when the economy is depressed.**

  The main reason for travel historically has been to visit relatives and friends (48% of vacationers noted it as the main reason for travel in 1981). Because of the sparse

population in the Northwest Territories and Baffin Region in particular, and the cultural differences between the residents and the rest of North America and Europe, this reason for visiting Baffin Region is largely irrelevant.

. In the north of Canada, Northwest Territories and the Yukon, the origin of visitors to a particular area can vary signficantly even between northern locations that are relatively close together. Of the estimated 7,000 - 7,700 visitors per year in 1981 to the Baffin Region (including non -resident business travel lers - see Appendix I I for background), it is estimated that their origin is:

Ontario	25%
Quebec	10%
Atlantic Canada	Insignificant
Western Canada	10%
Northwest Territories	15%
Sub-total Canada	60%
U.S.A.	25%
Europe	10%
Other	5%
	100%

. It is felt from various sources that Canadian visitors, with the exception of Quebec residents, are becoming more interested in visiting other regions within Canada including the Northwest Territories.

The time of year of visitation is largely skewed towards the summer months. The estimated proportion of visitors in each of the four quarters is such:

First Quarter	7.5%
Second Quarter	30. 0%
Third Quarter	45. 0%
Fourth Quarter	17 .5%

- While a profile for Baffin Region visitors could not be done, the experience of the Pangnirtung Community Tourism Study, the Northwest" Territories Travel Surveys and the Yukon Tourism Industry Highlights, indicate that the Baffin Region visitors, on average, have above average incomes, are most [i kely to stay in a hotel, motel or lodge, although camping is popular. Popular activities are photography, sightseeing, shopping for handicrafts, backpacking/hi king, visiting historic sites/museums and hunting/fishing, and are most likely to be adults under the age of 40.

2.4 Future Market Prospects - Market Segments

Given the changing demographics (the proportion of those 20-39 years of age in Canada's population will decrease from 34.3% in 1982 to 33.4% by 1999, the absolute number of people in that age range will increase by 7.6% to just over 9 mi I lion people in 1992), increased reliance in Canada on domestic tourism, it is suggested that the market areas which promotional campaigns should firstly be directed to are within Canada, specifically Ontario, Alberta and British Columbia. Not only do these areas represent significant popu lation bases, they have traditional ly shown the greatest interest in visiting the Territories. In the case of Alberta and British Columbia, most of this interest has been directed towards the Western Arctic and the Yukon because of easier accessibility. It is felt that with proper tourism facilities some of this interest can be re-directed to the Baffin Region.

The U.S. tourism market for Canada is decreasing in absolute number and as a relative percentage of the total tourism market in Canada. However, it still represents a significant market in terms of affluence and numbers. It is felt that the areas to concentrate promotional campaigns would be initially the mid Atlantic States (New York, New Jersey and Pennsylvania) and then the East North Central States (Wisconsin, Ohio, 11 linois, Michigan and Indiana).

These two areas have traditionally represented over 50% (25% each) of the total U.S. travel trade to Canada. Deloitte Haskins & Sells estimated that 1 1% of all visitors to the Northwest Territories come from the Eastern U.S. Even more significant, the East North Central States is the second largest U.S. market segment visiting the Yukon after the Pacific Region. There is no geographic reason why some of this interest cannot be re-directed to the Baffin Region.

Overseas tourism to Canada has been increasing rather rapidly. The four leading countries of origin are the United Kingdom, Germany, Japan and France. Based on the Yukon's experience, the Northwest Territories Travel Survey report and the Pangnirtung Study, before any widespread promotional campaign is directed to the international market it should be directed to one selected country (Germany or the United Kingdom would be the first choice) to determine the effectiveness and response.

There are two other important factors to be considered about overseas visitors to Canada. Toronto is the Inbound Canadian City of 57% of al l overseas charter passengers. Also the majority of overseas travel lers to Canada enter via the United States - 53. 3% in 1979 with 35.4% coming by land.

The implications from these facts is that Toronto is an obvious point of interest for overseas visitors. Arrangements/tours etc. for overseas visitors should al low for the fact that Toronto is the most popular point of entry. Because of the strong relationship of overseas tourism to Canada with U.S. visitations, innovative tours involving both U.S. tourism points and the Northwest Territories would be worth exploring.

The segment of the visitors market most li kely to be attracted to the Baffin Region are the "off-the-beaten trail" type. This market segment has been estimated to be 38% of the total Canadian vacation market. This segment has a strong preference for out of the way places, tends to avoid first class accommodation, outdoor recreational activity is important and this group is relatively loyal to Canada. Length of stay is likely to average 2-3 weeks. Promotional campaigns should be directed towards this market segment in the geographic areas selected.

As noted in the publication 'Vacation Travel by Canadians', there is strong interest by Canadians in visiting the Northwest Territories and the Yukon. While cost consideration may be a factor, it is felt that poor accessibility and inadequate facilities are largely to blame for people's reluctance to visit these areas. Promotional campaigns and tourism developent must be directed to overcoming these shortfalls.

The package tour market while not exhibiting much overall growth, is a significant factor in trips to the Northwest Territories and the Yukon. It is felt that this method of travel will continue to grow in importance for these areas. Travel agents are very much involved in promoting package tours (60% of package tour users availed themselves of the services of a travel agent). Obviously therefore, the travel agents must be made aware of the facilities available and tour wholesalers need to become involved early in the planning and promotion of package tours. The vast majority of package tours (93%) do not involve children. The primary market segment is the 20-40 year old childless adult.

There are also markets for two specialized market segments, 1) the hunter/fisherman (over 40 years of age, middle to upper income and solely interested in hunting/fishing) and 2) the middle-age sightseer (upper income, over the age of 40 who is interested in viewing the Arctic but still expects a degree of comfort). Both of these market segments are likely to average between 5 to 7 days per visit.

2.5 Development Implications; Reqional, Community

Based upon the background information collected and discussions with wholesalers and tour operators, a number of conclusions can be drawn from the market data that have direct implications for the development and operation of tourist attractions and developments throughout the Baffin Region.

To illustrate their direct relationships with possible tourism developments, the conclusions and implications are presented below in terms of association with example developments.

Lake Harbour Interpretive Boat Tour

	“Broad appeal in each of these areas
Geographic Markets	. Ontario, Alberta, British Columbia.
	Eastern United States primarily New York, Pennsylvannia and New Jersey, but also northeast central States like Michigan and I llinois.
	. United Kingdom (because of English language).
Specialty Markets (not necessarily geographically centred)	Universities (both faculty tours and student tours).
	Nature groups, photography clubs, etc.
Accommodation/ Faci l ities	Cabin cruiser/long liner should be comfortable but not l uxu rious.
	. Lake Harbour accommodation hotel should be basic but clean and offer a smal l selection (2 choices) of wel l - cooked but simple meals.
	Tent camps on the tour should be as spacious as possible; food should emphasize some local foods, char, etc.
Tour Activities	Tour guide(s) must be able to speak English and relate wel l to visitors.
	. -Sense of participation in sightseeing, the Inuit summer camps and char fishing wil l need to be insti l led in the visitors by the tour guide(s).

Marketina	. Work with established tour wholesaler and travel agent to package and sell the tour.
	. May be advised to use this tour or tour similar as a pilot project in establishing good working relationships with travel industry, to test the reaction of the market to the Baffin Region, and to iron out any operational difficulties in the administration of the tours.
	Must be packaged as an all-inclusive tour including air fare from a stated destination (Toronto), tour activities, accommodation, and meals.
	Colourful, clear brochure with complete information presented as simply as possible.

Fish Camps

Broughton Island, Arctic Bay, Nottingham Island.

Geographic Specialty Markets	. Particular market segment of middle-upper income males in Ontario/Eastern United States (New York, Pennsylvania, New Jersey, Illinois, Michigan) and possible Germany.
Accommodation/ Facilities	Accommodation must match and compete with other fish camps currently established.
	Plywood tents with central mess.
	Food should emphasize catch of the day and be simply prepared.
	Standard fishing boat, outboard motor will be adequate.
Tour Activities	Tour guides must be knowledgeable about where the fish are as the catch is all-important.
	While ability to speak English fluently is not essential, tour guides must be willing to be adaptable to fishermen's whims about when and where to fish.
	Potential market to sell "specialized" Arctic fishing equipment, lures, bait, line, etc. to fishermen.

Marketing

. Could be packaged through tour wholesaler/travel agent (all-inclusive price including airfare) or could be individually marketed through advertisements in fishing magazines (Field and Stream) or in major Ontario and Eastern U.S. Dailies such as the Toronto Globe and Mail, New York Times, Wall Street Journal, Detroit Free Press, Chicago Daily News, or at sporting shows. (All-inclusive price for land portion, individual arrangements for airfare).

Arranging for write-up in a weekend magazine supplement would also be advantageous.

. Recommended that one camp be instituted first as a pilot project to determine market demand and to provide operational guidelines for the other camps. The camps, when they are all established, could be market together.

Lake Harbour to Frobisher Bay Snowmobile Tour

Potential Markets/ Marketing

While this tour could be marketed on its own to a broad range of potential tourists in Canada, the U.S. and overseas, its length etc. suggest that it be marketed to tourists/business travellers who are already planning to come to the Baffin Region, e.g. , fish camp/ Frobisher Bay boat tour users.

. Specialty markets would include photography clubs, nature clubs, snowmobile clubs .

Suggest that this tour not be implemented initial ly until success of other attractions is realized.

Accommodation/Tour

. Frobisher Bay/Lake Harbour facilities need to be simple but clean.

. Food should be simply prepared.

. Guides must be able to speak English and be knowledgeable about the area to properly conduct the tours.

Frobisher Bay Inuit Art Trip

Geographic/Specialty Market	. Because Canada Art including Inuit Art has a limited market (really confined to Canada and some U.S. collectors) this market segment is rather, small but well defined. Primary markets would be Ontario, Alberta and British Columbia. Secondary market would be the Eastern U.S.
Accommodation	. Rental accommodation in Frobisher Bay must be clean. Food must offer a range of menu for differing tastes.
Tour	. Guides must be knowledgeable about Inuit Art and be fluent in English. Must be able to liaison with the Art Co-operatives and speak about the attributes of the various artists.
Marketing	Tour could be marketed directly as an all-inclusive package through various Art Galleries, Associations, etc. in the various geographic markets. Individual day trips from Frobisher Bay could also be sold to visitors (tourists/business travelers) already in Frobisher Bay/ Baffin Region. Because of the somewhat depressed market for collectibles and Art of all types due to the recession, the timing of major emphasis on this tour might better be postponed, although individual day trips from Frobisher Bay could be marketed.

Frobisher Bay Toonik Tyme Tour

Geographic Markets	. Ontario, Alberta and British Columbia Eastern U.S., Mid Atlantic and North-east Central States. . United Kingdom/Germany.
Accommodation	Rental accommodation in Frobisher Bay should be clean with varied food menu 'for differing tastes. . Inuit and northern specialties could be featured as part of the Festival.

The conclusions of the market analysis is that Ontario, Alberta and British Columbia, in that order, are the prime Canada markets with New York, " New Jersey, Penny slvannia, Michigan and I llinois as major U.S. markets. Germany and the United Kingdom should receive initial attention of the overseas markets.

The potential exists of combining various of the tours described above. It is suggested, however, that initial tourism development involve the Lake Harbour Interpretive Boat Tour, one of the Fish Camps (Broughton Island, Arctic Bay or Nottingham I stand) and the Frobisher Bay Toonik Type Tour. In addition, establishment of day trips from Frobisher Bay to one of the Inuit Art cooperatives might also be established.

Tour	. Guided tours not required by schedule of events a necessity.
	. 'Information centre for the Festival should be established.
Marketing	. Fairly broad marketing campaign is suggested.
	. Organized tours through travel agent/ tour wholesaler is suggested.
	This may be one tour which has family appeal so that families with children may be attracted. Marketing campaign should take this into account.
	. Other tours can be marketed in conjunction with this tour.

Summary

Based on the above market analyses, the potential for increased tourism to the Baffin Region exists. Concentration on certain geographic regions is essential to increase awareness of Baffin as a tourist centre. From the analyses, Frobisher Bay as a destination centre and departure point for other tours will increase the need for proper accommodation and eating facilities to be put in place and maintained in Frobisher Bay. A visitor and tour centre, staffed by personnel knowledgeable about all the various points of interest, needs to be established,

Working relationships between tour wholesalers, the airlines, regional and local carriers, hotel operators and tour coordinators will have to be improved. A tourist association involving representatives from al l these sectors and the government is one vehicle which could accomplish better co-ordination of tourism development and marketing in Baffin Region. An example of a useful product from such an association would be a Baffin Region Travel Agents (Visitor) Manual which could be widely distributed (similar in content to the Yukon Travel Agents Manual). Listed in the manual would be maps of the region, avai lable package tours, transportation information, climate, population data, accommodation, etc.

3.0 REGIONAL TOURISM STRATEGY

3.1 Definition of a Regional Tourism Development Strategy

A regional tourism development strategy describes a course of action in terms of broad goals and objectives to direct growth and development in the tourism industry over a ten year horizon. It reflects the objectives of both government and private sector; is sufficiently broad in scope and flexible in approach to accommodate existing conditions; is responsive to a wide variety of short and long term markets, trends and resource development opportunities; and is generally cognizant of local community aspirations and initiatives.

A regional tourism development strategy is broader in scope than a community tourism development plan, yet it reflects the development intent of the community plans.

From a government perspective, the regional tourism development strategy will direct territorial and federal agency funding and programs over the next ten years by providing long term objectives for tourism. It will define areas of public and private sector co-ordination and assist the territorial government in cleat-l y enunciating government policy respecting tourism programs.

From a private sector perspective, the tourism strategy will provide a framework to direct and stimulate investment from the private sector. It will define areas or programs that have potential for tourism development and that require specific entrepreneurial skil ls, and, it wi l l specifically outline promotional and marketing targets.

3.2 Approach to the Development of a Regional Tourism Strategy

The major tasks completed during the entire planning project and their relationships are depicted in Figure No. 1. This flowchart provides a context for the actual process used to construct the regional and community tourism development strategies.

The process used for the preparation of the Tourism Strategy for the Baffin Region began with the identification of the primary goals and objectives which were to be met through the Baffin Region Tourism Development Strategy. It culminated with a description of the alternative strategies each of which satisfied the stated objectives. A detailed discussion of the process is presented in the Planning Process Report. Basically, the five steps of this planning process included:

1) Delineation of the specific goals and objectives to be addressed by the Baffin Region Tourism Development Strategy

The goals and objectives were derived from the Terms of Reference guiding the preparation of this Tourism Development Strategy, from the formal modifications made to the Terms of Reference through subsequent correspondence, from the conclusions reached during the October Workshop/Seminar held in Pangnirtung, and from discussions with senior government officials during the course of the study.

2) Establishment of Planning Principles

The planning principles incorporated the information obtained through the analysis of available literature; through original research into existing programs, into adult education and training services and facilities, and into market-related subjects; through the public involvement program; and through discussions with relevant government officials, tourism operators and private individuals. The planning principles refine the goals and objective statements by defining more clearly the feasibility, appropriateness and acceptability of possible courses of action.

3) Within the context of the planning principles, identification of a process by which alternative ways of satisfying part or all of the goals and objectives outlined in Step 1) can be explored.

In order to explore alternative means of satisfying part or all of the goals and objectives established for the Strategy, a series of questions which explored particular orientations towards the development and management of tourism and recreation resources were postulated. These questions were then restated as development and management options and expressed as important variables to form a framework for structuring alternative strategies.

4) Formulation of concept alternatives and a description of their salient characteristics and implications.

The process utilized in the formulation of alternative tourism development strategies is a creative and iterative process. It is based upon a sound knowledge of the management and operating philosophies of the tourism industry in a national/international context. This knowledge is, in turn, applied to the specific circumstances in the Baffin Region and feasible alternatives are generated based upon:

i) resources and competing opportunities;

ii) markets and market trends;

iii) federal, and territorial goals and objectives for tourism as evidenced in current documentation and internal "anticipated" policy changes;

iv) future societal trends and influences; and

v) industry, community and special interest group concerns and expectations.

The process of combining these elements within a single strategy is a "best fit" approach which involves a number of compromises and trade-offs. The "best fit" strategy is measured against other feasible alternatives, trade-offs are made and a strategy selected.

Three alternative regional strategies were formulated prior to the field program. Briefly described, they were:

ALTERNATIVE TOURISM DEVELOPMENT STRATEGY NO. I

Basic Intent

Alternative Strategy No. 1 focusses upon the creation of an integrated, complementary system of small/simple to large/ complex destination areas centred on or near communities of the Baffin Region. Complementarity is achieved through the assignment of a particular role to each community and the development, to the defined level, of appropriate natural, historical or cultural attractions and associated facilities, services and programs. Integration is achieved through the sequential timing of major events and programs within the context of the realities of travel throughout the Baff in Region. Together they create a system of attractions, programs and events that can be enjoyed in part or all by individuals or groups.

ALTERNATIVE TOURISM DEVELOPMENT STRATEGY NO.2

Basic Intent

The basic intent of Alternative Tourism Development Strategy No. 2 is to select specific natural, historic and cultural resources located throughout the Baffin Region and to develop, package and promote them to specialty markets. The focus wil l be on the creation and marketing of well -organized high quality "one-of-a- kind" experiences of an extended nature resulting in a trophy, product or completed chat lenge. -

ALTERNATIVE TOURISM DEVELOPMENT STRATEGY NO.3

Basic Intent

The basic intent of Alternative Tourism Development Strategy No. 3 is to stimulate each community to prepare its own tourism development plan, and then in the context of those plans, to develop financial, training, technical and marketing support programs that would assist the community in carrying out its plan. The primary characteristics of the tourism industry throughout the Baffin Region would, therefore, be determined by the complementary or competitive decisions and actions of the communities.

5) Evaluation of the Alternative Tourism Development Strategies and the selection of the preferred strategy.

The specific character sties and implications of each strategy were presented at the January 1982 planning workshop attended by both the consultants and officials of the Department of Economic Development and Tourism, Government of the Northwest Territories. The discussions resulted in the selection and modification of the preferred preliminary regional strategy which then formed the basis for the development of community plans during the field program. After completion of the community plans this preliminary regional strategy was further refined during the June planning workshop to support and reiterate the community plans.

The final Regional Tourism Development Strategy is presented below in Section 3.4.

3.3 Goals, Objectives and Principles

3.3.1 Goals and Objectives

The specific goals and objectives guiding the course of the Baffin Region Tourism Planning Study have been outlined in Section 1.2 of this report and need not be reiterated here. Suffice it to say that the aim of the Government of the Northwest Territories in their overall tourism development strategy is:

> "...over the next five years to assist communities right across the Northwest Territories in achieving their tourism revenue and employment objectives. [Hence] this strategy emphasizes the preparation of communities, their residents and their businesses, so that they can be more active participants in the tourism industry. From the viewpoint of the tourist the object of the [N. W. T.] strategy is to provide better facilities and services but most of all to provide more enlightening and satisfying tourism experiences." (5-year N.W.T. Tourism Development Strategy. p.8).

The Baffin Region Tourism Development Strategy has been formulated within the context of the above aim.

3.3.2 Planning Principles

Planning principles refine the goals and objectives established for the planning effort. Derived from resource inventories and analyses, from the community involvement program and from discussions with specialists and government officials, they provide definition and context which shape and guide plan formulation. Planning principles both enlarge upon and restrict the established goals and objectives by addressing and clarifying issues and concerns not considered in the Terms of Reference, and by restating the broad planning objectives in terms of the potential and capabilities of resources specific to the study area.

The following set of planning principles were used to guide the formulation of alternative -tourism strategies for the planning, development and management of the tourism and recreation resources of the Baffin Region.

1) The priority that the Government of the Northwest Territories places upon the development of the tourism sector issue as compared to other resource developments is not at issue, and will not restrict consideration of the widest possible range of opportunities and developments for stimulating the tourism industry within the limits of social and environmental capacities.

2) Tourism is to be primarily a private sector industry. The private sector will be encouraged to take the lead in developing viable operations with the Government involved in the provision of support services (roads, airports, research, general information distribution, etc.). In the short term, the Government will provide incentives to encourage and facilitate tourism development.

3) The tourism industry is to operate under the free enterprise system. In the medium to longer term, businesses are to become self-supporting and government funds are not to be used to prop up failing tourist businesses.

4) The long-term interests of the indigenous population is of paramount importance and, where desired, planning, development and management activities associated with tourism-related developments must minimize destruction of traditional lifestyles.

5) The regional tourism strategy and community development plans must stress Inuit control over the rapidity, scale and direction of tourism-related developments throughout the Baffin Region.

6) All aspects of the regional tourism strategy and the community tourism development plans must be geared, where appropriate or desired, towards enhancing the capabilities of the Inuit people to develop and manage tourism facilities, services and programs.

7) Community-based tourism is considered to be the most appropriate form of tourism for this northern environment. Activities and developments that are centred in the region's communities ensure maximum economic and social benefits to community residents.

8) Except where otherwise decreed by the residents of respective communities, the strategy and plans should emphasize the identification and development of non-extractive, non-consumptive attractions or opportunities so as to minimize competition with the harvesting activities of the Inuit people.

9) Throughout the planning program, the residents of each community are to be provided with sufficient information to allow them to make informed and educated decisions as to the type, level and priority of tourism-related developments within or adjacent to the community. The regional tourism development strategy is to be the policy and program framework that will foster and guide the implementation of the decisions made by each community.

10) Preservation of the unique, fragile and other significant natural, historic, or archaeological resources of the study areas will be emphasized. Their development for tourism and recreation will only be recommended insofar as this development is compatible with the preservation requirements.

11) Existing tourism and recreation developments are not considered as immutable or permanent during this planning process. Their retention, modification or removal will be

recommended if that action is deemed necessary to ensure the achievement of optimum development and use levels of the study area's tourism resources.

12) It is recognized that the development of the Region's natural resources will continue under the direction of both DIAND and the G.N.W.T. It is the premise here, that the resources of the study area will be developed and managed through an integrated resource management plan and program of which the Baffin Region Tourism Development Strategy and Community Tourism Development Plans will form an important part.

13) In the preparation of concept alternatives, the level of financial resources required to implement proposals and programs will not be a major factor in the initial selection and consideration of tourism development proposals. Once the preferred concept/alternative has been identified, the required financial resources and economic feasibility will be determined.

14) The Government of the Northwest Territories will discourage ad hoc tourism developments and will evaluate development proposals on their congruency with the regional tourism development strategy and the respective community development plan.

15) The present training and skill levels of the Inuit, as associated with the planning, development and management of tourism facilities and services, are to be taken into account during the identification and recommendation of tourism development opportunities. The intent is to develop and recommend a phased development and implementation program that reflects and is integrated with the growth of Inuit capabilities.

16) The orientation of the strategies and plans will be more resource-oriented than market-oriented. The characteristics of the natural, cultural and historic resources located throughout the Region will dictate, to a large extent, the market segments or specialty markets to be attracted to the Baffin Region.

17) The regional tourism development strategy will recognize the tourism attractions, services and programs offered throughout the adjacent regions, and will strive to integrate its development and program proposals with those of other regions. However, the consideration of possible options for tourism development throughout the Baffin Region will not be restricted by those existing in, or proposed for other regions.

18) The tourism development strategy and community tourism development plans will be based upon the premise that associated marketing and promotion programs will strive to inform/educate the prospective tourists about the real characteristics of the region's growing tourism industry and its facilities and services, and wil I build a level of expectation that is in conformity with reality.

19) The Regional Tourism Development Strategy must strive to optimize the economic return of tourism to the I nuit of the Baff in Region yet will provide opportunities for all interested residents of the Region to participate in the tourism industry.

20) The priority for the allocation of resources will be to those communities which are interested in being involved in the industry and which have a positive future potential for growth.

The alternative tourism development strategies (briefly described in Section 3.2 and detailed in the Planning Process Report), the selection and modification of the preferred Regional Tourism Development Strategy and the preparation of the Community Development Plans occurred within the framework established by the Planning Principles.

3.4 Regional Tourism Development Strategy

3.4.1 Introduction

In the past, the development of the tourism industry in the Baffin Region has been somewhat limited. Although, as the results of the tourism planning study have indicated, tourism resource opportunities are plentiful, not much as been developed throughout the region in terms of either attractions, events, services or facilities. Growth in tourism has been hindered by three basic factors: distance and travel costs from major markets; lack of awareness of the Baffin Region as a travel destination; and the inability of the tourism industry to meet the needs and requirements of the markets. Tourism development has taken place on an ad hoc basis. Co-ordination of tourism developments and programs within and between the public and private sectors has been difficult to maintain, resulting in a fragmented product that is not responsive to market changes anticipated in the 1980's and 1990's. As indicated by its recently prepared 5-Year-N. W. T. Tourism Development Strategy, the Government is acknowledging tourism as a viable industry and is beginning to provide strong leadership in the planning, program preparation and organized development of the industry. The preparation of a Tourism Development Strategy and its associated Community Tourism Development Plans is a key plank in its support program for the tourism industry.

The Baffin Regional Tourism Strategy is very broad in scope, recognizing the tourism industry's evolutionary process, and the fact that presently the region is underdeveloped as far as tourism infrastructure is concerned. The strategy is flexible in order to accommodate the existing concerns and developments, and to respond to changes in community tourism development plans. In this way it is a reiterative strategy, in that it repeats the community tourism plans, yet accommodates the necessary changes as they occur. It can be responsive to short and long term market requirements and resource and infrastructure development opportunities that wi ll evolve as the tourism industry develops. The Baffin Regional Strategy provides an overall direction for a 10-year planning horizon. Specific direction is being expressed for the first one to five years through the Community Tourism Plans.

The Baffin Regional Tourism Strategy, therefore, is a statement of integrated goals that initially formed a framework for the development of individual Community Tourism Plans. It was then modified to reiterate the direction for tourism development that was expressed in these individual plans. This strategy represents a means through which tourism industry growth can respond in an organized way to market requirements, changes in the industry, and local community aspirations and initiatives.

3.4.2 A Tourism Development Strategy for the Baffin Region

The main emphasis of the Tourism Development Strategy for the Baffin Region is:

> To stimulate the development of predominant y non -consumptive, community -centred tourism in an integrated network of tourism destination areas and destination communities that are linked together by air transportation corridors or boat tours. Development of tourism facilities, attractions and programs will take place along specific themes that will attempt to reflect the natural, cultural, and historic resources and lifestyles of the region. These will aim to attract specific specialty markets to provide structured, programmed opportunities that can be packaged for small group visitation. The bulk of the tourism development will be initiated by the public sector and managed and operated by the private sector. The individual community's decision regarding tourism development will ultimately decide the type and extent of tourism development that will take place in that community.

More specifically, the primary characteristics of the proposed Tourism Development Strategy for the Baffin Region include:

1) Single/Multiple Destinations

The strategy is based upon the development of a hierarchy of tourism destination areas, attractions and faci l ities. This hierarchy defines the role that each community will play in the Region and outlines the level, type and quality of facilities, services and programs to be developed in or near each community to serve the tourism industry. The role envisioned for each community is described in the following sections of the report.

2) Communitv/Land Focus

Emphasis is placed by the Strategy upon the development of specific tourism attractions in or near the community but the degree to which that aim is realized is dependent upon the location and nature of the resources developed to create the attraction. It is mandatory, however, that tourism activities wi l l be co-ordinated out of the community even though the primary focus may be on land or water-based resources. The primary service facilities will therefore be located in the community in so far as that is possible without affecting the viability of the tourism development.

3) Cultural /Naturally istoric Resource-based Tourism

All resources will be evaluated as to their potential for creating specific, high quality tourist attractions. The level and diversity of development potential will influence the role assigned to that community.

4) Resource Preservation/Development

The natural, historical and cultural resources located in or near the community wi l l be developed/used to the degree necessary to create a high quality experience. Wherever possible, development will be in the context of uniqueness, fragility or the significance of the resources and will incorporate measures for protecting the significant characteristics or qualities.

5) Resource Consumption/Non -Consumption

Unless otherwise dictated by the community, the tourism attractions, facilities, events and programs will stress resource non-consumptive forms of tourist activities. The tourist will "learn, observe, and experience" but will not be able to participate in resource consumptive (fishing, hunting) activities that may compete with the subsistence activities of the local population. The basic exception to this general orientation towards non-consumptive tourism will be community directed and controlled trophy sport fishing and hunting excursions.

6) Authenticity /Simulation

Authenticity of experience is the hallmark of this strategy and the primary tourism activities will be centred around existing cultural, natural or historical resources.

7) Incorporation of Existing Developments

Existing tourism attractions and developments will be incorporated in the strategy and the community-based developments to the degree appropriate. Incompatible developments competing with the more appropriate attraction will no longer receive support.

8) Structured/Unstructured Tourism

The strategy focusses on a substantial structuring of primary tourism activities with each element of the experience co-ordinated and organized to ensure that the tourist receives a high quality experience or product. It is, therefore, expected that the major attractions/events for which the community becomes known will be highly structured, but that associated peripheral tourism resources can be enjoyed when one so wishes.

9) Market/Resource Orientation

The availability of the resources will dictate the character of the tourist attraction. Level of development and linkages between developments will be influenced by the requirements of the specific specialty market to be attracted.

10) Broad Range/Selected Markets

The strategy is aimed at the attraction of carefully selected and promoted target market segments.

11) Individual/Group/Package Travel

The tourism attractions/experiences envisioned by the strategy are designed to accommodate small groups. The entire experience from initiation to completion is "packaged" to ensure high quality, desired results,

12) Seasonal/Year-Round Tourism

The nature of the specific attraction will determine the season during which it is carried out. Strong efforts will be made to make tourism activity opportunities available throughout the entire year. It is expected, however, that most tourism will occur during the spring and summer months.

13) <u>Short/Extended Stay</u>

Because of the packaged nature of tourism attractions, it is envisioned that full participation in the offered experience will require an extended stay by the tourist in the region (week plus).

14) <u>Price Sensitivity</u>

All attempts will be made to keep the prices charged for any "package" as low as possible without sacrificing quality of experience. It is expected that the marketing potential of the proposed tourism attraction/experience package will be determined more by the nature and quality of the experience than by the costs incurred in enjoying that experience. It is also assumed that marketing programs will inform the prospective tourist of the realities of travel in the Baffin Region so that an appropriate level of expectation is augmented in the prospective tourist.

15) <u>Recognition/ Non-recognition of Traditional Lifestyles</u>

Although all of the tourism-related developments and programs will be carefully designed to recognize, incorporate and minimize impact upon the traditional lifestyles of the residents, the emphasis upon community-centred tourism, the focus upon resource non-consumptive activities and the requirements for local management, operation and control will most certainly have an impact upon traditional lifestyles. Only where the tourism activity is based upon a continuation of the traditional lifestyles will the impact be minimal. Even the latter's success and feasibility will depend upon the possibility of the harmonious blending of tradition with the requirements of the tourism.

16) **New/Traditional Skills**

A mixture of traditional and new skills will be required to develop/manage and operate the tourism industry of each , community. The particular mix of traditional and new skills required will be dependent upon the type of tourism facilities, programs and services developed in or near each community.

17) **Public/Private Management and Operation**

It is envisioned that the major attraction s/events/programs in each of the communities will be controlled by the community council and either run by the council itself through its "tourism subcommittee", by the Co-op, or by private entrepreneurs through concession arrangements. Private entrepreneurs wil l be encouraged to establish and operate specific tourist attractions within a context of policies and guidelines established by the community council and the government.

18) **I reported/Local Management and Operation**

I n the long-term, it is expected that al l tourism attractions, faci lities, programs and services will be managed and operated by the residents of the community either through the community council or by the private sector. The required capabilities and skil ls wi l l be transferred to the residents through appropriate "hands-on" training programs established by the G. N. W. T. Temporary managers/advisors may have to be hired by the community during the initial stages of the tourism development program to ensure that the tourism industry is well managed until such time as the residents are ready to take over complete control.

19) Public/Private Sector Funding

The characteristics of the individual attraction or development will determine the level of public funding support. It is the intent of this strategy to stimulate private sector investments wherever possible with the public sector providing technical and financial assistance for the upgrading of community infrastructure, the development of accommodation and eating facilities and their initial operation, for the development and operation of training facilities and program and for the provision of special grants to stimulate the development of attractions.

The above characteristics describe the basic direction and intent of the Tourism Development Strategy for the Baffin Region. The developments proposed for each community represent the building blocks through which the Strategy is realized. Together they create policy and program implications for the G. N. W. T. that must be addressed to fulfil I the potential for the growth and development of the tourism industry of the Baffin Region.

3.4.3 Role of each Community within the Hierarchy of Tourism Developments

The Baffin Region Tourism Development Strategy is essentially community focussed. To ensure an optimum realization of the tourism attraction potential of each community within a co-ordinated integrated system, each community has been assigned a particular role to play within the Strategy. This role carries with it a prescribed level of tourism development and was determined only after a careful analysis of its resources, its location, its internal and external linkages, it immediate and long-term potential and the aspirations of its residents. This role is characterized by the fol lowing headings and definitions.

REGIONAL SERVICE CENTRE

1. <u>Definition</u>

A community offering a full range of services to the tourist, including a variety of the types and qualities of accommodation faci lities, food , beverage, and night entertainment facilities, grocery, and other retail facilities, ai t-line charter services, banking facilities, a regional tourism information centre and other related facilities.

2. <u>Communities Assigned this Role</u>

a) Frobisher Bay

REGIONAL GATEWAY

1. <u>Definition</u>

A community where international or domestic visitors commence their visit to the Baffin Region. Such a gateway offers a ful I service airport with scheduled air access to numerous communities within the Baff in Region. Furthermore, it may offer a considerable range of tourism services and accommodation.

2. <u>Communities Assigned this Role</u>

a) Frobisher Bay
b) Resolute Bay

2. Communities Assigned this Role

a) Igloolik
b) Cape Dorset

STOPOVER COMMUNITY

1. Definition

A community offering a range of day-use facilities and services available on a structured, programmed basis. These opportunities and attractions would be limited in extent or diversity and would be complementary to the more abundant opportunities and/or capabilities provided in a neighboring community.

A stopover community would be integrated into part of a tour package, as a short term stopover. Often these communities rely on the fact that they are located on the flight line to a Destination Area or Community.

2. Communities Assigned this Role

a) Hall Beach

OUTFITTING CENTRE

1. Definition

A place the primary purpose of which is to offer a particular service to the tourist by providing equipment, information, guides, transportation and other goods and services that are required by the tourist before leaving the settlement to go out on the land. An outfitting centre is a jumping off point that is dependent upon the surrounding area to provide structured, programmed opportunities for the tourist. It has a basic level of services and is accessible by a full service airport.

DESTINATION AREA

1. <u>Definition</u>

A distinct community -centred geographic area containing one or more attractions and tourism opportunities reflecting, through developments or programs, one or more of the area's dominant historical or natural themes. Visitors could spend a major part or all of their vacation trip in this destination area. Major tourism opportunities are accessible from the central community upon which they are dependent for their services and facilities.

2. <u>Communities Assigned this Role</u>

a) Grise Fjord
b) Pond Inlet
c) Arctic Bay
d) Pang nirtung
e) Lake Harbour

DESTINATION COMMUNITY

1. <u>Definition</u>

A destination community is a community containing one or more attractions and tourism opportunities reflecting, through developments or programs, one or more of the community's dominant themes. It differs from a destination area in that its basis is community oriented tourism opportunities rather than predominantly area dispersed tourism opportunities. A destination community is attractive enough to allow visitors to spend a major part or all of their vacation trip in this community. A destination community offers many services, facilities, attractions, activities, and events to the tourist, but with a somewhat limited variety.

2. Communities Assigned this Role

a) Resolute Bay
b) Clyde River
c) Broughton Island
d) Sanikiluaq

The classification and relationsip of the communities are illustrated on Map No. 2. The developments proposed for each community are summarized in Figure No. 2. Specifically these charts identify each community's role, highlight the basic theme and development intent and describe the development and program proposals. More detailed information regarding the above is available in individual Community Tourism Development Plans prepared for each community.

Role classifications ascribe distinct activities and characteristics to groups of communities. To further reduce competition between the various communities for similar market segments, each community has also been assigned a development theme or orientation that reflect and emphasize the potential of natural, historical and/or cultural resources. Development proposals detailed in the Community Tourism Development Plans embody these themes resulting in a greater possibility for inter-community association and co-operation in the form of land, air or water tours. Complementarity of themes, therefore, diversifies the tourism attractions available throughout the Baffin Region and increases the industry's overall potential for growth and development.

Figure No. 2 presents the basic theme/development orientation ascribed to each community.

3.4.4 Internal and External Linkages

Figures Nos. 3 and 4 summarize the characteristics of tours being offered throughout the Baffin Region by local outfitters and commercial tour operators respectively. The latter are depicted on Map No. 1. At present, these tours form the basic

FIGURE NO. 2

SUMMARY OF COMMUNITY TOURISM DEVELOPMENT PLANS

COMMUNITY	ROLE IN REGIONAL TOURISM CONTEXT	COMMUNITY DEVELOPMENT INTENT	COMMUNITY PROGRAM RECOMMENDATIONS
Frobisher Bay	Regional Service Centre Regional Gateway	Events, attractions and tour packages should be developed to create opportunities for tourists to extent their stay in Frobisher Bay to include over-night or several day durations. Infrastructure is sufficiently developed as to provide a wide range of accommodation and food services.	Regional/Community Information Centre - Displays - Museum - Theatre - Arts and Crafts Boat Tour - Inuit Head Boat Tour - Inner Islands Walking Tours/Hikes Toonik Type Tour Community Host Arts and Crafts Program Cross-Country Ski Tour Boat Tour to Lake Harbour - Cape Dorset Community Improvement Tourism Awareness Program Old OEW Line attraction Feasibility Study of Wharf/Dock
Resolute Bay	Regional Gateway/ Outfitting Centre for boat tours, land tours and fishing camps/ outposts	Resolute Bay should be developed as a major access point from southern population centres with high quality and diverse services and facilities necessary to enable the community to function as a jump-off point for both packaged and unpackaged tours. Most of the attractions and programs developed in the community should be aimed at the short stay visitor.	Tourism Awareness Program Outpost Camp Tourism Development Little Cornwallis Island Mine Excursions Visitor Accommodation Services Community Tourist Co-ordinator Community Improvement Program
Pangnirtung	Destination Area tourism destination area with high quality infrastructure and providing very diverse activity opportunities	The development intent in Pangnirtung is to create structured (packaged programs and services) tourism development opportunities for specific tour group markets.	Duval River Interpretive Hike Mt. Duval Scenic Hike Kilik River Hike Aulasiviktuk Overnight Camp Kingardjuak Tourism Summer Camp Usualluk Whaling Station Tour Kekerten Whaling Station Tour Cumberland Sound Seal Hunt Char fishing Activity Overlord Oay Tour Winter/Spring Snowmobile Tour Arctic Cross-Country Tour Kingnait Fjord Hike Arts & Crafts Program Inclement Heather-Activities Film library Community Host Program Industry Awareness/Marketing Tour Group Outfitting Community Improvement Program Visitor Accommodation Airport Facilities Upgrade Docking/Wharf facilities Utility Services Charter Flight Program Upgrade Territorial Park Search and Rescue Program Community Tourist Board

FIGURE NO. 2 (continued)

SUMMARY OF COMMUNITY TOURISM DEVELOPMENT PLANS

COMMUNITY	ROLE IN REGIONAL TOURISM CONTEXT	COMMUNITY DEVELOPMENT INTENT	COMMUNITY PROGRAM RECOMMENDATIONS
Lake Harbour	Destination Area Interpretation of natural, historical resources	The development intent is to provide organized opportunities to travel on the land or by boat to locations around Lake Harbour. The community would provide limited accommodation services, outfitting, guiding and food services. Any tours or promotional material should include the carvings of Lake Harbour	Tourism Board Lake Harbour Promotional Brochure Boat Tours - short duration - 1-Z day duration Markham Bay Coastal Tour Hikes and Walking Trails Cross-Country Ski Trails Snow Machine Trip to Frobisher Bay Visitor Accommodation Services Old R.C.M.P. Site development
Grise Fjord	Destination Area identification and experience of natural and physical resources and enjoyment of traditional lifestyles.	The suggested approach for tourism development In Grise fjord is to emphasize the packaging and programming of tourism activities for both short stop-off tours and destination tours. Major tourism development opportunities would be accessible from the community at varying distances to accommodate both short and long-term excursions	"Christmas With the Inuit" Tour Package Transient Facility Upgrading Co-op Outfitting Services Snowmobile/Boat Tours Hiking/Cross-Country Ski Trails Expansion/Upgrading of the Community Hall Community Information Program Grise Fjord Lodge Upgrading/Expansion Ski Touring Trails & Cabins Search & Rescue Program Airport Terminal Services Upgrading Handicraft Program Qanaq, Greenland by Snowmobile/Dog Team
Pond Inlet	Destination Area Theme: Identification, Interpretation and experience of natural and physical resources.	Greater emphasis on spring tourism activities tit-eater emphasis on activities out on the land Tours, facility improvements and information programs catering to tourists with a variety of interests.	Koluctoo Bay Spring Program Boat Tours Dock Development Program Cross-Country Ski Tours Canoe and Kayak Program Walking Tour to the Mouth Of the Salmon River Tourist Information Display Area Community Host Program Self-guided Hiking Tour to Mr. Herodier and Albert Harbour Self-guided Hiking Tour to the Salmon River Coal Seams Museum of Native traditions Coffee Shop Project Pond Inlet Community Improvement Program Hotel Development Project

FIGURE NO. 7 (continued)

SUMMARY OF COMMUNITY TOURISM DEVELOPMENT PLANS

COMMUNITY	ROLE IN REGIONAL TOURISM CONTEXT	COMMUNITY DEVELOPMENT INTENT	COMMUNITY PROGRAM RECOMMENDATIONS
Arctic Bay	Destination Area Emphasis upon the development and interpretation of historical, archaeological and cultural resources.	Develop a series of tourism opportunities which take advantage of Arctic Bay's outstanding natural, historical and cultural resources without creating demands for hotel facilities. Encourage spring and summer tourist activity. Develop an extensive cultural experience program. Emphasize connection with Nanisivik.	Arctic Bay Tourism Sub-Committee Community Awareness Program Inumarit Cultural Experience Program Short Tour Development Program Long Tour Development Program Self-Guided Tour Program Bernier Bay Fishing and Naturalist Camp Arctic Bay Promotion program Hotel Development Program Snowmobile Trip between Arctic Flay Igloolik/Pond Inlet
Cape Dorset	Destination Community Emphasis upon Arts and Crafts	The development intent is to take advantage of the great wealth of artistic and historic collections held by various groups in the community. These attractions can be rounded out by short duration trips to the area around Cape Dorset to view historical and natural sites.	Cape Dorset Art & History Centre Accommodation Services Feasibility Study Short Boat Trips Full Oay Boat Trips Overnight Boat Trips Walking Tours Tourism Board Nottingham Island Fishing Lodge - Feasibility
Igloolik	Destination Community Variety of tourism attractions based upon the areas natural, historical resources.	The historical and natural resource opportunities found in and around Igloolik are felt to be attractive enough to develop long-term tour packages. These packages could be developed in conjunction with short-term stays in other communities such as Hall Beach and long-term stays in communities such as Arctic Bay.	Community Tourism Board Community Host Program Visitor Accommodation/Services Inumarit Museum Outfitting Services Community Improvement Program Historical Boat Tours Snowmobile/Dog Team Trips/Inter Settlement Skidoo Trip Three Wheeler Rentals and Island Trails Tourist Information Program
Hall Beach	Stopover Community Day-use activities of few hours duration	The major intent in Hail Beach is to develop alternative opportunities and attractions to the existing fish camp in order to extend the tourist season and provide more economic benefits directly to the community. In its capacity as a Stopover Community, Hall Beach would be integrated into tour packages to Igloolik as a short-term stopover.	Tourism Awareness Program Community Tourism Board Visitor Accommodation Services Hall Lake Fish Camp Community Improvement Program Outfitting Services Snowmobile/Dog Team Trips Historical Boat Tours Community Nest Program Arts and Crafts Program Tourist information Program Airport Facilities Upgrading "Foxe" Tourist Destination

FIGURE NO. ? (continued)

SUMMARY OF COMMUNITY 10(IR 1 SM DEVELOPMENT PLANS

COMMUNITY	ROLE IN REGIONAL TOURISM CONTEXT	COMMUNITY OF VELOPMENT INTENT	COMMUNITY PROGRAM RECOMMENDATIONS
Sanikiluaq	Outfitting Post serving tours throughout the islands and traditional life-styles.	The development intent is 10 provide trips on the land to camping sites and available Inuit summer camps run by the residents of Sanikiluaq. Emphasis should be placed on the use of Sanikiluaq as a jumping off point for trips to view and experience the Arctic Island landscape under the direction of an Unuit Guide. As such Sanikiluaq would provide limited hotel accommodation, out-fitting and guide services, food and airport facilities.	Community Awareness Program Sanikiluaq Tourism Committee Boat/Camping Trips Summer Camp Visit Walking Tours Community Host Program
Broughton Island	Outfitting Centre Theme: Outfitting Centre for short and long boat tours as well as hiking and cross-country skiing tours.	Provide a number of opportunities for travel out on the land In the short-term, provide basic accommodation and services for short stays in the community. In the long-term, provide high quality accommo-dation for longer stays in the community. Promote both spring (frozen water) and summer (open water) tourism.	Community Awareness Program Upgrade Transient Centre Cumberland Peninsula Boat Tour Broughton Island Tourism Co-ordinator Assorted One-day Tours Cross-Country Ski Tour to Auyuittuq National Park Round the Island Hike Promotional Brochure Community Beautification Program Padle Fjord Char Fishing Camp Construction of New High Quality Hotel Polar Bear Hunts
Clyde River	Outfitting Centre for short and long land-based tours into the wilderness.	Conduct a thorough public awareness program. Encourage a very limited and highly controlled form of tourism over the next few years to expose residents to tourism and increase their understanding of it.	Community Awareness Program Tourism Co-ordination Program Limited Tourism Marketing Program Tour Development Program Coffee Shop

FIGURE NO. 3 - OUTFITTERS AND LOCAL TOUR SERVICES

OPERATOR	HEADQUARTERS	SERVICE	SERVICE DESCRIPTION	RATES 1981)
Ikaliut Outfitting Service	Frobisher Bay	Outfitting Service		
Kingalik Outfitters Service	Frobisher Bay	Outfitting Service		
Allooloo's Outfitting	Pond Inlet	Boat Charters	o Arctic char fishing, wildlife photography and sightseeing tours in the Pond Inlet area. o Food and camping equipment supplied. o Tours include Bylot Island Bird Sanctuary.	Various
Special InteresTours	Medina, Washington (Flights leave from Resolute Bay)	"Tramp 'Steamer'" Through the Arctic Skies	o Tourists live and fly with Arctic Bush Pilots - any place, any time, day or night, wherever they go - ferrying men and cargo to remote destinations such as - oil and gas drilling sites; - Inuit settlements; and - natural resource prospecting camps. o Travel with Kenn Borek Air Ltd., unescorted. o Variable itinerary	o Borek Air flights - .64¢/mile to a maximum of $285 /round trip from Resolute. o Accommodation at Borek Crew Complex (Resolute) $80./per day with meals.
Hall Beach Co-op	Hall Beach	Outfitters and Operate Hall Beach Fish Camp	o For description of Hall Beach Fish Camp (see Appendix H.)	

FIGURE NO. 3 - OUTFITTERS AND LOCAL TOUR SERVICES
(Continued)

OPERATOR	HEADQUARTERS	SERVICE	SERVICE DESCRIPTION	RATES (1981)
Ika u t Co-operative	Frobisher Bay	Outfitting Service		
Ayinguk Outfitters (Mick Meekitjuk)	Frobisher Bay	Outfitting Service		
Ika u t Uniat Voyages (Arnaitok Ipee ee)	Frobisher Bay	Outfitting Service		
Peyton Enterprises Limited (Ross Peyton)	Pangnirtung	Fishing	o Operates Clearwater Fiord Fish (see Appendix H.)	$175
High Arctic International Explorers Services Ltd. (Bezal Jesudason)	Reso ute Bay	Fishing	o Operates Lake Hazen Lodge (see Appendix H.)	$125
Grand Ile Hunting Lodge	Montreal	Hunting Lodge	o Operates Grand Isle Hunting Lodge	o $150 00-$200 00/day full American plan

FIGURE NO. 3 - OUTFITTERS AND LOCAL TOUR SERVICES
(continued)

OPERATOR	HEADQUARTERS	SERVICE	SERVICE DESCRIPTION	RATES (1981)
Aqvik Ltd.	Pangnirtung	Outfitting Service		Various
Baffin Kamutauyait	Frobisher Bay	Outfitting Service	o Offers photo safaris, winter snowmobile touring from Frobisher Bay to Lake Harbour, summer cruises around Frobisher Bay, backpacking into mountains around Frobisher Bay and fishing for Arctic char.	Various
Baffin Travel and Charter Service	Frobisher Bay	Fishing Charters and Sightseeing Tours	o Tours in the Frobisher Bay and South Baffin area by a local Inuit family. o Cooking utensils, tents and general gear supplied o July, August, September	Various
Grise Fiord Eskimo Co-op	Grise Fiord	Outfitting Service	o Variety of spring, summer and fall trips to view historic and natural attractions and to fish for Arctic char. o Five spring and one fall trip by skidoo; two er trips by boat.	o $125.00/day including room, guide and entertainment. o $1 395.00 d package tours from Resolute Bay (one week).

FIGURE NO. 3 - OUTFITTERS AND LOCAL TOUR SERVICES
(Continued)

OPERATOR	HEADQUARTERS	SERVICE	SERVICE DESCRIPTION	RATES (1981)
Kayak Enterprises (Pauloosie Keeyootak)	Broughton Island	Outfitting Service		
Qaojisaktik Outfitting (Simonie Alinga)	Frobisher Bay	Outfitting Service		
Idaluit Umiat Voyages	Frobisher Bay	Boat Tours around Frobisher Bay	o Wildlife viewing, sightseeing, photography and fishing	o Various
Tongait Outfitters	Pangnirtung and Hamilton, Ontario	Fishing Holidays	o Tent camp on Kingnait Fiord. o Guided fishing or canoe rental	$100.00/day. All inclusive package tours from Montreal
Qaivvik Limited	Yellowknife	Allen Island Sports Hunts	o 14-day package including airfare from Frobisher Bay, tour of Frobisher Bay, accommodation and meals, one polar bear tag, guide, dogteam, equipment and fleshing of the polar bear hide.	$5 500.00 from Frobisher Ba
Viking Adventures (Koluktoo Bay Fish Camp)	Pickering, Ontario	Tours to Koluktoo Bay and Hall Beach	o See fish camp description in Appendix H.	$185.00/day or $1 995.00 fo 6-day tour from Toronto all inclusive for Koluktoo Bay. $1 595.00 for 7-day all inclusive package to Hall Beach Fish Camp from Toront or Montreal

FIGURE NO. 4 - REPRESENTATIVE COMMERCIAL TOURS

OPERATOR	HEADQUARTERS	SERVICE	SERVICE DESCRIPTION	RATES (1981)
Goliger's Tours	Toronto	Arctic Circle Tour	o One-night jet tours to Frobisher Bay from Toronto or Montreal including round-trip fare, Arctic char dinner, guided tours of village hosted by local escorts, shopping for handicrafts. o Weekends, June and July	o $279.00 plus tax.
		Wilderness Experience Tour	o Unescorted 8-day tour of Auyuittug National Park including airfare, first and last night's accommodation bunk-house style, 2 boat trips, maps, packing lists, etc. o Weekly, mid-July to late August.	o $935.00 from Montreal. o $1 050.00 from Toronto.
		Clearwater Fiord Tour	o 6 to 8-day trip to Clearwater Fiord Fishing Camp on Cumberland Sound. o Weekly, mid-July to late August	o $1 600.00 or $1 975.00 for 6 or 8 days respect-ively from Montreal. o $1 715.00 or $2 090.00 for 6 or 8 days respect-ively from Toronto.
		Baffin Island Adventure Tour	o 9-day tour to Frobisher Bay (1 night), Pond Inlet (3 nights) and Pangnirtung (4 nights). o Weekly, mid-April to mid-September.	o $2 060.00 from Montreal. o $2 175.00 from Toronto.
Horizon Holidays of Canada	Toronto	Eastern Arctic Safari	o 8-day tour to Baffin Island visiting Koluktoo Bay, Pond Inlet, Pangnirtung and Frobisher Bay. o For groups on special request only o July.	

FIGURE NO. 4 - REPRESENTATIVE COMMERCIAL TOURS (Continued)

OPERATOR	HEADQUARTERS	SERVICE	SERVICE DESCRIPTION	RATES (1981)
Special InteresTours	Medina Washington	Discover the Worlds of the Arctic Tour	o Tour oriented towards Inuit culture interpretation includes visits to Grise Fiord and Lake Hazen. o July departure.	o $3 055.00 from Yellowkni
		North Pole Tour	o Ellesmere Island including visit to Grise Fiord as well as flight to the North Pole. o April departure.	o $4 750.00 from Resolute.
		Polar Ice Cap Tour	o 11-day trip includes flight to the Polar Ice Cap and visits to Lake Hazen and Grise Fiord. o April departure.	o $2 790.00 from Resolute.
		Arctic Wilderness and Char Fishing Tour	o Trip to Lake Hazen and Koluktoo Bay for fishing, and scenic and wildlife viewing. o August departure.	o $2 520.00 from Resolute.
A'looloo's	Pond Inlet	Boat Charters	o Arctic char fishing, wildlife photography and sight seeing tours in the Pond Inlet area. o Food and camping equipment supplied. o Tour [illegible] lude Bylot Island Bird Sanctuary.	Various
Hefner Travel	Los Angeles California	Caviar at the North Pole Tour	o 10-day trip takes travellers to lunch at North Pole. Stops at Resolute, Eureka (Ellesmere Island), Lake Hazen and Grise Fiord and the North Magnetic Pole. o Activities include champagne and caviar lunch at the North Pole, expendition to the Fosheim Peninsula and an evening party at Grise Fiord. o Departures March to June.	o $3 300 from Edmonton (19 rate) including transportation, meals, accommodation and guide.

FIGURE NO 2 - REPRESENTATIVE COMMERCIAL TOURS
(Continued)

OPERATOR	HEADQUARTERS	SERVICE	SERVICE DESCRIPTION	RATES (1981)
Canatrek Mountain Expeditions	Banff, Alberta	Arctic Exploration Tour	o 15-day trip includes a few days in Grise Fiord, travel by canoe to Starnes Fiord, and day trips from Starnes Fiord to loca peaks. o August departure.	o $850.00 1979 rates)
Consolidated Tours Ltd.	Montreal, Quebec	Visiting the Inuit of Pond Inlet Tour	o 6-day trips to the Pond Inlet region, including day trips to Bylot Island, wildlife viewing areas and historic sites. o August departures.	o $1 075.00 round trip fro Montreal. o $1 145.00 from Hamilton 1979 rates)

tourism linkages between communities throughout the Baffin Region and external communities and market areas. The tours proposed by the Regional Tourism Development Strategy augment and redirect those existing tourism tin kages.

Figure No. 5 describes the proposed tours and illustrates their integration with existing tours. Only those tours that are dependent upon the facilities and attractions of two or more communities are described here. Those that originate and end in the same community are fully described in each of the Community Tourism Development Plans.

The High Arctic Tours presently being promoted by I nterestours cover most of the areas of concern to this study. Their activities shou ld be supported, and integrated with the developments proposed in or near Resolute Bay, Grise Fjord and Lake Hazen.

The priorities for development and implementation of each tour are described further or in this report.

3.4.5 Policy and Program Recommendations

The specific actions required to implement the regional tourism development strategy and the associated community plans are detailed in Section 5.0, Implementation Program. The intent here is to describe the primary activities required to create the context for the implementation of al I specific actions. The descriptions are organized as fol lows:

1. Selling the Industry
2. Legislative and Policy Framework
3. Organization and Responsibilities
4. Research and Planning
5. Staff Development and Training
6. Marketing
7. Monitoring and Revision

FIGURE NO. 5 - INTER COMMUNITY TOURS AND LINKAGES

Tour No.	Theme/Description of Attractions	Communities & Their Role	Relationship to Existing Tours	Markets	Duration	Approx. Cost	Time of Y
1.	Interpretation/enjoyment of the natural resources of the Cumberland Peninsula by air, land ● nd sea. The tour would access scenic wonders and outstanding concentrations of northern Fauna ● nd Flora	Originating in Frobisher, the tour follows essentially a circular route connecting Pangnirtung and Broughton island. Pangnirtung is the host community providing high quality services and facilities with Broughton Island serving as a major outfitting and supply centre. The tour is composed of an escorted hike through Pangnirtung Pass and ● boat trip from Broughton Island around the head of the Peninsula back to Pangnirtung (or vice versa).	The proposed tour can incorporate the Wilderness Experience Tour promoted by Goliger's Tours an unescorted O-day tour of Auyuittuq National Park can be separate, oriented towards different market segments. Can also be complementary to F.O.N. tour of region around Broughton Island for naturalists.	Primary focus of tour in terms of markets will be: general public, with an interest in e northern experience from wilderness, scenery and natural resources basis. (10 people maximum) (4 tours maximum)	2 Weeks: 1 nt Frobisher 1 nt Pangnirtung 5 nts Park 1 nt Broughton 4 nts Water 1 nt Pangnirtung 1 nt Frobisher	$3.200.00 to $3,600.00 from Montreal	August
2.	Wilderness Travel ● nd Camping during the frozen *spring* period in Auyuittuq National Park.	Trip from Broughton to Pangnirtung via North Pangnirtung fjord ● nd Pangnirtung Pass by cross-country ski to enjoy the outstanding scenery of Auyuittuq National Park Reserve. Skiers arrive from Frobisher, ski to Pangnirtung and fly back to Frobisher (or vice versa).	No regularly scheduled tour for southern market segments cover this route.	Market Segments: Younger, adventurous cross-country skiers. (10 people maximum) (5 tours maximum)	1 Week: 1 nt Frobisher 5 days in Park 1 nt Pangnirtung	$1,600.00 from Montreal	Mid April to the end of May
3.	Interpretation/enjoyment of the natural/historic/cultural resources of the Neta Incognita Peninsula and Cape Dorset. The tour beet will stop at main historic/scenic attractions throughout the entire tour with special events and activities scheduled at Lake Harbour, Cape Dorset and Frobisher.	The tour is composed of two ● atn parts: Frobisher to Lake Harbour, Lake Harbour to Cape Dorset with air connections to and from Frobisher. Passengers can therefore board at Frobisher, ● nJoy the entire cruise; disembark or board at Laka Harbour if that is their desire. Frobisher would serve as the main service centre, while Lake Harbour and Cape Dorset would serve as multiple attraction communities as well as replenishing centres. The trip originates alternatively from Frobisher and Cape Dorset.	No regularly scheduled tour is presently in place. The tour cen tie in with F.O.N. tours to Cape Dorset and the Lindblad tour throughout the N.W. Atlantic, but these would have no major influence on schedule or length or number of passengers if conflicts arise.	Market Segments: Nature enthusiasts, individuals interested in diverse cultures and histories, general public interested in a northern experience without 'roughing" it. (20 people ■ animua) (2 tours maximum)	Duration: Whole Trip 3 Weeks 2 nts Frobisher 6 nts Water 2 nts Lake Harbour 6 nts Water 2 nts Cape Dorset Frobisher	$4,000.00 to $4,500.00 from Montreal	End of Jul to the end of August
4.	Lake Harbour-Frobisher Bay Cross Country trip *taking* advantage of the natural and historical features.	The objective of this tour would be to take advantage of the established overland route between Lake Harbour and Frobisher Bay to create a unique arctic travel experience by snowmobile. Tour could be one way with either Frobisher Bay or Lake Harbour as a destination point with a return flight or two way by snow machine.	This trip has been run as a race during past Frobisher Bay Toonik Tymes, and in the past by various outfitters when the need arose. Tour can therefore formalize this route and tie in with springtime celebrations.	Market Segments: All market segments travelling to Frobisher Bay (16 trips maximum) (no. of people per trip at outfitters discretion).	Duration: Full Trip 5 days 1 nt Frobisher 1 nt en route 1 nt Lake Harbour 1 nt en route 1 nt Frobisher	$500.00 to $600.00 from Frobisher	Spring: April/May
5.	Overland trip between Igloolik, Arctic Bay and Pond Inlet and return for a complete Arctic experience ● nJoying many traditional ways of life, igloo making, dug-sledding, snowmobiling and the cultural attractions of the communities.	The tour is e 3-part circular tour which can be taken in parts or altogether. The tour can also *be* in both directions and can tie in with airflights between all communities. Example: dog sled from Igloolik to Arctic Bay, snowmobile from Arctic Bay to Pond Inlet and air flight back to Igloolik. The purpose would be to enjoy the natural/cultural attractions and opportunities in each community tied to a tour experience through the frozen Arctic by either dogsled or snowmobile.	The communities are presently linked together by air via the Eastern Arctic Adventure or Eastern Arctic Sampler tours run by Goliger's. No overland tours exist. Any 1%1 of the overland tours can potentially fit in with the Goliger's tour except that scheduling may be a problem. The tour can also be an extension of the F.O.N. nature tour to Pond Inlet and Bylot Island.	Market Segments: Naturalists, Wilderness orient.a,l travel lens. Although fully escorted and serviced, these trips may require some screening and/or pre-conditioning for the people wishing take the trip. (Maximum 4-5 trips per leg for dogsled - 6 people/trip 10 trips for snowmobile 10 people/trip).	Duration: 1) Dog Sled; 2 weeks 2) Snowmobile; 5 days	$3,500.00 to $4,000.00 for entire trip from Montreal	Spring

FIGURE NO. 5 - INTER COMMUNITY TOURS AND LINKAGES

Tour No.	Theme/Description of Attractions	Communities & Their Role	Relationship to Existing Tours	Markets	Duration	Approx. Cost	Time of Year
6.	Inuit Heritage and Culture Tour. The intent of this tour is to display and interpret to the tourist the diversity of heritage and culture existing throughout the Eastern Arctic.	The communities connected by this tour would include Frobisher Bay as a service centre, Cape Dorset, arts and crafts, Igloolik for history and pre-history, Arctic Bay for the Innumait Cultural Experience Program and Grise Fjord as the most northern Inuit Settlement. Resolute Bay could also serve as a service centre. Sanikiluq could eventually be added to this tour.	The Eastern Arctic Sampler Tour presently run by Goliger's could be modified to reflect this more defined theme, dropping only Pond Inlet and Pangnirtung and adding Arctic Bay and Grise Fjord.	Market Segments: General public with an interest in different cultures enjoyed in a controlled environment. Number of people controlled by size of charter, number of trips controlled by demand.	1 Week 1 " Frobisher 2 nts Cape Dorset 1 nt Igloolik 1 nt Arctic Bay 1 nt Grise Fiord 1 nt Resolute Flight by Charter	$3,300.00 to $3,600.00 from Montreal	Spring and summer tourist season
7.	Eastern Arctic Tour with special ● ctivties/events arranged in each community visited, ranging from short boat tours, to visits to arts and crafts activities, to festivals.	Eastern Arctic Tour originates in Frobisher Bay and then travels to Pangnirtung, Broughton Island, Clyde River, Pond Inlet, Nanisivik, Arctic Bay, Igloolik, Cape Dorset, Lake Harbour end Frobisher Bay. At each community the tourist would experience a different activity, specifically arranged for them. (Possible activities: Pangnirtung - visit to the Park; Broughton Island boat trip; Clyde River visit to Igloo Bay; Pond River - fishing camp, barbeque; Nanisivik mine visit; Arctic Bay - Inumarit Culture Centre; Igloolik - three-wheel tour; Cape Dorset - arts and crafts activities; Lake Harbour visit to soapstone quarry, etc.)	Extended version of Goliger's Eastern Arctic Adventure, with a greater emphasis upon providing memorable activities at each stop.	Market Segment: General public with an interest in visiting different places in an escorted controlled manner. Number of people controlled by size of charter, number of trips controlled by demand.	14-20 days 1 nt Frobisher 1 to 2 nights in each of the communities depending upon activity	$3,500.00 to $6,000.00 depending upon cost of arranged activities. From Montreal.	Spring and summer tourist season
8.	High Arctic Tour: a demanding Arctic wilderness experience by dogsled end ski from Resolute Bay to Qanaq, Greenland.	Originating in Resolute Bay, the adventures will travel by dogsled and ski to Grise Fjord, to Lake Hazen and then to Qanaq, Greenland. This trip can be enjoyed as part or all with supply services at each community and where required, at intermediate stages. The trip is designed for once-in-n-ltfetlme experience for wilderness enthusiasts.	Although no tour ● xtsts at the present time, the High Arctic Tour can be interyrated with those run by Interestours, notably: Discover the Worlds of the Arctic, or Its Polar Ice Cap Tour.	Market Segment: Experienced wilderness travelers.	To be established. 40+ days?	$5,000.00 to $7,000.00	Spring and summer

1. Selling the Industry

The tourism industry of the Northwest Territories suffers from an ambivalence of attitude towards its present and potential contribution to the general economy of the Territories and the desired style and standard of living of its residents. This attitude is a product of many factors: The recent emergency of the industry as a recognizable contribution to the economy, its rather haphazard, unguided growth and development, the lack of basic information about its real performance and economic contribution and the uncertainty of its potential. The ambivalence is present throughout the government, the community and the private sector.

The government needs to be sold on the idea that substantial investment into the tourism industry will result in short- and long-term economic and social returns that will make that investment desirable. It needs to be persuaded that the requirements of the tourism industry are reasonably compatible with the requirements of other private and public sector resource demands. The tourism industry must demonstrate that the government will not be trapped into a long-term commitment that will be a heavy drain on its human and financial resources and be a political as well as an economic millstone detrimental to the realization of other goals.

To persuade the government that the tourism industry can make a substantial contribution to the economic and societal well-being of the territories, the following are recommended:

a) The preparation of a distinctive, factual information package for distribution throughout the senior levels of government that details in a succinct format.

   the present characteristics and contributions of the tourism industry;-

- the activities undertaken to reduce defined data deficiencies, program deficiencies and other problems or obstacles to '-the growth and development of the tourism industry;

- the short and long-range actions or programs still required to realize the potential of the industry;

- the compatibility of the tourism industry as envisioned with the aspirations of residents or with other resource development requirements;

- etc.

The intent of the information package is to anticipate all questions related to investment/support of the tourism industry by the government and to provide answers that in total will establish the desirability of substantial government support. Much of the information required to produce the package is already available but it is the contention here that requires modification and integration to serve the objectives described above.

b) The preparation, review, final ization and legislative adoption/ endorsement of a N. W. T. Tourism Development Strategy based upon the requirements detailed in the information package and its supporting documents. The N.W.T. Tourism Development Strategy needs to contain:

- a long term and short term goals and objectives statement;

- a broad policy framework to guide research planning, development and marketing activities;

- technical and -financial support parameters and priorities;

- broad financial parameters for program development; and

- public and private sector responsibilities.

The intent and purpose of the N.W.T. Tourism Strategy is not to identify specific development opportunities and actions but to set the basic legislative program and financial policy framework within which more specific regional strategies and community development programs can be prepared. Again much of the information, goals and policies have already been put in place or are being considered. What is required is the integration of all material and thoughts into a specific policy framework that spells out the program wishes and the priorities of the government.

The residents of the N.W.T. in general and the Baffin Region in specific have a more basic problem. Most of them do not have a clear understanding of what a tourist is, does and seeks, and they have not yet grasped the concept that a stranger represents an exploitable developable industry. Questions associated with why these strangers wou ld choose to come to visit their area or community have their origin more in a general lack of understanding of "traveling for pleasure" than in a believe that their resources are/must be less of an attraction for tourists from those located in other areas.

To sell the tourism industry to the residents and the communities, therefore, is more of an educational program and requires:

i) The preparation of a Community Awareness Program that should contain the following elements:

a) Definition of a Tourist: Who they are, where they come from, what they would like to see and do, why the-y act like they do, etc.

b) Characteristics of a Tourism Industry: What makes up the industry, what kinds of facilities, services and programs are required, how it should be run, what the operators shou ld know and do, etc.

c) Community I evolvement and Control: How the community can benefit from these visitors, what the community can and should control; how problems can be reduced, etc.

d) Government Help: The kinds of assistance programs the government has to help the communities in obtaining their goals.

The program should be presented in stages; each stage being followed by community discussions guided/assisted by the Area Economic Development Off icer. Questions raised at each stage can then be satisfactory l y discussed and answered before the next stage is ‘introduced. Presentation and discussion of the next component of the Community Awareness Program should occur when the Area Economic Development Officer is satisfied that there is a reasonable understanding and acceptance of the previously presented information.

The program should employ media that are compatible with the li kings and levels of comprehension of the audience. It should be built around portable audio/ visual systems and informal community discussions. The proposed Community Development Plan that has been prepared for each community can be used as an example, as an illustration of what is meant by the various statements of suggestions found in the Communtiy Awareness Program.

ii) As a corollary to i) the effectiveness of a Community Awareness Program is highly dependent upon the firm adherence by the Territorial Government to a particular orientation and policy framework for the development of the tourism industry throughout the Baffin Region; the development and consistent application of the conditions and requirements of its technical and financial assistance programs; and, the removal of program ideosyncracies and anomalies that have no applicability under the particular conditions under which the tourism industry of the Baffin Region must survive. Consistence in broad policy and flexibility in detail must be the hallmark of government actions.

It is believed that the non-tourism oriented component of the private sector of the Northwest Territories can be sold on the benefits of the tourism industry if:

i) the requirements and benefits of the tourism industry are detailed in information packages that are easily available to the private sector.

ii) there is a consistent legislative and policy framework in place that firmly reviews the requirements of all resource use sectors and does not unnecessarily restrict the activity of certain resource users for the benefit of other resource users.

iii) There is an integrated resource development and management strategy in place that clearly outlines the goals and objectives of the government, the plans and procedures that are to be followed to satisfy those goals and objectives, and the consistent yet flexible application of rules, regulations and requirements.

In short the major opposition to the growth and development of the tourism industry by the private sector can be reduced to acceptable '-levels by the provision of long-range information and the development of government programs that allow the private sector to prepare long-range plans. '

2. Legislative and Policy Framework

The tourism industry must operate within a policy and guideline context that clearly defines the opportunities and constraints that are placed upon the tourism industry in general and on the operators/entrepreneurs in specific. The government of the N .W. T. therefore needs to put a tourism related legislative and policy framework in place that creates that context.

Ideal ly, the following elements should be considered on the Territorial level.

a) The preparation of an integrated Resources Planning and Management Strategy and its formal adoption by the Legislature. This strategy would provide the context for the finalization of a Territorial Tourism Development Strategy.

b) The finalization of a Northwest Territories Tourism Development Strategy and its adoption by the Legislature. The strategy would embody broad policy statements that would give direction to al l aspects of regional strategies and community plans.

c) The preparation of specific policy guidelines and procedural documents that would assist those to be prepared for each region.

The following documents and statements should be prepared for the implementation of the Baffin Regional Tourism Development Strategy.

a) A concise summarization of the primary characteristics and programs of the Baffin Regional Tourism Development Strategy; its present-ation to and formal adoption by the Legislature.

b) The preparation of policies and guideline statements in such areas as:

i) Ownership and Investment Policies and Guidelines

ii) Facility and Attraction Planning and Development Policies and Guidelines

iii) Accommodation Type and Quality Policies and Guidelines

iv) Quality Control Policies and Procedures

v) Outfitting Policies

vi) Resource Consumptive Tourism Policies and Guidelines (Hunting and Fishing)

vii) Artifact/Historic Resource Protection and Development Policies and Guidelines

viii) Education/Training Policies, Guidelines and Procedures

ix) Technical Assistance Policies, Programs and Procedures

x) Financial Assistance Policies and Programs and Guidelines

xi) General Research and Planning Policies and Guidelines

xii) Boating, Water Touring Policies, Guidelines and Procedures

xiii) Search and Rescue Policies and Procedures.

xiv) Live-in Agreements, Policies and Procedures.

xv) Others as required related to community control, protection of traditional lifestyles, control of advertising, restricted access areas, etc.

All of these policies and guidelines may exhibit some overlap. It is essential, however, that each stands on its own and addresses all of the important aspects related to that area of concern being:

i) intent and specific objectives of policy document

ii) area of coverage or applicability

iii) specific policies

iv) criteria for applicability

v) exemptions

vi) application procedures, contracts, forms

vii) organization responsible for implementing policies

viii) penalties for non-compliance

ix) other related policies and guidelines

It may be necessary to address the same policy statements to different audiences requiring different format, style of writing, illustrative material, translations and so on, but the ultimate application of the policies will still have to be consistent to promote the development of a cohesive, integrated industry.

3. Organization and Responsibility

Tourism planning and development crosses all levels of jurisdiction and requires the involvement of a wide number of federal, territorial, municipal and private organizations. Effective, efficient implementation of programs and policies required to stimulate and guide the growth of the tourism industry is dependent upon full co-operation of all relevant parties having specific jurisdiction and responsibilities. If vagueness and uncertainties exist with respect to areas and degree of jurisdiction and associated responsibilities then these should be clarified as soon 'as possible.

The ultimate aim of the Baffin Region Tourism Development Strategy is to optimize the economic and social benefits derived from Community -Centred Tourism **where the quality and quantity of basic returns to the residents of the various communities are collectively controlled by the residents of those communities. This aim provides direction as to the level and type of responsibilities that each relevant party should assume.**

FEDERAL : **The basic relevant responsibilities of the federal government is to provide a realistic yet supporting policy and program context within which the tourism industry of the N.W.T. can flourish; including**

i) **the fostering of an integrated resource development and management planning program for the Northwest Territories and the Yukon Territory;**

ii) **the ensuring of fair recognition and consideration of the tourism resources and industry during that planning process;**

iii) **the development of broad national tourism policies (embodied in a strategy) that sets the context for the growth and development of the tourism industry of the Northwest Territories;**

iv) **the stimulation of inter-territorial -provincial co-operation;**

v) **the development of specific technical and financial assistance programs or agreements that will assist the Northwest Territories to fulfill its tourism potential;**

vi) the provision of on-going technical expertise and advise in al I areas of relevance to the tourism industry.

TERRITORIAL : The responsibilities/j urisdiction of the Territorial Government in general will be similar to those of the Federal Government except that they deal specifical l y with the Territories and include:

i) the development of an integrated resource development and management plan for the Northwest Territories;

ii) the allocation of sufficient human and financial resources to permit the implementation of the Strategy and its regional derivatives in an orderly and phased manner;

iii) the stimulation of inter-territorial -provincial co-operation; the stimulation of inter-regional integration and co-operation;

iv) the development of territorial resource planning, development and management policies, programs and procedures.

The Department of Economic Development and Tourism would be assigned the specific responsibilities for implementing, guiding and monitoring the specific elements of the Territorial Strategy. The central office would, on a Territorial basis:

a) Stimulate the preparation of regional strategies.

b) Monitor the work and activities of organ izations and associations.

c) Prepare the overall capital and O & M budgets and forecasts.

d) Provide/prepare specific policy documents as outlined in Section 2 above.

e) Provide technical advise and assistance to the Region.

The regional office would carry out the same responsibilities at the regional level and would (Baffin Region)

a) Implement the regional tourism development strategy and its specific programs.

b) Ensure that all territorial policies, plans, programs and procedures recognize and incorporate the specific requirements and conditions of the region.

c) Co-ordinate activities with other Regional departments and the Baffin Regional Council.

d) Process applications for technical, financial and other forms of assistance from community councils, co-operatives and private entrepreneurs.

e) Prepare regional capital and O & M budgets.

f) Conduct monitoring, quality control and other administrative functions.

g) Carry out particular studies for assessing the potential and economic viability of tourism developments.

h) Carry out/direct specific research and planning studies.

i) Provide direction, information and liaison services to community councils and co-operatives.

j) Other activities of similar nature and scope as required to stimulate and direct the development of the tourism industry of the Baffin Region.

BAFFIN REGION COUNCIL: The Baffin Regional Council serves to focus the requirements and concerns of the Community Councils throughout the Baffin Region and can assist the Department of Economic Development and Tourism to sell and implement the Baffin Region Tourism Development . Strategy by

i) reviewing the Strategy, and recommending its implementation to its members;

ii) reviewing the specific regional policies produced under the Strategy to ensure that they are compatible with the aspirations of the Council and are applicable to community situations;

iii) assisting the Department in establishing short and long term priorities for tourism development;

iv) ensuring that other resource development and use activities recognize the requirements and contributions of the tourism industry.

COMMUNITY COUNCILS: Within the context of Community Centred Tourism, the community councils have jurisdiction over:

i) the scale and type of tourism development permitted in the community and the rapidity by which the industry is allowed to grow;

ii) the conditions under which tourism developments are allowed to develop and their ownership pattern;

iii) operation and management policies and procedures within the context of safety and health requirements.

4. Research and Planning

As previously stated, the tourism industry of the Baffin Region is of rather recent origin and has not yet had the time nor the resources to establish as comprehensive a data base as available for the southern region of Canada. There are a variety of areas which require specific investigations to reduce these data deficiencies and provide sufficient information for identifying realistic investment opportunities. Areas requiring investigation include:

a) Natural, Physical, Biological Resources

Only particular portions of the Baffin Region have been investigated in detail, and where the resultant data base is sufficiently comprehensive to identify the location, quality, significance and attraction of a diversity of tourism opportunities. Efforts should be made to co-ordinate the bio-physical resource investigation activities of D.I.A.N.D., D.O.E., Parks Canada, D.O.T. and Territorial Departments and other agencies and to modify these investigations to insert the collection of data in a form and to a depth of relevance to the tourism industry. To initiate this co-ordination, the Department should prepare descriptions of the type and level of information required and the format in which it would be most useful, and to distribute these descriptions to all organizations conducting various types of field investigation programs. Presentation of these data requirements and the benefits derived from "piggy back" operations to the Territorial Senior Land Use Committee, the Federal Interdepartmental Co-ordinating Committee and like organizations, may create a receptivity of benefits to the entire tourism industry.

b) <u>Historical and Archaeological Resources</u>

The knowledge about the extent, location, fragility and significance of the Regionts historical and archaeological resources is far from complete. Again relevant Federal and Territorial agencies should be asked to co-ordinate their research activities to develop a much more comprehensive data base. Without this information it is extremely likely that highly significant resources of great value to both the region and the tourism industry will be unwittingly destroyed through large-scale resource exploration and development activities.

c) <u>Tourism Facilities and Services</u>

Within this category there are a number of areas into which further research is required.

i) market investigations to obtain a much greater understanding of the specific origin, size, profile requirements and expectations of relevant market segments.

ii) design investigations to obtain information on efficient effective design/construction of a wide range of tourism facilities ranging from cruise boats through interpretation facilities to high quality hotels.

iii) feasibility investigations to develop a data bank on exactly how much it costs to plan, construct, operate and promote various types of facilities, attractions and services.

iv) operation and maintenance stud ies to develop techniques, procedures and other elements required to administer and physically maintain tourism developments within the context of isolation and limited ski I ls.

5. Staff Development and Training

Much effort has to be directed towards the development of innovative ways and means by which the skills required to phase, develop, operate and administer tourism-related facilities, services and programs. The basic skill-level is extremely low, although there is reason to believe that the aptitude is quite high.

The results of the special study into the training requirements for the tourism industry and the related delivery systems available throughout the Baffin Region and the Northwest Territories can be found in the report: Baffin Region Tourism Planning Study: Analysis of Relevant Adult Training Programs. The basic recommendations of the study are:

i) Future adult training efforts MUST be regionally based if they are to succeed at the level needed to provide a sufficiently skilled work force to successfully support local economic developments.

ii) An "Inuit Employment Training Centre" should be developed in Frobisher Bay. Its mandate would be to serve the Baffin Region by training adults for identifiable regional employment opportunities. The thrust of the Centre would be to train the Inuit adult in such a way that upon graduation, employment within the Region would be a probability; employment in work environments that would be shaped to the bilingual /bicultural reality of the Baffin Region.

iii) In the absence of the "Inuit Employment Training Centre", an Employer Host Training Program be established which is based upon the use of existing people and facilities to provide on-the-job training to meet the needs of a growing tourism industry. What is proposed is a system that provides short-term 'hands-on' training programs for adults in which basic skills and knowledae are stressed.

iv) A "Baffin Region Program Planning Committee" should be struck under the guidance of the Regional Supervisor of Adult Education. Members should include: program development specialists, an individual knowledgeable about Inuit culture and language, professional teachers, representatives from the business community and an Adult Educator. Their role would be to provide/develop employment oriented adult training programs.

v) The Regional Supervisor of Adult Education, with the assistance of the Northwest Territories Department of Economic Development and Tourism, should acquire adult training program manuals/course outlines and related resource materials from across Canada.

vi) A manual should be developed under the guidance of the Regional Supervisor of Adult Education to assist instructors/ teachers from southern Canada to teach effective y in the Baffin Region.

vii) The Regional Supervisor of Adult Education should initiate action aimed at establishing a "Regional Training Resource Centre" to be located in Frobisher Bay. This Centre would be model led after "Teachers Resource Centres" in southern Canada and be modified to the degree necessary to meet the challenges of Adult Educators in the Baffin Region.

viii) Larger operating budgets should be given for Continuing Education programs in the communities to encompass the requirements of tourism training.

ix) Action should be initiated to arrive at a mutually satisfactory agreement on the role A. V. T. C. programs and personnel will/can play in the Baffin Region related to Adult Training in general and Tourism Training in specific.

x) The Tourism Industry businessmen in the Baffin Region should be organized into an association that helps sell the Eastern Arctic to tourists; provide a forum for addressing mutual concerns; undertake to identify existing skill needs in the industry; function as a Tourism Trade Advisory Group to help shape relevant adult training programs; and other related activities.

xi) A multi-media education campaign should be undertaken by business and government for the purpose of educating Baffin residents about the Tourism Industry and Tourists.

xii) A campaign should be organized to educate the Tourist as to the realities of the Eastern Arctic.

xiii) Government incentives should be developed to stimulate more hiring of local people in the existing Tourism Industry.

The Regional Tourism Strategy endorses these recommendations with the following elaborations.

1. Inuit Training Centre is a desirable long-range goal and should be seriously considered. The responsibility for establishing such a centre falls outside the jurisdiction of the Department of Economic Development and Tourism and must be co-ordinated by the relevant departments of the G. N. W. T. responsible for education programs and facilities.

2. The characteristics of the proposed employee host training program as outlined in the report Analysis of Relevant Adult Training Program should be endorsed-in-principle by the Department of Economic Development and Tourism and be used to develop a model tourism skills training program in a selected community. The model tourism skills training program actually blends the characteristics of Action Plans 2 and 3 as described in The Adult Training Report.

This blending is recommended because there are few facilities presently available to accommodate an employee host training prog ra-m, and because the development proposals for Pangnirtung lend themselves to the initiation of model employee host training programs.

3. The Community of Pangnirtung, because of its status of tourism planning, its understanding and acceptance of the requirements of the tourism industry and its attractions should be selected as the model community in which the employee host training programs are initiated.

4. The new facilities and attractions to be built in Pangnirtung, as outlined in the report Pangnirtung Community Tourism Study, shou ld be designed/modified to allow the employee host tourism training program to be included.

5. The general guidelines presented in Figures 30 and 31 in the report Analysis of Relevant Adult Training Program be implemented/used to structure the employee host training program.

6. The specific recommendations and suggestions outlined in Action Plan #2, Employee Host Training Program, and Action Plan #3, Tourism/Hospital ity Business Models be given serious consideration and be modified to reflect the development, scale and timing of tourism facilities, attractions and services detailed in the Pangnirtung Community Tourism Study.

7. A very specific package describing intent, actions, and programs should be produced, be translated into I nu ktitut and be discussed with the Community of Pangnirtung, other community councils, Baffin Regional Council, government departments and tourism operators to foster acceptance, use and support.

6. Marketing

Many of the initiatives and '-programs identified in the June 1982 Tourism Development and Marketing Strategy for the N .W. T. are new and have not yet been tested in implementation.

The focus of the Marketing Strategy is on the following programs:

A. Information Dissemination Program.

1. Explorers Guide & Map (existing
2. Special Interest Pamphlets (expanded)
3. The Successful Explorer (new)
4. Cultural Presentations (new)
5. Awareness of Tourism (new)
6. Community and Highway Information Services (existing)
7. I nformation/Reservation System (being developed)

B. Consumer Promotion

1. Tour publications (to be expanded)
2. Direct Mail Marketing (to be expanded)
3. Promotion/Presentation Items (to be expanded)
4. Attendance at Sport and Travel Shows (to be expanded)
5. Development of Travel Exhibits (new)
6. Explore the Arctic (new)
7. Trevel Promotion Film (new)

C. Market Research and Planning

1. Market Research Program (existing)
2. Annual Marketing Plans (new)

D. Assistance for Industry Promotion

1. Marketing Skills for Tourist Operators (new)
2. Package Tour Promotions Support (new)
3. Zone and Co-op Promotions (new)
4. New Markets, New Promotions (new)
5. Holiday at Home (new)
6. "You can Mix Business with Pleasure" promotion (new)
7. "Lots to Do" promotion (new)

E. Trade Promotions

1. Travel industry Supplement to the Explorer's Guide (existing)
2. Attendance at Travel Agent Gatherings (existing)
3. Rendezvous Canada (existing)
4. Canada West (existing)
5. Meetings and Conventions Program (new)

Many of these marketing efforts address in a more or less general way, the specific requirements of the Baffin Region. Each, nevertheless, should be carefully scrutinized for direct applicability to the Region and be tailored, where necessary, for the maximum benefit of the tourism industry of the Eastern and High Arctic. In addition to the activities required to "Sell the Industry" as described above in Section 3.4.5.1, the following marketing activities are crucial to the successful development of the Tourism Industry.

1. Define Target Market Segments very carefully.
2. Market existing developments and attractions - not potential.
3. Focus on Uniqueness, Adventure, Once-in-a-lifetime experience.
4. Prepare realistic promotional material and keep the material updated.
5. Focus on Tour Operators and Travel Agents.

6. promote complete, well-organized thematic tour packages.
7. Piggy-back promotions where possible but do not lose sight of specific Baffin Region requirements.
8. Get all interested/affected parties involved in promotion.
9. Monitor effectiveness of promotional efforts very carefully.
10. Co-ordinate all marketing efforts through a central office in Regional Headquarters.
11. Priorize promotional efforts and areas to reduce direct competition and increase complementarily.

7 Monitoring and Revision

The tourism industry of the Baffin Region is in its fledgling stage and if present planning efforts are successful, wil I enter into a developmental phase that is characterized by change and apparent chaos. It wil I be absolutely necessary to introduce as part of major planning, development, management and promotion activities, a feedback system to flag problem areas as they arise. Monitoring and related revisions to programs and activities will be required in such areas and activities as:

1. Market Trends and their specific application to the Baffin Region.
2. Visitor Profiles and Expectations
3. Community Aspirations and Reaction to tourism
4. Applicability and Effectiveness of Training Programs and delivery systems
5. Applicability and Effectiveness of Policy Statements and implementation Procedures
6. Inherent and latent discrimination
7. Applicability and Effectiveness of Technical and Financial Support Programs
8. Effectiveness of the internal organization of the tourism industry
9. Capabilities of Staff Resources
10. Effectiveness of Promotional Efforts
11. Actual and specific economic spin-offs and leakages.

4.0 ECONOMIC AND FINANCIAL ANALYSIS OF SELECTED DEVELOPMENT

4.1 Approach

In order to test the financial and economic viability of the recommended tourism strategy, 10 year pro-forma cash flow analyses and income impacts were developed for several selected projects. From these selected developments, a projected economic impact of the entire recommended tourism strategy is developed at both Community and Regional levels. General conclusions are drawn about the financial viability of certain categories of tourism projects.

In terms of the definitions used in the analysis, financial liability refers to the net income (deficit) before taxes and debt service. Economic viability is the overall benefit to the community and includes both operating and construction jobs and revenues and the spin-off effect (economic multiplier). The economic multiplier results because the infusion of tourism expenditures are used by the tourism industry to purchase goods and services in the local economy generating greater economic activity than is represented by the actual direct tourism revenue.

4.2 Selection of Developments

In order to test the financial viability and economic impact of the recommended tourism strategy three (3) projects were selected which are considered representative of the types of projects recommended. These three projects are:

1) Frobisher Bay - Lake Harbour - Cape Dorset Boat Tour
2) Inuit Heritage and Culture Tour
3) Fish Camp

In addition, the Consultants did a detailed analysis of the community tourism projects recommended for Cape Dorset and had the experience of the Pangnirtung Community Tourism Study which includes anal yses of a major commercial accommodation project and the small tour boat operation.

The three analyses studied in detail assume full occupancy from the initial year of operation. While this may be likely because of the small number of guests, some caution in interpreting the results is advised as there may be organizational, marketing and promotional difficulties in the beginning which could lead to less than 100% occupancy during the first year of operation.

4.3 Financial and Economic Analysis

4.3.1 Frobisher Bay - Lake Harbour - Cape Dorset Boat Tour

Based on the assumptions listed below, the operation of a boat tour from Frobisher Bay to Lake Harbour to Cape Dorset is financially viable if the capital costs for an appropriate vessel (ranging from 500 000 to $2.0 million) is totally forgivable (see Table 6). The net income before debt service of $45 600 to $80 500 is only sufficient to carry a loan of approximately $300 000, well below even the lowest estimate of the capital cost. The rationale for such a write down include the creation of 8 direct part-time positions, the expenditure of $192 000 annually (1983 dollars) by tourists, and additional support to the existing hotel operation in Frobisher Bay and Cape Dorset. Indirect impacts of such expenditures through income and employment multipliers are expected to be relatively high for direct wages because leakage of such income to other areas would be difficult. For other direct expenditures, items I i ke fuel, the leakage is likely to be high. It is estimated that the overall income and employment multipliers would be in the order of 2.0. This would place the total expenditures (direct and non-direct) at $384 000 (1982 dollars) and would provide a total of 16 part-time seasonal positions.

FIGURE NO. 6

FROBISHER BAY - LAKE HARBOUR - CAPE DORSET BOAT TOUR

FEASIBILITY ANALYSIS ($000's)

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
evenue	192.0	211.2	232.3	255.6	281.1	309.2	340.1	374.2	411.6	452.7
perating Expenses										
Uses	21.0	23.1	25.4	28.0	30.7	33.8	37 2	40.9	45.0	49.5
Food Crew & Passengers	36.4	40.0	44.0	48.4	53.3	58.7	64.5	70.9	78.0	85.8
Insurance	25.0	27.5	30.3	33.3	36.6	40.3	44.3	48.7	53.6	58.9
Disbursements in Frobisher Bay/Cape Dorset	15.6	17.2	18.9	20.8	22.8	25 [illegible]	27.6	30.4	33.4	36 8
[illegible]ue	23.4	26.9	30.9	25.6	40.9	47.1	54.1	62.2	71.6	82.3
otal Operating xpenses	121.4	134.7	149.5	166.1	184.3	205.0	227.7	253.1	281.6	313.3
eserve For aintenance/Repair otal Operating xpenses	25 0	27.5	30.3	33 3	36 6	40 3	44.3	48.7	53 6	58.9
et Income Before ebt Service and Taxes	45.6	49.0	52.5	56 2	60 2	63.9	68 1	72.4	76.4	80.5

There are two other sources of benefits which are possible from the operation of this tour. While no new major construction is considered to accommodate this tour itself, the tour combined with other sea related developments in the region may provide the need for new wharf facilities particularly in Frobisher Bay. This would provide many construction jobs. Further the possibility of joint use of the vessel for cargo either during the summer season or in the off-season would create the need for at least extending the seasonal employment base of the crew of the boat. An alternate way of testing the market is to lease a vessel capable of adequately accommodating the tour for a period. While this may be marginally more expensive in the long run it should provide a better opportunity to judge the acceptance of the market to such a tour. It would also allow an assessment of the capability of staff to organize and run such a tour. Part of the cost of leasing the vessel could be contributed from the revenue associated with the maintenance/repair reserve.

Assumptions

- Three 2-week one way tour from Frobisher Bay - Lake Harbour - Cape Dorset 650 mile trip or return.

- Escorted Tour includes on-board accommodation for 12 nights and 1 night accommodation in Frobisher Bay and Cape Dorset each. No on-land accommodation assumed at Lake Harbour.

- Food except for nights spent at Frobisher Bay and Cape Dorset will be purchased as part of the tour.

- Accommodation and food at Frobisher Bay/Cape Dorset treated as a disbursement.

- Air Fare to Frobisher Bay/Cape Dorset not included in the tour cost.

- When first tour ends at Cape Dorset return passage to Frobisher Bay will be with second tour.

Market Projection

- Three 20-person tours should be easily sold to the Ontario/ Eastern USA market.

Revenues

- Inclusive boat tour (excluding air fare) marketed for $3 200 Canadian per person double occupancy.

- Revenue increased by 10% per annum.

Operating Expense

Uses Total Crew of 8

Captain @ $3 000 per month - 2 months

5 Crew Members including Cook and Maintenance Staff

5 @ $1 200 per month - 2 months

Tour Guide/Operator @ $1 500 per month - 2 months

Food Expenses

36 days with passenger @ 40 days of crew meals, food cost estimated at $40 per person per day at $35 per day per person

Insurance/Licensing

Assuming $7 500 per month for the 2 months when operating and a vessel replacement value of $1.0 million, the insurance costs would be $25 000

Fuel

Although it depends on the type and size of boat, the number and condition of engines, a figure of $12/mile is a reasonable figure

Disbursements

Based on the 1 night and food per passenger in each of Frobisher Bay and Cape Dorset @ $260 per person

Revenue For Maintenance/Repair

The yearly difference between revenue and operating expense. The actual amount will depend on the boat purchased.

Marketing/Organizational Expense

- No direct marketing or organizational expense is shown against the tour as it would be marketed as part of the overall Baffin Region Marketing program. If marketed separately, brochures distributed to tour wholesalers/agents at an annual cost (1982) of $3 000± should be included in the cost estimates. Organizational expenses of $7 000 (part-time person) should also be be included. In the initial years this could come from the reserve for maintenance and repair.

Capital Expense

- The price for the proper boat will vary greatly depending on sea worthiness, whether its new or used, whether the tour boat will also act as a cargo carrier during the off - season, etc. The cost ranges from $500 000 used passenger only to $2.0 million[1)] new double hulled steel construction, twin engine (single-screw) 80 foot boat.

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1) Canada Shipyard, Collingwood, Ontario

4.3.2 Inuit Heritage and Culture Tour

Baased on the assumptions listed below, the operation of the Inuit Heritage and Culture tour is marginally viable in a financial sense (see Table 7). The revenues cover all of the operating expenses including the airplane rental. However, the net income before taxes is rather marginal and anything less than full occupancy on any of the tours could place the tour in financial jeopardy. The possibility of running larger tours was also analyzed but the inability of some locations to handle larger aircraft and the proportionally larger airplane rental cost offsets the potentially larger revenues.

The tourism expenditures of $145 800 (1982 dollars) creates 3 direct part-time jobs. With the spin-off effects, the total economic impact is estimated at $291 600 (1 982 dollars) and the impact is expected to create a total of some 10-15 job opportunities (most of which if not all would be seasonal).

Assumptions

- consists of 7 nights, one night each in Frobisher Bay, Igloolik, Arctic Bay, Grise Fiord and Resolute Bay and two nights in Cape Dorset.
- Escorted Tour includes all air fare from Frobisher Bay and accommodation and meals for 7 days and nights.
- Tour transportation will be via a chartered Twin Otter holding 18 tour passengers, 1 tour guide and 2 crew members.

Market Projection

- Tour can run for up to 10 weeks per summer. Initially assume 3 tours each fully booked, 18 persons per tour.

FIGURE NO. 7

INUIT HERITAGE AND CULTURE TOUR

FEASIBILITY ANALYSIS ($000's)

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
Revenue	145.8	160.4	176.4	194.1	213.5	231.8	258.3	284.1	312.5	343.8
Expenses										
Airplane Rental	79.7	87.6	96.4	106.0	116.6	128.3	141.1	155.3	170.8	187.9
Crew Disbursements	5.5	6.0	6.6	7.3	8.0	8.8	9.7	10.6	11.7	12.9
Hotel/Food Disbursements For Tour Passengers & Tour Guide	51.9	57.1	62.8	69.0	75.9	83.5	91.9	101.1	111.2	122.3
Tour Guide Salaries	2.0	2.2	2.4	2.7	2.9	3.2	3.5	3.9	4.2	4.7
Tour Expenses	4.1	4.5	4.9	5.4	5.9	6.5	7.2	7.9	8.7	9.5
	143.2	157.4	173.1	190.4	209.3	230.3	253.6	278.8	306.3	337.3
Net Income Before Taxes	2.6	3.0	3.3	3.7	4.2	4.5	4.7	5.3	5.[illegible]	6.5

Revenues[1)]

0 Inclusive tour cost from Frobisher Bay and return at $2 700 Canadian per person.

Operating Expenses[1)]

Airplane Rental

The cost of rental for a 19 passenger Twin Otter is $3 150 per day (1982 dollars). Allowing for 10% inflation the cost of a plane for 3 weeks (21 days) in 1983 is estimated at $79 700 including fuel and crew. Not included are crew disbursements and meals estimated at $130 per person (2-man crew). According to Bradley Air Services, the daily service charter rate alone would be in effect as the plane would be used exclusively for the tour. The use of a larger plane eg. 44 passenger Hawker Siddley 748 is precluded as Grise Fiord cannot accommodate a plane of this size.

Hotel/Food Disbursements

Hotel and food disbursements of $130 per day per person for the 18 tour passengers and one tour guide has been allowed.

Tour Guide Salaries

A salary of $500 per week for the three weeks of the tour and one week for training.

Tour Expenses

Miscellaneous expenses on the tour including honorarium etc. , for some of the leaders at the communities visited has been calculated on the basis of $75 per person on the tour.

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1) All revenues and expenses increased by 10% per annum.

4.3.3 Fish Camp

Based on assumptions noted below, a fish camp such as the one proposed at Hall Beach is a financially attractive venture which produces a significant cash flow after allowing for debt service ($33 200 in 1983). See Table 8.

Besides the direct employment of 5 seasonal and direct expenditures of $108 000 (1983 dollars) the economic impact of the project is estimated to have an economic impact of $215 000 and be responsible for a total of 8-12 seasonal jobs.

Assumptions

- 18-man fish camp (100% occupancy) for 5 weeks during the summer. The fish camp is composed of canvas tents on wooden floors, 6 men per tent. There are a total of 5 tents; 3 for guests, dining tent and 1 staff /supplies tent. Tour includes air transportation via charter Twin Otter and 6 days fishing with 1 guide per 6 fishermen.

Revenue

- Inclusive tour cost from Frobisher Bay is $1 400.

Expenses

Staff Costs

3 Guides at $300 per week for 6 weeks including start up
1 Cook at $350 per week for 6 weeks
1 Manager/Owner at $400 per week for 8 weeks

Food Costs

Based on $20 per day per person for 35 days including staff

5. **Overnight Boat Tours**

a) **Revenues**

10 passengers per week (3 **days) for 10 weeks @ $300.00** per person $ 30000

b) costs

i)	**Oil and gas**	480
ii)	**Food @ $25 per person**	7 500
iii)	**Insurance and Licence**	1 000
iv)	**Promotion**	1 500
v)	**Repairs/Maintenance**	1 000
vi)	**Assistants Salary (2) $5.00 per hr 30 hours per week for 10 weeks**	3 000
vii)	**Allowance for capital payment and Operator's salary**	15 520
	Total Costs	**$30 000**

c) **Employment**

i) **Operation staff: 2 seasonal**

d) **Economic Impact**

- Estimated to be 2x revenue $60 000

6. **Walking Tours**

a) Revenues — None

b) costs

i) Salary of 2 guides/ maintenance staff 10 weeks, 40 hours per week $5.00 per hour — 4 000

ii) Maintenance (minimal)

c) Employment

i) Operation staff: 1 seasonal

d) Economic Impact

- Estimated to be 2x salaries $8 000

7. **Tourism Board**

a) Revenues — None

b) costs

i) Honorarium — 6 000

ii) Staff 1 @ $7.50 per hour, 40 hours per week 10 weeks — 3 000

c) Employment

i) Operation staff: 1 seasonal

d) Economic Impact

- Estimated to be 2x salaries $18 000

The above process and assumptions were used to establish the operation and maintenance costs of various types of developments, an estimate of probable revenues and employment and the expected economic spin-off created throughout each community.

4.4 Economic and Financial Analysis Summary

The detailed analysis of selective tourism related projects and the projection of economic benefits by communities leads to the following conclusions and recommendations, see Figure No. 9:

1) Most small tour operations can be profitable given the market created by the larger scale projects in the various regions. The revenues created are generally sufficient to cover al I operating expenses and allow for amortization of the tour operator's capital investment (boat, etc.). The employment created is seasonal and the opportunity exists for tour operators to supplement their income by using their equipment for non-tourism related projects. It is recommended that the smal I private sector interests be encouraged to operate these small tours and that the GNWT provide marketing and business management assistance to such operators.

2) Most large scale tour operations and commercial accommodation projects can cover al I their operating expenses and provide some amount of cash flow to cover a portion of the debt associated with the capital investment. Because of the heavy capital investment and lack of the necessary cash flow to fully amortize the capital, it is recommended that the GNWT consider building the recommended larger scale tour operations and commercial accommodation and concession them to private sector interests to run. The concession arrangements should be structured so that the GNWT can approve the operational character sties of the project. The concession fee should be established separately for individual projects and should be a relatively nominal percentage of gross revenue in early years to allow the operators to become established. The concession agreement should be reviewed periodically (every 3-5 years) to update the arrangements and reflect the cu rrnet economic conditions.

The GNWT should consider providing marketing assistance to these concession operations and should encourage package tours involving several of the projects. These major tour operations and commercial accommodation facilities will provide the largest number of full time jobs created by the recommended tourism projects. These projects are also the single most important element in attracting the market to the region. All other tourism projects in the community depend on these projects being in place and operating effective y.

3) The infrastructure, cultural and information related tourism projects generate little or no revenue and therefore are not able to cover their potential expenses. As a result, from a financial perspective there is little likelihood of attracting private sector investment and management interest in these projects. These projects are considered necessary in enlarging the experience of visiting the various communities and provide an important link to the small tour operators. The GNWT really has little alternative but to build and operate such facilities themselves. The timing of these projects should coincide as much as possible with the major tour operations and commercial accommodation projects to maximize the impact of the capital investment.

The analysis on Figure No. 9 indicates that the capital investment by the GNWT (excluding capital associated with small tour operations) for all the suggested tourism projects is some 14.5 million. The direct and indirect jobs created as a result are some 264-347 construction jobs (equivalent to 131 man-years of employment). The number of full time jobs created to operate and manage the projects is estimated at 28 and there are an estimated 162-202 part-time jobs created.

When the spin-off effects, (multiplier impacts) are taken into account, there is an estimated $5.2 million generated by the capital construction program and an annual amount of $5.5 mil lion (1982 dollars) generated as a result of the operational component. When the 10 year present value of the annual operational component is added to the construction component, as estimated $49.7 mil l ion in income is infused into the Baffin Region from the capital investment of $14.5 mil lion.

FIGURE NO. 9

SUMMARY OF COSTS/EMPLOYMENT OF DEVELOPMENT PROPOSALS

Community	Capital Cost (Average)	O & M Costs (Annual)	Direct Revenues (Annual)	Jobs Created Construction Man-Years	Jobs Created Construction No. of Jobs	Jobs Created Operation Full-Time	Jobs Created Operation Part-Time	Economic Spin-off Construction	Ecomonic Spin-off Annual O & M	
	1982 Dollars	1982 Dollars	1982 Dollars					1982 Dollars	1982 Dollars	
1. Frobisher Bay	2 873 000	409 800	69 200	26	50-60	2	19-22	1 040 000	235 600	
2. Resolute Bay	852 500	154 200	216	8	15-20	2	6-8	320 000	432 000	Accommodation services partial return on capital. Other commercial ventures break even with no return on capital.
3. Pangnirtung	2 500 000	364 000	418 000	5	50-75	6	18-20	1 000 000	836 000	Accommodation and tour sectors allow for partial repayment of capital investment. Cultural and infrastructure projects generate little or no revenue per se but are required for the revenue generating project.
4. Lake Harbour	974 000	296 300	273 500	7.5	15-20	4	12-14	300 000	572 600	Accommodation services: no return on investment. Boat-camping tours break even with variable allowances for operators salary and capital repayment.
5. Grise Fiord	515 000	29 600	21 500	5	10-15	0	5-7	200 000	43 000	Accommodation services: no return on investment. Tours break even. All other programs do not return O & M costs.
6. Pond Inlet	1 312 600	285 600	386 600	12.5	20-25	3	18-20	500 000	792 200	Accommodation services: partial return on investment: coffee shop and tours break even with variable allowances for operator's salaries.
7. Arctic Bay	725 000	225 740	21[illegible] 400	6	15-20	1	20-25	240 000	440 200	Museum does not return operating costs, transient centre and tours break even with variable allowances for operators' salaries and capital repayment. Hotel: no return on investment.

FIGURE NO 9

(Continued)

SUMMARY OF COSTS/EMPLOYMENT OF DEVELOPMENT PROPOSALS

Community	Capital Cost (Average)	O & M Costs (Annual)	Direct Revenues (Annual)	Jobs Created Construction Man-Years	Jobs Created Construction No. of Jobs	Jobs Created Operation Full-Time	Jobs Created Operation Part-Time	Economic Spin-off Construction	Ecomonic Spin-off Annual O & M	
	1982 Dollars	1982 Dollars	1982 Dollars					1982 Dollars	1982 Dollars	
8. Cape Dorset	1 987 500	342 512	242 700	16	30-40	5	10-12	640 000	606 900	Museum does not return operating costs. Accommodation services partial return on investment, tours break even with variable allowances for operator's salary and capital repayment.
9. Igloolik	840 000	181 160	165 600	7	18-22	2	14-18	280 000	342 400	Accommodation services break even. Tours break even with low allowances for operators' salarie no capital repayment, museum does not return operating costs.
10. Hall Beach	780 000	193 600	76 800	6	12-16	0	18-26	240 000	353 600	Fish camp breaks even with little return on capital, hotel occupancy expected to be low, hence may not return operating costs. Tours break even with no capital repayment.
11. Sanikiluaq	45 000	34 000	21 200	10	5	0	6-8	40 000	68 000	Boat tours/camping trips, summer camp visits break even with variable allowances for operator's salary and capital repayment.
12. Broughton Island	1 058 500	348 250	359 800	10	20-25	2	14-18	400 000	719 600	Both transient centres and new hotel provide partial return on investment. Tours/trips breal even with variable allowances for operator's salary and capital repayment.
13. Clyde River	55	53 500	28 600	1	4	1	2-4	40 000	100 200	Coffee shop may break even depending upon occupancy rate of transient centre/hotel.
TOTALS	14 518 100	2 918 262	2 598 900	131	264-347	28	162-202	5 240 000	5 482 300	

5.0 IMPLEMENTATION PROGRAM

5.1 Approach to the Establishment of Priorities

The establishment of priorities for a myriad of research, planning, and development and management activities is dependent upon the subjective integration of a number of wide ranging considerations derived from all aspects of the study. Such considerations include:

1. The location/qua lity/uniqueness and attraction potential of the natural, historical or cultural resource.

2. Market potential of those resources and the desirability of those market segments.

3. The level of capital investment required.

4. The capability of the government to provide the necessary financial, technical and support staff.

5. The aspirations of the community and the level of interest in the development of the tourism industry.

6. The capability of the community to manage/control tourism related developments and the type/number of activities that have to be undertaken to develop that capability in the community.

7. The degree to which that study, plans, policy, programs or development is necessary to permit/stimulate other dependent actions.

8. The complexity of the project and the number of jurisdictions involved.

An "overlay" process was used to establish community and regional development priorities and involved the following steps:

1. Determine the priority of the community or unique development based on the existing developed and undeveloped resources (natural, cultural, physical). The criteria included the suitability and abundance of tourism resources, level of existing infrastructure development, and the role of the community in the regional tourism hierarchy which reflects tourism resource potential.

2. Determine the priority of the community or unique development reflecting the market potential of the relevant development programs. The market potential was based on the market summary as presented in the preceding chapter.

3. Document the initial community response encountered during the winter community visits.

4. Document the planner's assessment of the communitys' receptivity for tourism and the planner's perception of the communitys' eventual decision regarding tourism.

5. Assess the communitys' present capability for satisfying the needs of desired tourism market segments.

6. Determine the degree to which the present and future tourism attractions recommended for each community can complement those of other communities.

7. Assess the degree to which complementary developments can be integrated into tourism packages.

8. Assign an overall priority ranking for each community based on the assessments carried out during Steps 1 to 7. (See Figure No. 10)

FIGURE 10

ASSESSMENT OF PRIORITIES FOR TOURISM DEVELOPMENT

BAFFIN REGION TOURISM DEVELOPMENT STRATEGY

Community	Priority Based on Resources	Priority Reflecting Market Potential	Initial Community Response	Consultant's Perception of of Eventual Response	Present Capability	Oegree of Complementarity	Linkage Potential	Overall Priority (Community)	Area Priority
Frobisher Bay	medium	high	positive	positive	medium-high	high	high	I	11
Resolute Bay	medium	medium	lack of interest	neutral	low-medium	medium-high	medium-high	111	IV
Pangnirtung	high	high	positive	positive	medium	high	high	I	I
Lake Harbour	low	medium	positive	positive	low	high	high	I I	11
Grise Fiord	high	high	positive	positive	low	medium	medium	11	IV
Pond Inlet	medium	medium	neutral	neutral-positive	low-medium	medium	medium	111	111
Arctic Bay	low-medium	medium	positive	positive	low	medium	medium	111	III
Cape Dorset	high	high	positive	positive	low-medium	high	high	11	II
Igloolik	medium	medium	neutral-positive	neutral-positive	low	medium	medium	111	III
Hall Beach	low	low	positive	positive	low	low	medium	IV	III
Sanikiluag	low	low	neutral-negative	neutral	low	medium-high	low	V	V
Broughton Island	medium	low	neutral	positive	low	high	high	III	I
Clyde River	low	low	neutral-negative	neutral	low-medium	low-medium	medium	V	V

9. Considering all aspects, assign long-term Area Development Priorities encompassing groups of communities.

After the above long-term development priorities were established, an assessment was made of the need for specific policies, guidelines and support programs and their preparation was assigned a relative priority.

5.2 Regional Policy and Program Priorities, Phasing and Responsibilities

5.2.1 Area Development Priorities

The Area Development Priorities, established according to the process outlined in Section 5.1 are outlined on Drawing No. 2. The reasons for their relative ran king are summarized below.

Priority I Area Pangnirtung - Broughton Island

Reasons:

1. Basic recognition by the residents of Pangnirtung of the benefits that can be derived from tourism.

2. Fair experience with the requirements and activities of groups of tourists.

3. Capability of existing natural, historic, and cultural resources throughout the area.

4. Complementarity of communities in roles and attractions and the variety of l in kages possible.

5. Fair nucleus of tourism infrastructure and attractions and relatively high flow of tourism around which expansion can occur.

6. Availability of a tourism development plan for the community of Pangnirtung and its acceptance by the residents.

7. Expression of interest by the government to support the construction of tourism facilities and services proposed by the Plan.

8. Excellent opportunity for integrating the facility and program requirements of the employer host training program into the new tourism facilities and attractions.

9. Potential for the development of a variety of viable tourism experiences that can be packaged and promoted to specific market segments.

10. Relatively easy access from the Regional Service Centre and from Nuuk, Greenland.

11, Once basic services and facilities are in place, excellent potential for attracting tourists from Greenland.

<u>Priority I I Are</u>a Frobisher Bay - Cape Dorset - Lake Harbour

Reasons: This area has similar levels and ranges of tourism development potential as the Priority I Area and most of the positive aspects of the Priority I Area apply. Nevertheless, it has been lowered in Priority for the following reasons:

1. Each community plays a substan ial role in stimulating development of the tourism industry throughout the southern part of Baffin Region. Particular facilities, services and programs have to be put in place to fulfill those roles. Much work wi 11 have to be done before those facilities, services and programs can become real ity.

2. Lead time is required for the discussion of tourism benefits and requirements with the residents of each community, especially Cape Dorset and Lake Harbour, and the elaboration/ endorsement of the respective community plans ' and tours.

3. Lead time is also required to co-ordinate the research, planning, development and management of the tourism attractions, services, programs and tours proposed for the area to ensure that all communities wi l l benefit fairly from, and can absorb the impact of, tourists attracted to the area.

4. Because of the diversities of facilities, programs and tours proposed, the government will require greater lead time to prepare interim research, planning, management and support policy statements and provide a favorable context for the initiation of the actual developments of tourist faci lities.

Basically, the Frobisher Bay - Cape Dorset - Lake Harbour has been allocated Priority I I because of its greater comp lexity, its lesser state of readiness to accommodate tourists, and the greater lead time requ i red to take advantage of the existing tourism potential. I n actual fact, the priorities for the two areas are very close and comp lementary.

Priority III Area Pond Inlet - Arctic Bay - Igloolik - Hall Beach

Reasons: 1. The residents of all communities are generally in favour but essentially neutral on the subject of tourism development. A fairly comprehensive community awareness program will have to be conducted before positive, active interests can be expected.

2. Few residents have specific experience or understanding of the requirements and activities of groups of tourists.

3. Except for certain exceptions such as Bylot Island, the scenic attractions of Arctic Bay and the thule sites near Hall Beach, the area's natural, historical and cultural resources are neither outstanding nor unique within the Regional context and will require more elaborate development and packaging to realize their tourism potential.

4. The communities are complementary in nature and can be linked for a variety of experiences.

5. Existing tourism infrastructure is minimal and will require diversification and upgrading before the tourism potential of the resources in or near the communities can be realized.

6. Substantial lead time will be required for discussion of the nature and character of the tourism industry, the role of the communities as envisioned in the Regional strategy, and the responsibilities of the residents before the communities will be in a position to evaluate the proposed community development plan and actual capital developments can be undertaken.

7. All communities are relatively easily accessed from the Regional Service Centre and the Regional Gateways, permitting the development of tour packages that link all communities yet can be initiated at any one of the communities.

In summary, the Pond Inlet - Arctic Bay - Igloolik - Hall Beach Area has fewer existing and potential tourist attractions than the higher priority areas, is not as familiar with the basic requirements and characteristics of a tourism industry, is not yet ready to adopt tourism as a "major" industry, requires greater new investment of monies to develop adequate infrastructure and requires a substantial ly greater lead time to finalize the policy, development and management of tourism opportunities.

Priority I V Area Resolute Bay - Grise Fiord

Reasons: The area depicted on Drawing 1 as Priority I V Area is basically an anomaly created by its diverse characteristics:

1. High resource capabi l ity and attraction yet difficult to access and develop.

2. Direct air linkages with Yel low knife yet travel between the communities and/or attractions is limited by cost, distance and frequency.

3. Positive interest in the development of variable tourism activities in one community, not in the other.

4. Relatively adequate tourism infrastructure in one community not in the other.

5. The requirement to stimulate community-centered tourism countered by proposals and activities to develop for distant tourist attractions.

6. The complements of potential tourism attractions with high linkage potential, reduced by the difficulty of developing and marketing economical l y viable tour packages within the extremely short season.

7. The potential of resource exploration and development by other economic sectors, and the uncertainty as to how those activities are going to help or hinder the development of the tourism industry.

The long-term priority for the area is, therefore, more a product of uncertainty as to the degree of future impacts of present resource exploration, extraction and development proposals (including natural parks) and a need "to go slow" to ensure flexibility in reaction than of the specific tourism potential of the area's resources, attractions or cultural character sties.

<u>Priorty V Area</u> Clyde River - Sanikiluaq

Reasons: Both areas have been given a Priority V rating for all or some of the fol lowing reasons.

1. Relatively low resource attraction and diversity.

2. Lack of understanding by the residents of the characteristics and requirements of the tourism industry.

3. Neutral to negative reaction of the residents to the development of a community -centred tourism industry.

4. Absence of a tourism infrastructure.

5. Low '-to medium capability to complement the attractions and developments of nearby communities, hence a lower capability to form a major component of a tour package.

Both communities have particular characteristics that can support the tourism industry of the Baffin Region. This potential cannot be tapped until the community seeks the development of their tourism resources. Both communities in the short-term will benefit from a well-prepared, well-presented community awareness program to stimulate discussions as to the desirability of tourism and its impacts upon the community.

5.2.2 Area Program Priorities and Phasing

The programs to be established for the implementation of the Regional Development Strategy as described previously throughout the report are summarized, phased and costed on Figure No. 11.

The specific activies to be undertaken are proposed under the categories of:

1. Strategies, Policies and Programs: This figure lists and priorizes the activities that have to be undertaken to develop a directing and controlling context for tourism development.

2. Education /Training: The activities listed in this figure outlines the Departments responsibilities for ensuring that adequate training facilities and programs are available.

3. Research and Planning: Outlines the programs to be undertaken to provide the information necessary to implement the strategy, finalize the tourism development proposals and update the strategies, programs, policies and developments to match future requirements.

FIGURE NO.11 - BAFFIN REGION TOURISM DEVELOPMENT STRATEGY

PROGRAM COSTS & PRIORITIES: STRATEGIES & POLICIES, PROGRAMS, ETC.

'ATE SEPTEMBER 1982
SHEET 1 OF 4

xxxxxx Preparation/Plannfw/Fe.3sfbfl ity Studies
• ***+* Review and Modification
++++++ Approval (by Legislature if necessary)
-////// Liaison/Co-ordination/Membership
oooooo ImPlementat40n/Construction
------ Monitoring and Revision

PROJECT YEAR ➤	1	2	3	4	5	6	7	8
FINANCIAL YEAR ▶	1982183	1983184	1984185	1985/86	1986/87	1987/88	1988/89	1989/90
DEPARTMENTAL CONTRIBUTION ▶	150.0	338.0	566.o	556.0	583,0	524.0	514 n	314 n
➤								
NO PROJECT	S W	S W	S W	S W	S W	S W	S W	S W
1. Tourism Information Package for Legislature	5.01 xxxxx	2.0 booooooo						
z. Tourism Information Package for Industry	5.01 lxxxxx	2.0 booooooo						
3. Resource Management & Development Strategy	//////////	//////////	//////////					
4. Tourism Development Strategy for N.W.T.	5.0 0 xxxxxxxxxxx	1.0 1.01 ******●	++++t+ooodooooo					
5. Baffin Region Tourism Development Strategy	10.0 ' 0.0 xxxxxxxxxxx	5.011.01 *• *** +++++	0000000000	---- -----, -				
5. Community Awareness Program (Tourism)	25 0 xxxxx	1.0 5.01 xooooooooo	5.015.0 oooooooooo	5.015.0 oooooooooo				
7. Policies & Guidelines								
a) Ownership/Investment	5.0 xxxxx	1.0 1.0 ******+++++	2.0 oooo -----	------ -----				
b) Facility/Attraction Planning & Development		5.0 xxxxx	1.012.0 *****ooooo	----- ----- --				
c) Accommodations		5.0 xxxxx	. .0 *****ooooo	---- ----- .-				
d) Quality Control			5.0 . xxxxxx•****	.0 ooooo-----	------ -----			
e) Outfitting Services		5.0 xxxxx*****	.0 boooo -----	---- -----				
f) Resource Consumptive Tourism			5.0 1.0 xxxxx•****	2.0 boooo-----	---- -----			
g) Artifact/Historic Resource Protection			5.0 .)(xxxxi*****	.0 booooa-----}	----+---			
h) Technical Assistance		501 ● xxxxxx● ****	.0 boooo -----	----------				
i) Research/Planning		50 0 xxxxx● ****	2.01 booood -----	.----------				
j) Financial Assistance	5.0 xxxxx	1.0 2.0 ******xxxxx	1.0 2.0 ++++++ooooo	2.0 oooooo-----	------			
k) Boating/Water Tourism		5.0 xxxxx	1.01 2.0 •*** ooooo	---- -----	-----			
l) Search & Rescue			5. . xxxxxx*****	.0 booooo-----	------ -			
m) Live-in Agreements		5.0 . xxxxxx*****	.0 booooo-----	------ -				
n) Others			150 xxxxx•***	. .0 o00001----4	----- -			

CAPITAL COSTS (s.000.00)		1	2	3	4	5	6	7	8
	SUB-TOTAL ➤	85.0	71.0	71.0	29.0				
	CUMULATIVE TOTAL ➤	85.0	71.0	71.0	29.0				

PROGRAM COSTS 6 PRIORITIES: **EDUCATION/TRAINING**

DATE SEPTEMBER 1982
SHEET 2 OF 4

xxxxxx Preparation/Planning/Feasibility Studies
****** Review and Modification
++++++ Approval (By Legislature If necessary)
////// LiaisOn/CO-Ordination/Membership
000000 Implementation/Construction
------ Monitoring and Revision

NO	PROJECT YEAR	1		2		3		4		5		6		7		8	
	FINANCIAL YEAR	1982/83		1983/84		1984/85		1985/86		1986/87		1987/88		1988189		1989190	
NO	PROJECT	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W
1.	Action Plan for On-The-Job Training		10.0	3.0	1.0	2.0											
2.	Tourism/Hospitality Advisory Board			15.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
3.	Tourism Industry Program Development Committee			15.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
4.	Training Policies & Curriculum Development				50.0	50.0	50.0	10.0	3.0	25.0							
5.	Course & Teaching Manuals							25.0	25.0	25.0	5.0	10.0					
6.	Design Briefs for Model Tourism Facilities						25.0	25.0									
7.	Construction of Model Facilities						50.0	50.0	100.	100.	00!	1100.	1100.	100.	100.		
8.	Regional Teaching Resource Centre (Tourism Contribution				10.0	10.0	10.0	10.0									
9.	Community Awareness Program (Training)				15.0	5.01	5.0	5.01	5.01	5.0	5.0						
10.	Financial Support Programs (Preparation)					I 5.0	5.01	1.0	3.01	1.013.0							

CAPITAL COSTS ($>000.00)		1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988189	1989190
	SUB-TOTAL	10.0	119.0	187.0	232.0	289.0	230.0	220.0	20.0
	CUMULATIVE TOTAL	95.0	194.0	258.0	261.0	289.0	230.0	220.0	20.0

S 78 KVbr)

PROGRAM COSTS & PRIORITIES: RESEARCH AND PLANNING

'ATE SEPTEMBER 1982
SHEET 3 OF 4

xxxxxx Preparation/Planning/Feasibility Studies

////// Liaison/Co-ordination/Membership

****** Review and Modification

oooooo Implemantation/Construction

++++++ Approval (by Legislature if necessary)

------ Monitoring and Revision

PROJECT YEAR	1		2		3		4		5		6		7		8	
FINANCIAL YEAR	1982/83		1983/84		1984/85		1985/s6		1986/87		1987188		1988/89		1989/90	
NO. PROJECT	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W
1. Resource Inventory Program		10.0	10.0	2.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.(
2. Resource Inventory Process Manual				5.0	2.0	1.0	1.0									
3. Market Research Program •		10.0	10.0	5.0	5.0	50.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.0	25.
4. Marketing /Promotion Research •		10.0	3.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.
5. Infrastructure Design Studies *		10.0	10.0	2.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.
6. Tourism Related Technical Studies •				10.0	2.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.
7. General Feasibility Studies				10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.(

CAPITAL COSTS ($,000.00)		1	2	3	4	5	6	7	8
	SUB-TOTAL	40.0	87.0	180.0	201.0	200.0	200.0	200.0	200.0
	CUMULATIVE TOTAL	135.0	281.0	438.0	462.0	489.0	430.0	420.0	220.0

5-76 KVbr)

• PROGRAM DESIGN ANO IMPLEMENTATION OF SPECIFIC STUDIES.

PROGRAM COSTS & PRIORITIES: MARKETING AND PROMOTION

DATE SEPTEMBER 1982
SHEET 4 OF 4

xxxxxx Preparation/Planning/Feasibility Studies
●-* Review and Modification
~ Approval (by Legislature if necessary)

////// Liaison/Co-ordination/Membership
000000 Implementation/Construction
------ Monitoring and Revision

PROJECT YEAR	1		2		3		4		5		6		7		8	
FINANCIAL YEAR	1982/83		1983/84		1984/85		1985/86		1986187		1987/88		1988/89		1989/90	
NO PROJECT	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W
1. Baffin Region Marketing Promotion Strategy		10.0	5.0	10.0												
2. Liaison Function: H.Q. Region, Tourist Association		5.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
3. Promotional Material for Baffin Region																
a) Travel Agents Manual				5.0	2.0	20.0										
b) Successful Explorer in the Baffin Region				5.0	2.0	10.0										
c) Special Interest Pamphlets (Continual)					15.0	30.0	15.0	30.0	15.0	30.0	15.0	30.0	15.0	30.0	15.0	30.0
d) Package Tours			10.0	20.0	10.0	20.0	10.0	20.0	10.0	20.0	10.0	20.0	10.0	20.0	10.0	20.0
e) Community Developments					5.0	10.0	5.0	10.0	5.0	10.0	5.0	10.0	5.0	10.0	5.0	10.0
etc.																

CAPITAL COSTS ($,000.00)	1	2	3	4	5	6	7	8
SUB-TOTAL	15.0	59.0	128.0	94.0	94.0	94.0	94.0	94.0
CUMULATIVE TOTAL	150.0	338.0	566.0	556.0	583.0	524.0	514.0	314.0

5-78 KVbr)

4. Marketing and Promotion: Describes the activies to be undertaken to maximize the effectiveness of promotion efforts.

The chart outlines for each phase of each activity/project the capital costs incurred by the Department of Economic Development and Tourism in carrying out that particular project. Operations and staffing costs are not included. The total is identified at the top of the first page under Departmental Contribution.

The phasing is based more upon the urgency for putting the required product in place and its degree of dependency upon the actions than available monies. The latter may be variable year by year and the phasing program can be shortened or lengthened accordingly. In addition, many of the activities presently carried out by the Department can be modified to include the activities required to implement the Regional Strategy. The costs identified cannot, therefore, be considered as being in addition to the present budgets.

5.3 Community Development Priorities and Phasing

Community priorities are identified on Figure No. 10. The priorities and costs associated with the development proposals described in community tourism plans for Priority I a I I Areas are outlined in Figure No. 12. These priorities have been established on the basis of:

1. The priority of the Area.

2. The priority of the Community within the Area.

3. The priority of the developments proposed in the Community Tourism Plan.

4. The characteristics and desirability of package tours to link the various communities.

5. Importance of the development for implementing the Regional Tourism Strategy.

The phasing is based upon the assumption that no more than \$200 000 ±20% will be available to the Department in any particular year for capital construction projects. This level is established for small -scale projects. Large-scale infrastructure developments will have to be funded through contributions from the senior level of government.

The non-construction projects have not been inserted into the implementation phasing. These should be undertaken when appropriate and in keeping with the phasing of the programs being implemented under the Regional Tourism Strategy.

Again the total Departmental Contribution towards the total yearly capital costs are identified at the top of Page 1 of Figure No. 12. Departmental Contributions are derived from the cumulative totals less the cost of projects identified by an asterisk. These projects are considered large-scale infrastructure projects financed through grants and agreements with the senior level of government.

FIGURE NO. 12 - BAFFIN REGION TOURISM DEVELOPMENT STRATEGY

TOURISM DEVELOPMENT PROPOSALS: PRIORITY AREA I, COST & PRIORITIES

'ATE SEPTEMBER 1982

SHEET 1 OF 3

xxxxxx Feasibility studies/Engineering Studies

000000 Construction/Implementation

• mH* Planning/Design

////// Liaison

PROJECT YEAR	1		2		3		4		5		6		7		a	
FINANCIAL YEAR	1982/83		1983/84		1984/85		1985/86		1986187		1987/88		1988/89		1989/90	
DEPARTMENTAL CONTRIBUTION	25.0		175.0		272.0		219.0		226.0		161.0		175.0		246.0	
OTHERS	0.0		40.0		270.0		860.0		2,000.0		1746.0		900.0		1,400.0	
NO PROJECT	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W
PRIORITY AREA I																
A) PANGNIRTUNG																
1. Visitor Accommodation/ Services •			10.0 xxxxx	20.0 xxxxx	50.0 xx***	100.0 *****	300.0 ooooo	300.0 ooooo	300.0 ooooo	300.0 ooooo	300.0 ooooo	300.0 ooooo				
2. Airport Facilities Upgrade								5.0 /////	5.0 /////	5.0 /////	5.0 /////	5.0 /////	5.0 /////			
3. Dock/Wharfing Facilities										2.0 /////	2.0 /////	2.0 /////	2.0 /////	5.0 /////		
4. Utility Services			15.0 xxxxx	10.0 xxxxx												
5. Charter Flight Program		10.0 xxxxx														
6. Territorial Park Facilities		5.0 *****	50.0 ooooo													
7. Duval River Int. Hike		1.0 *****	7.0 ooooo													
8. Mt. Duval Scenic Hike		.0 •****	7.0 ooooo													
9. Kolik River Hike		1.0 *****	20.0 ooooo		17.0 ooooo											
10. Aulatsiviktuk Camp				2.0 •	13.0 ooooo	2.0 *****	16.0 ooooo									
11. Kingacojvak Summer Camp				1.0 *****	10.0 ooooo											
12. Arctic Cross-Country Ski Package									3.0 •****	5.0 ****	. • *	ooooo	.0 ooooo			
13. Kingnait Fiord Hike						5.0 •****	3.0 ooooo									
14. Community Host Program		1.0 •****	7.5 ooooo	2.5 ooooo	7.5 ooooo	2.5 ooooo										
B) BROUGHTON ISLAND																
1. Transient Centre Upgrading				10.0 *****	60.0 ooooo											
2. Cumberland Peninsula 8oat Tour						10.0 xxxxx	10.0 x****	20.0 ooooo								
3. Cross-Country Ski Tour							3.0 •****	5.0 ****	10.0 ooooo							
4. Round Island Hike								2.0 *****	23.0 ooooo	6.0 *****	10.0 ooooo					
5. Padle Fiord Fish Camp					10.0 xxxxx	5.0 *****	60.0 ooooo									
CAPITAL COSTS ($,000.00) SUB-TOTAL	19.0		157.0		282.0		751.0		659.0		710.0		62.0			
CUMULATIVE TOTAL	19.0		157.0		282.0		751.0		659.0		710.0		62.0			

6-78 KV br)

• OEPENOENT UPON CAPITAL GRANT FROM SENIOR GOVERNMENTS'.

'IGURE NO. 12 - BAFFIN REGION TOURISM DEVELOPMENT STRATEGY

'OURISM DEVELOPMENT PROPOSALS: PRIORITY AREA I, COST & PRIORITIES

DATE SEPTEMBER 1982

SHEET 2 OF 3

:xxxxx Feasibility Studies/Engineering Studies

000000 Construction/Implementation

'***** Planning/Design

////// Liaison

PROJECT YEAR	1		2		3		4		5		6		7		8	
FINANCIAL YEAR	1982/83		1983/84		1984185		1985/86		1986187		1987108		,1988/89		1989/90	
NO PROJECT	S'	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W
B) BROUGHTON ISLAND (Continued)																
6. Hotel													15.0 xxxxx	409 *****	300.0 00000	300.0 00000
7. Coffee Shop Upgrading						10.0 00000										
8. Polar Bear Hunts								5.0 xxxxx	5.0 xxxxx							
PRIORITY AREA II																
A) FROBISHER BAY																
1. Regional Community Tourism Information •					50.0 xxxxx	50.0 xxxxx	100.0 *****	100.0 *****	400.0 00000	400.0 00000	400.0 00000	400.0 00000	400.0 00000	400.0 00000	200.0 00000	100.0 00000
2. Boat Tour - Foul Inlet		7.0 *****	10.0 00000													
3. Boat Tour - Inner Island				7.0 *****	20.0 00000											
4. Walking Tours		2.0 *****	15.0 00000													
5. Common Arts & Crafts (Interim) (Final)		2.0 *****	25.0 00000											1.0 *****	1.0 00000	
6. Cross-Country Ski					2.0 • ****	10.0 00000										
7. Community Improvement				1.0 p****	5.0 00000											
8. Dew Line Visit •*							8.0 xxxxx	10.0 • ***	50.0	50.0						
9. Wharf/Dock					20.0 xxxxx	20.0 xxxxx										
10. Snowmobile Tour to Lake Harbour				5.0 *****	15.0 00000	15.0 00000										

CAPITAL COSTS (s.000.00)		1	2	3	4	5	6	7	8
	SUB-TOTAL	6.0	58.0	217.0	223.0	905.0	800.0	856.0	901.0
	CUMULATIVE TOTAL	25.0	215.0	499.0	974.0	1564.0	1510.0	918.0	901.0

6-78 KV br)

• Dependent upon capital grant from senior governments.

•* If feasibility study positive.

FIGURE NO. 12 - BAFFIN REGION TOURISM DEVELOPMENT STRATEGY

TOURISM DEVELOPMENT PROPOSALS: PRIORITY AREA 1, COST & PRIORITIES

DATE SEPTEMBER 1982

SHEET 3 OF 3

xxxxxx Feasibility Studies/Engineering Studies

000000 Construction/Implementation

• **** Planning/Design

/ ///// Liaison

PROJECT YEAR ➤	3		4		5		6		7		8		9		10	
FINANCIAL YEAR ➤																
OEPARTMENTMENTAL CONTRIBUTION ➤													?		?	
OTHERS ➤													760.0		900.0	
NO. PROJECT	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W
A) FROBISHER BAY (Continued)																
11. Boat Tour - Frobisher Bay-Cape Dorset•							10.0 xxxxx	10.0 xxxxx					20.0 *****	20.0 *****	250.0 ooooo	250.0 ooooo
B) CAPE DORSET																
1. Art & History Centre•							20.0 xxxxx	20.0 xxxxx	50.0 *****	50.0 *****	250.0 ooooo	250.0 ooooo	250.0 ooooo	250.0 ooooo		
2. Accommodation Services •	10.0 xxxxx	10.0 xxxxx	30.0 *****	30.0 *****	300.0 ooooo	300.0 ooooo	300.0 ooooo									
3. Short Boat Trips		2.0 *****														
4. Full Day Boat Trips		2.0 *****	15.0 ooooo	7 n •****	15.0 ooooo											
5. Overnight Boat Trips				2.0 *****	15.0 ooooo											
6. Walking Tours	15.0 ooooo															
7. Nottingham Island								10.0 xxxxx	10.0 xxxxx	20.0 *****	100.0 ooooo	100.0 ooooo				
C) LAKE HARBOUR																
1. Boat Tours (Day)		2.0 *****	15.0 ooooo													
2. Boat Tours (Overnight)				2.0 *****	30.0 ooooo											
3. Boat Tour (Meek)								2.0 *****	15.0 ooooo	2.0 *****	15.0 ooooo					
4. Hiking Trails		2.0 *****	9.0 ooooo													
5. Visitor Accommodation•										10.0 xxxxx	10 0 xxxxx	*****	20 *****	ooooo	.u, ooooo	200.0 ooooo
6. R.C.M.P. Day-Use Area						7 n • ****	15 n ooooo	10.0 ooooo								

CAPITAL COSTS (S,000.00)		3	4	5	6	7	8	9	10
	SUB-TOTAL ➤	43.0	105.0	662.0	397.0	157.0	745.0	760.0	900.0
	CUMULATIVE TOTAL ➤	542.0	1079.0	2226.0	1907.0	1075.0			

I•78 KVbr)

• DEPENOENT UPON CAPITAL GRANT FRON SENIOR GOVERNMENTS.

APPENDIX I

CALCULATION OF NUMBER OF
TOURISTS TO THE BAFFIN REGION

(1981)

APPENDIX I

CALCULATION OF NUMBER OF TOURISTS - BAFFIN REG1ON - 1981

Deloitte Haskins and Sells Associates (see Appendix II, Page II-25) report . estimated the number of visitors to the Eastern Artic at 9 000 persons and 2 000 for the High Artic. The number of Nordair passengers in 1980 to various points in the Baffin Region were supplied by Nordair as:

	Hall Beach	Nanisivik	Resolute	Frobisher Bay	Total
First Quarter	50	159	277	1 307	1 793
Second Quarter	180	224	658	2 166	3 228
Third Quarter	229	350	979	2 514	4 072
Fourth Quarter	93	143	423	2 084	2 743
	552	876	2 337	8 071	11 836

In talking further to Nordair Officials Mr. Hanz Grosser (Sales Representative Northern Region Nordair) it was estimated that 25% - 30% of this air traffic was tourists. From this discussion and based on related studies (Panignirtung Community Tourism Study and Yukon Tourism Highlights).

Another 25% of the air traffic is accounted for by business visitors. The remaining 45-50% of the air traffic is the result of residents traveling including government and bus ness personnel located in the region.

There are two other flights into the Baffin Region (Eastern Artic and High Artic). These are the Pac fic Western Airlines flight from Yellowknife 1 450 passengers inward in 1981 and the Austin Air flights to Sanikiluaq and Cape Dorset. The Cape Dorset flight has been estimated to have 360 (30 per month) passengers per year; the Sanikiluaq flight is estimated to have 2 400 passengers per year (200 per month.) However, the Sanikiluaq flight also goes to Quebec destination and it is estimated that only 360 passengers per year depart (visit) Sanikiluaq itself.

The total number of air passengers to the Baffin Region is estimated to be 14 006 say 14 000. Applying the same percentage of tourists to the Resolute, Sanikiluaq and Cape Dorset flights as assumed for the Nordair flight (25-30%), there were an estimated 3 500-4 200 tourists to Baffin Region in 1981. In addition, there were an estimated additional 3 500 business visitors to the region. The total of 7 000-7 700 is significantly below Deloitte Haskins & Sells estimate of 11 000.

APPENDIX II

SUMMARY OF RELEVANT BACKGROUND REPORTS

ON

TOURISM INDUSTRY - MARKET CHARACTERISTICS

APPENDIX II

ANALYSIS OF SELECTED BACKGROUND STUDIES AND REPORTS

This appendix contains a synopsis of relevant background studies on tourism in general and in the north in particular.

Study #I: Vacation Travel By Canadians for the Canadian Government Office of Tourism, Travel Data International

This report commissioned annually for Canadian Government Office of Tourism draws some interesting conclusions which have particular relevance to tourism in the Eastern Artic.

Extent of Vacation Travel by Canadians

In both 1980 and 1981 with Canada in a depressed economic climate (particularly in 1981), vacation travel by Canadians continued to remain strong. Vacation travel in 1980 increased 7% over 1979 to reach 8.9 million vacation trips. The number of vacation trips increased marginally in 1981 to 9.0 million vacation trips. Some 55% of Canadian adults took a major vacation trip away from home in 1981. This corresponds to 54% of Canadian adults who took a vacation trip in 1971 indicating that the demand for vacation holidays is relatively insensitive to economic conditions.

While the number of vacation trips has remained steady during the economic downturn, there are some changes in where Canadians vacation which appear to reflect cost consciousness. For example, travel to offshore sun destinations fell sharply while close mainland alternatives i.e., Florida/California registered a gain of Canadian visitors. Foreign travel fell maginally and domestic travel registered a small gain. See Table A.

TABLE A

VACATION TRAVEL BY CANADIANS

Areas Visited	Percentage of Actual Trips (1)			
	1966	1979	1980	1981
Newfoundland/Maritimes	7 (2)	8	8	7
Quebec	18	14	14	14
Ontario	32	22	24	22
Prairies	17 (2)	7	15	16
British Columbia	14	15	14	15
Yukon/N.W.T.	*	1	1	2
Canada at all	N/A	66	67	68
Canada only	69	62	62	64
Non Resident Canadian Province	N/A	33	32	30
Own Province	N/A	39	40	40
U.S. Mainland	25	26	26	25
Offshore U.S. Including Alaska and Hawaii	N/A	16	16	14
Europe	N/A	5	5	6
Caribbean	N/A	3	3	2
Other	N/A	3	3	3

(1) Do not add because of multiple areas visited

(2) Estimated

Seasonality of Vacations by Canadians

Spring and fall travel in both Canada and the U.S. increased in 1980 over 1981, after showing the decrease from 1979 to 1980. See Table B.

TABLE B
SEASONALITY OF TRIPS BY CANADIANS

	1966	1979	1980	1981
Winter	16	19	20	17
Spring	17	20	18	21
Summer	52	41	46	42
Fall	15	20	17	20

While some 21% of Canadians took vacation trips in the spring of 1981, about half (45%) indicated that they would likely take a spring vacation within the next 2 years, and 29% said they were either very likely or extremely likely to take this trip. These estimates of likely spring holiday intent are up significantly from previous year.

Fall vacations were taken by 20% of the Canadian population in 1981. Some 39% of the population indicated that they were likely to take a fall vacation and 25% indicated that they were either very likely or extremely likely to take such a holiday.

Potential Travel Market Comparison of Actual Vacation Patterns to Expressed Potential

In absolute terms, the U.S. had the greatest amount of actual visitors and was second to British Columbia in terms of attraction to potential visitors. See Table C.

If one compares the rate of those who are "interested" in visiting a region to those who indicated that they were "very likely" to visit the region, it demonstrates the extent to which the intent to visit a particular destination may be fulfilled.

TABLE C

FUTURE VACATION PREFERENCES AMONG VACATION TRAVELLERS

1980/81

(Includes Pleasure Trips of 1 + Nights)

	% Visited	% Very Interested in Using In Next Two Years	Ratio	% Very Likely to Visit in Next Two Years	Ratio % Very Likely to Very Intereste
Newfoundland	1	21	21.0	7	3.0
P.E.I.	2	26	13.0	10	2.6
Nova Scotia	3	23	7.6	11	2.1
New Brunswick	3	18	6.0	10	1.8
Quebec	10	28	2.8	23	1.2
Ontario	15	31	2.1	29	1.1
Manitoba	3	12	4.0	8	1.5
Saskatchewan	4	14	3.5	11	1.3
Alberta	8	29	3.6	20	1.5
British Columbia	10	44	4.4	30	1.5
Yukon/N.W.T.	1	21	21.0	5	4.2
U.S.A.	26	42	1.6	33	1.3

While the percentage of Canadian vacationers who have visited the Yukon/NWT is relatively small (1% in the period 1980/81, the same as Newfoundland), some 21% of Canadian vacationers expressed a very strong interest in visiting either the Yukon or the Northwest Territories. The ratio of potential visitors to actual visitors (21) was the highest of any province or area. Newfoundland also had a ratio of 21. See Table C.

Reflecting earlier findings there is something holding the prospective visitor back from actually visiting the Yukon and all territories even though there is strong interest (the ratio of very likely to very interested is the highest, 42%, of any destination). In the case of the territories, it might be cost but proper information and adequate facilities might just as easily be the explanation.

Geographic Differences in Vacation Travel

Within Canada, residents of British Columbia are traditionally more likely to travel than are residents of other provinces. In 1981, 70% of British Columbia residents took a vacation trip, 55% of the residents of Ontario took a vacation holiday. The latter reflects the national average. See Tables D1, D2 and D3.

TABLE D1

INCIDENCE OF VACATION TRAVEL BY CANADIANS

(%)

	1971	1979	1980	1981
Total Adults in Canada (Ave. %)	54	55	56	55
British Columbia	63	64	68	70
Prairies	55	61	61	62
Ontario	57	58	62	55
Quebec	49	47	45	50
Atlantic Province	**49**	**46**	**44**	**43**

Of the travel by residents of the different regions, the Prairie Province and Atlantic Canada residents tend to visit other provinces much more so than residents of any other region. Ontario and B.C. in 1981 have the greatest percentage of vacation trips-to the Yukon/Northwest Territories - 3% each of total trips by residents of those provinces.

The Canadian Travel Survey confirmed other studies which indicated that Ontario generates the largest number of trips (both vacation and business) both within and outside of its own provincial boundary.

TABLE D3

DESTINATION OF RESIDENTS

Province of Origin	Total Person Trips (Vacation & Business) (000's)	Within Own Province (000's)	In Other Parts of Canada (000's)
Total	114 004	95 538	13 290
Newfoundland	2 023	1 809	122
Prince Edward Island	335	164	157
Nova Scotia	4 580	3 798	595
New Brunswick	2 865	2 105	713
Quebec	27 013	23 353	2 418
Ontario	40 523	31 750	3 502
Manitoba	4 970	4 756	1 163
Saskatchewan	6 843	5 466	1 134
Alberta	14 085	10 973	2 413
British Columbia	9 704	8 364	1 073

While Quebec does produce a large number of person trips, a larger percentage of these are within Quebec, so that Alberta produces an almost identical number of out of province trip as does Quebec even though the total number of person trips is only about half that of Quebec's.

TABLE D2

PERCENT OF TOTAL TRIPS

Place of Residence at Time of Trip

	Atlantic Canada			Quebec			Ontario			Prairies			B.C.		
	1979	1980	1981	1979	1980	1981	1979	1980	1981	1979	1980	1981	1979	1980	1981
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Canada	80	89	82	5[illegible]	61	62	5[illegible]	62	61	83	79	78	68	70	74
Atlantic Canada	49	58	49	7	5	5	5	6	6	2	4	1	1	1	1
Quebec	15	14	13	41	41	43	10	8	7	1	3	2	2	2	2
Ontario	24	20	21	[illegible]	12	11	3[illegible]	42	42	10	10	10	6	5	8
Prairies	2	9	6	3	2	2	9	5	6	52	50	49	21	21	21
B.C.	4	5	4	3	4	3	5	4	4	28	25	26	49	49	50
Yukon/ N.W.T.	1	1	2	1	1	1	1	1	3	1	1	1	1	1	3
"Non-Resident" Canadian Province	62	57	57	21	21	20	25	22	20	59	63	52	2	28	29
U.S.	15	17	18	29	31	27	31	28	31	19	19	20	24	25	18

Modes of Vacation Travel

The use of the car for vacation trips has continued to show an overall decline while plane travel has increased despite recent large airline ticket price increases. In 1981 31X of vacation trips by Canadians used airplane travel. Table E.

TABLE E

MAIN MODE OF VACATION TRANSPORTATION BY CANADIANS

	1966	1973	1979	1980	1981
Car	73	64	54	59	55
Plane	10	24	32	30	31
Train	8	3	4	3	4
Bus	7	6	8	6	7
Other	2	3	2	2	3

Package Tour Market

Of the non car (public carrier) vacation trips, 21% (860 000) of these vacation trips included a packaged tour, down slightly from previous years. This represented 9.6% of all vacation trips including, those involving the car as the main mode of transport. Table F.

TABLE F

PROPORTION OF PUBLIC CARRIER TRIPS TAKEN ON PACKAGE TOURS

	1973	1977	1978	1979	1980	1981
Package Tour Trips	340 000	814 000	895 000	870 000	879 000	860 000
% of Total Public Carrier Trips	16	25	24	22	24	21

Of the package tours spending one or more nights in Canada, there has been a dramatic increase in level of activity within the Yukon and Northwest Territories. Although caution is advised due to the relatively small sample sizes, it is estimated that 19% of package tours within Canada visited the Yukon and the Territories: up significantly from 4% in 1979/80.

TABLE G

PACKAGE TOUR TRIPS IN CANADA

Areas Visited	1979/80	1981
Atlantic Canada	11	9
Quebec	19	29
Ontario	29	38
Prairies	36	15
British Columbia	25	10
Yukon/Northwest Territories	4	19
U.S. Mainland	29	12
Offshore	8	3

It is also interesting to note that just 12 percent of tours visited both the U.S. and Canada compared to 29 percent in previous years. The relative weaknesses of the Canadian dollar partially explains this fall off in U.S. package tour business from Canada.

A package tour involves on average 10 nights away from home (down from previous years) with 29% of the package tours occurring in the April - June period and 41% in the July and August summer season. Some 60% of package tours used the services of a travel agent. More than half (53%) of the package tours involved a party size of one or two individuals while at the other extreme 30% of the tours involved a party of 6 or more individuals. See Table H.

TABLE I

PERCENT AMONG VACATION TRIPS USING TRAVEL AGENTS

Areas Visited	1978	1979	1980	1981
Canada	31	33	36	38
U.S. Ma'inland	34	40	34	35
Off shore	46	37	42	32

Reasons for Travel by Canadians

The main reason for travel remains visiting friends or relatives; 48% in 1981. Spending time in a vacation spot has shown dramatic increase as the main reason for travel since 1967 but has not increased significantly over the last 3 years, 29% noted it as the main reason for travel in 1981. Other reasons cited as the main reason for taking vacation holiday included city sightseeing (19% in 1981), rural sightseeing (15%) and fishing, boating and outdoor activities (15%). See Table J.

TABLE J

REASONS FOR TRAVEL

Main Reason For Travel	1978 %	1979 %	1980 %	1981 %
Visit Friends or Relatives	45	48	46	48
Spend Time at Vacation Spot	19	31	29	29
City Sightseeing	11	19	17	19
Rural Sightseeing	9	16	13	15
Fishing, Boating & Other Outdoor Water-Related Activities	12	14	11	15
Camping and Tenting	8	8	7	9
Shopping	5	8	8	10
To Stay at Owned Vacation Property	4	3	3	3
Attend Festivals, Sports etc.	3	6	7	8
Combined Business & Pleasure	5	7	8	9
Other	2	9	8	12

Canadians have not increased the average length of their trips significantly from 1979. In 1981 it averaged 1 160 miles with 28% of the trips beyond 1 500 miles, although only 16% of domestic travel by Canadians involved a trip of 1 500 miles or 'more in 1981, down marginally from 1979/80 (18%).

Accommodation Used During Travel Vacations

Canadians traveling within Canada continue to use private homes (52%) as the main mode of accommodation while on a vacation trip commercial accommodation accounts for about 45% while campsites account for 18%. See Table K.

TABLE K

MODE OF ACCOMMODATION

Type of Accommodation	1979	1980	1981
Private Homes/Friends	18	17	16
Relatives	37	36	36
Commercial Motel	21	17	20
Hotel	14	14	15
Resort/Lodge	4	3	4
Camping/Trailering			
Government Sites	10	10	10
Commercial	7	8	8
Cottages	12	12	14
Other	6	6	6

Socio-Economic Analysis of Vacation Travelers

Historically those with a university education, those between the ages of 30-50, urban residents and white collar workers are the most likely types of individuals to take a holiday. Many of these factors are also related to income trends. See Table L.

TABLE L

PERCENT OF CANADIAN ADULTS TAKING A VACATION TRIP

	1966 %	1971 %	1976 %	1981 %
Place of Residence				
Urban	52	58	59	58
Rural	34	43	43	46
Age				
18-29	44	57	55	55
30-39	49	56	60	62
40-49	46	57	57	58
50+	40	49	53	51
Education				
Public School		39	41	38
High School		56	57	56
Technical		65	63	62
University		70	74	68
Occupation (Head)				
White Collar		66	68	67
Skilled Labour		56	58	56
Farmer		35	36	53
Retired		42	46	46
Other		45	48	46
Sex				
Male		52	55	52
Female		57	57	59

Vacation Traveller Market Segments

The Travel Industry Association of Canada recently completed a study whereby the Canadian traveller was broken down into 4 main market segments:

- Sun Lover
- Security Conscious
- Action Seeker
- Off the Beaten Track

The major descriptions of each of these 4 market segments and their relative size are described below:

Sun Lover (20% of the Vacation Travelers)

- Warm weather holidays particularly seaside destinations.

- Chooses vacation location based on attributes of the spot rather than considering whether it is in Canada or not.

Security Conscious (18% of the Market)

- This group prefers a familiar destination, one visited before especially where there are friends or relatives.

- Strong preference for peace and quiet; usually holidays are taken in Canada and plan their holidays well in advance.

Action Seeker (30% of the Market)

- Preference for big cities or major resorts rather than out of the way or smaller resorts.

- Least likely to be interested in a vacation that involves outdoor recreation.

Off the Beaten Track Type (38% of the Market)

- Strong preference for out of way places and more than others they tend to avoid first class accommodation.

- Outdoor recreational activity is a significant interest and this group is relatively loyal to Canada.

TABLE M

MARKET SEGMENTS - VACATION TRAVELLERS

	Sun Lover	Security Conscious	Action Seeker	Off the Beaten Track
	%	%	%	%
Vacationed in 1980				
Yes	64	53	47	62
Where	100%	100%	100%	100%
Canada	64	80	65	77
Us.	46	25	47	31
Elsewhere	16	9	17	16
Trip Purpose				
VFR	33	67	43	46
Vacation Spot	43	15	29	27
Urban Sightseeing	18	11	23	18
Outdoor Activity	12	6	6	16
Camping	7	5	6	9
Other	24	25	27	25

PERCENT OF ADULTS

	Sun Lover		Security Conscious		Action Seeker		Off the Beaten Track	
	%		%		%		%	
Age								
18-24	25)	37	13)	21	22)	33	19)	36
25-29	12)		8)		11)		17)	
30-39	29)	45	14)	31	13)	29	18)	36
40-49	16)		17)		16)		18)	
59-59	10)	17	17)	47	16)	37	14)	28
60+	17)		30)		21)		14)	
Sex								
Male	55		48		48		50	
Female	45		52		52		50	

PERCENT OF ADULTS

(Continued)

	Sun Lover %	Security Conscious %	Action Seeker %	Off the Beaten Track %
Occupation				
White Collar	41	22	30	37
Skilled Labour	30	28	25	30
Unskilled Labour	12	11	9	7
Farmer	4	5	6	7
Retired	6	18	13	9
Other	8	16	16	10
Education				
Public School	10	35	21	12
High School	49	45	49	50
Technical	17	9	14	17
University	23	10	14	21
Family Income				
Under $10 000	11	24	22	13
$10 000-$14 999	12	18	15	14
$15 000-$19 999	17	21	16	19
$20 000-$24 999	15	12	12	15
$25 000-$29 999	11	7	13	13
$30 000 +	32	16	21	25

Two general types of vacation characteristics "vacation with outdoor activity" and "new unfamiliar destinations" which can be said to apply to a NWT holiday are of varying interest to'different socio-economic categories. See Table N.

TABLE N

PERCENT ADULTS WHO FEEL STRONGLY TOWARD

	Vacation with Outdoor Activity	New Unfamiliar Destinations
	%	%
Age 18-24	55	30
25-29	50	29
30-39	49	26
40-49	43	21
50-59	31	18
60 +	19	12
Family Income		
Less than $10 000	23	18
$10 000 to $14 999	41	27
$15 000 to $19 999	44	21
$20 000 to $24 999	47	27
$25 000 to $29 999	45	21
$30 000 +	50	23

From the above summary, a trip to NWT is more likely to be of interest to younger individuals than the older individuals and to more affluent individuals than to those where income is less.

Study #2: Travel Tourism and Outdoor Recreation 1978 and 1979

Statistics Canada

United States Tourism in Canada

The 1970's witnessed changing trends in travel between Canada and the United States. Up to 1973, there was a steady increase in the number of visitors from both sides of the border. At that time, Canada enjoyed a visitor surplus in 1973. The number of United States visitors to Canada was 6.4 million greater than the number of Canadian visitors to the United States. However, a gasoline shortage situation in the United States in 1974 resulted in a drop in the number of automobile travelers in both directions across the border. Subsequently traffic between Canada and the United States was characterized by two contrasting trends, a growth in the number of Canadian visitors to the United States and a rapid decline in the number of United States visitors to Canada. As a result of these trends, Canada's visitor surplus declined, and since 1976, the year of the United States Bicentennial, there have been fewer United States visitors to Canada than Canadian visitors to the United States. In 1977, the number of Canadian visitors to the United States exceeded the number of United States visitors to Canada by 6.1 million.

However, 1978 seems to have been a turning point in travel between Canada and the United States. The number of Canadian visitors returning from the United States declined from 37.9 million in 1977 to 37.3 million in 1978 and 34.4 million in 1979 - the smallest number recorded since 1975 and a drop of 3.5 million or 9.3% in two years. At the same time, the number of United States visitors to Canada continued to decrease, but at a slower rate. Between 1977 and 1979, the number of United States visitors to Canada declined by 582 000 or 1.8% as compared with a drop of 2 808 000 (8.1%) between 1975 and 1977. These new trends considerably reduced Canada's visitor deficit in 1979 to 3.2 million, compared with 5.7 million in 1978 and 6.1 million in 1977.

The trends observed in 1978 and 1979 were probably the result of several factors tending to make Canada a relatively more attractive destination than the United States for both Canadian and United States residents.

Among the main factors was the lower value of the Canadian dollar, which was priced at about 85 cents American, whereas it was valued close to or above the American dollar between 1975 and 1977; increased gasoline prices throughout North America, especially in the United States in 1979; the fuel supply problems experienced in certain areas of the United States; and the introduction of discount fares and charter flights for air travel within Canada.

The decline in visitors in both directions across the border in 1978 and 1979 was manifested largely by less use of the automobile, still by far the most favoured mode of transportation in North America, even for long distance travel. Increased gasoline costs, coupled with travelers' apprehensions of difficulties in obtaining fuel far from home, inevitably dissuaded a certain number of Canadians and Americans from taking long automobile trips. There is some indication that some travelers, who in earlier years used automobiles, decided to travel by air in 1978 and 1979.

U.S. visitors coming to Canada have decreased from 13.5 million in 1973 to 10.9 million in 1979. Airplane travel has been an increasing mode of transportation but still trails automobile travel by a margin of almost 5.1. Just over 25% of the visitors come to Canada April - June quarter and 50% come during the July - September quarter. Ontario continues to receive almost 50% of the U.S. visitors; British Columbia has increased its share of the U.S. visitor market 12.1% in 1973 to 15.2% in 1979. The Yukon/NWT have also shown a dramatic rise in percentage of visitation 0.4% in 1973 to 1.1% in 1979.

Half of the tourists visiting Canada from the U.S. come from the heavily populated_ Mid Atlantic (New York, New Jersey and Pennyslvania) and East North Central (Wisconsin, Michigan, Ohio, Indiana and Illinois); New England, the Pacific coast states and the West North Central states (Minnesota, North and South Dakota, Nebraska, Iowa, Kansas and Missouri) also are well represented by tourists in Canada. See Table O.

Overseas Visitors

In 1978 and 1979, the number of overseas visitors to Canada increased dramatically. In 1979, for the first time, their number exceeded two million, representing an increase of 17.5% over 1978 and 41.4% since 1977. The 1979 increase was the largest recorded in the 70's, surpassing even that of 1976 (18.8%) when the city of Montreal hosted the Olympic Games. The increases in the number of overseas visitors to Canada in 1978 and 1979 could be " argely attributed to the decline in the price of the Canadian dollar in terms of many foreign currencies and lower levels of price increases in Canada. This helped to make this country one of the least expensive and hence more attractive international destinations for residents of countries such as the Federal Republic of Germany, Japan and Switzerland.

The four leading countries of origin of overseas visitors to Canada were unchanged between 1973 and 1979: the United Kingdom, the Federal Republic of Germany, Japan and France. Almost all overseas countries sent an increased number of visitors to Canada in 1979. Between 1973 and 1979, the largest increases were recorded by Israel (283%), India (164%), Sweden (127%), Japan (116%) and Australia (116%). Relative to their total populations, the overseas countries which provide the largest proportions of visitors to Canada were Israel (13.3 per 1 000 population), Jamaica (12. 0), the United Kingdom (9. 2), Switzerland (7. 9) and Netherlands (7. 3).

TABLE O

TRAVEL CHARACTERISTICS OF U.S. VISITORS TO CANADA

	1973	1974	1975	1976	1977	1978	1979
Thousands	13 523	12 735	12 499	11 658	11 451	11 277	10 909
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Mode of Transportation							
Automobile	82.6	79.9	80.1	79.0	77.7	76.9	71.2
Plane	9.6	11.5	11.3	11.8	13.0	13.6	15.5
Bus	5.8	6.3	6.1	6.3	6.5	6.7	7.3
Rail	0.4	0.7	0.7	0.9	1.0	0.9	0.9
Boat	1.6	1.6	1.8	2.0	1.8	1.9	1.9
Other Methods	-			-	-		3.2
Season							
First Quarter	8.6	8.7	9.3	9.1	8.5	9.3	9.0
Second Quarter	25.0	24.9	25.2	25.1	25.8	25.1	26.6
Third Quarter	52.7	52.5	51.8	52.3	51.9	51.5	49.3
Fourth Quarter	13.7	13.9	13.7	13.5	13.8	14.1	15.1
Region of Residence							
New England - (Connecticut) Rhode Island Main, Vermont New Hampshire Massachusetts)	13.1	1.9	13.0	12.1	13.1	12.1	11.8
Middle Atlantic - New Jersey New York Pennsylvania	26.4	28.5	25.7	24.6	23.2	27.1	25.2
South Atlantic	4.7	5.2	4.5	4.6	5.8	6.1	6.°

TABLE O

(Continued)

CHARACTERISTICS OF U.S. VISITORS TO CANADA

	1973	1974	1975	1976	1977	1978	1979
East North Central - (Wisconsin, Michigan, Ohio, Indiana, Illinois)	27.[illegible]	26.0	27.5	26.5	28.5	24.6	25.4
West North Central - (Minnesota, North Dakota, South Dakota, Nebraska, Iowa, Kansas, Missouri)	8.7	8.3	9.4	12.1	10.1	10.1	9.8
East South Central	0.[illegible]	0.[illegible]	0.9	1.[illegible]	0.8	1.1	1.3
West South Central	1.3	1.4	1.3	1.4	1.2	1.7	1.6
Mountain	3.2	3.7	3.1	3.1	3.4	2.7	3.2
Pacific - (Washington, Oregon, California)	13.2	13.9	14.1	13.7	13.0	13.9	15.2
Other Remaining States	0.7	0.5	0.5	0.8	0.8	0.6	0.5
Not Stated			-	0.1	0.1	0.1	0.1
Province of Visit							
Atlantic Provinces	7.1	6.4	5.6	6.8	7.7	7.0	-
Quebec	19.0	19.9	10.9	17.2	16.5	16.7	-
Ontario	51.0	50.6	54.6	50.0	48.0	49.2	-
Manitoba	4.1	3.2	3.8	4.9	4.7	4.2	-
Saskatchewan	1.1	0.9	0.9	2.1	2.1	1.3	-
Alberta	5.0	6.3	4.3	4.4	6.2	5.1	-
British Columbia	12.1	12.5	13.7	13.6	13.6	15.2	-
Yukon and Northwest Territories	0.4	0.3	0.3	1.1	1.1	1.1	-

Source: Canadian Travel Survey

TABLE P

VISITORS FROM OVERSEAS COUNTRIES, 1973-1979

Country of Residence	Visitors							Population 1977
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
	thousands							
All countries - Total	1 105	1 219	1 328	1 577	1 425	1 674	2 011	3 883 903
United Kingdom	342	347	380	408	372	436	516	55 852
Germany (Federal Republic)	121	131	138	169	158	186	235	61 396
Japan	71	78	90	107	98	128	159	113 863
France	74	78	83	110	91	108	128	53 709
Netherlands	57	62	65	72	71	85	101	13 853
Australia	31	40	42	57	51	59	67	14 074
Italy	46	46	45	58	47	54	61	56 446
Switzerland	21	26	28	36	35	41	50	6 327
Israel	12	20	21	22	24	31	46	3 465
Mexico	23	27	35	36	26	35	41	64 594
India	14	18	22	31	22	28	37	625 818
Sweden	15	18	20	26	24	28	34	8 255
Belgium	16	17	16	21	19	21	26	9 830
Jamaica	17	22	25	28	22	22	25	2 080
Hong Kong	14	17	21	23	21	20	24	4 514
Trinidad and Tobago	13	15	17	19	17	20	24	4 514
Others	213	260	283	358	327	371	437	2 790 457

TABLE P
(Continued)

VISITORS FROM OVERSEAS COUNTRIES, 1973-1979

Country of Residence	Visitors 1973	1974	1975	1976	1977	1978	1979	Population 1977
	percent							1979 visits per '000' population
All countries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	0.5
United Kingdom	31.0	28.5	28.6	25.9	26.1	26.0	25.7	9.2
Germany (Federal Repub ic)	11.0	10.8	10.4	10.7	11.1	11.1	11.7	3.8
Japan	6.4	6.5	6.8	6.8	6.9	7.6	7.9	1.4
France	6.7	6.5	6.2	7.0	6.4	6.5	6.4	2.4
Netherlands	5.2	5.1	5.4	4.6	5.0	5.1	5.0	7.3
Australia	2.8	3.3	3.2	3.6	3.6	3.5	3.3	4.8
Italy	4.2	3.8	3.4	3.7	3.3	3.2	3.0	1.1
Switzerland	1.9	2.2	2.1	2.3	2.5	2.4	2.5	7.9
Israel	1.1	1.7	1.6	1.4	1.7	1.9	2.3	13.3
Mexico	2.1	2.2	2.6	2.3	1.8	2.1	2.0	0.6
India	1.3	1.5	1.7	2.0	1.5	1.7	1.8	0.1
Sweden	1.4	1.5	1.5	1.6	1.7	1.7	1.7	4.1
Belgium	1.4	1.4	1.2	1.3	1.3	1.3	1.3	2.6
Jamaica	1.5	1.8	1.9	1.8	1.5	1.3	1.2	12.0
Hong Kong	1.3	1.4	1.7	1.5	1.5	1.2	1.2	5.3
Trinidad and Tobago	1.2	1.2	1.4	1.2	1.2	1.2	1.2	-
Others	19.3	21.5	21.3	22.7	23.0	22.2	21.7	0.2

In proportion to the total number of overseas visitors that they received, Saskatchewan and Manitoba in 1979 received the largest number of visitors from the United Kingdom (45% and 39%, respectively). British Columbia and Alberta recorded the largest proportion of visitors from France (19%) and Alberta had the highest proportion from the Federal Republic of Germany (15%). See Table Q.

The time of travel by overseas visitors closely parallels that of U.S. visitors. Approximately half of the overseas visitors come to Canada in the third quarter July - September while one quarter of the visitors come to Canada during the second quarter April - June. This trend has increased only marginally since 1973.

Toronto is the most popular inbound Canadian City, at least as far as charter flights are concerned. Some 57% of overseas charter passengers come into Canada via Toronto; Vancouver registered 18% and Montreal 10%.

Air is virtually the only mode of transportation available to Canadians traveling overseas, 98.5% went by air in 1979. However, many overseas visitors enter Canada via the United States. The proportion of overseas visitors entering Canada by land via the United States has been increasing (35.4% of all overseas visitors to Canada in 1979 up from 34.1% in 1978 and 30.7% in 1977). Of all categories of overseas visitors to Canada, the one showing the most significant increase was that of entering and leaving the same day by land via the United States, which rose 68.0% between 1977 and 1979 to 304 000. About one overseas visitor in seven fell into this category in 1979. See Table R.

TABLE Q

Province of Visit	Visits	%	United Kingdom	Germany (Federal Republic)	France	Other Europe	Total Europe	Asia	Other
Canada									
1979	2 330	100	26	11	7	20	64	17	19
1978	1 930	100	25	10	6	21	63	17	20
1977	1 610	100	25	10	7	21	63	16	21
1976	1 359	100	27	10	7	23	67	15	18
1975	1 164	100	30	9	6	22	67	14	19
1974	1 068	100	30	10	6	23	69	13	18
1973	930	100	33	10	7	22	71	11	18
Atlantic Provinces									
1979	93	100	36	8	7	10	62	9	29
1978	68	100	43	4	5	13	65	12	23
1977	60	100	33	12	7	17	69	6	25
1976	57	100	45	8	3	16	72	7	21
1975	52	100	55	5	4	17	82	7	10
1974	44	100	38	7	5	24	74	3	18
1973	31	100	36	12	5	27	81	6	13
Quebec									
1979	469	100	13	8	19	25	66	14	21
1978	403	100	24	7	18	27	66	15	10
1977	314	100	13	8	19	27	67	12	21
1976	444	100	17	8	16	28	69	13	18
1975	250	100	15	7	21	23	66	15	19
1974	251	100	15	8	20	24	68	12	20
1973	232	100	20	7	19	25	71	10	19

TABLE Q

(Continued)

AREA OF RESIDENCE

Province of visit and year	Visits		United Kingdom	Germany (Federal Republic)	France	Other Europe	Total Europe	Asia	Ott
Ontario									
1979	,1 043	100	29	11	4	21	66	15	[illegible]
1978	887	100	30	11	4	22	67	14	[illegible]
1977	819	100	31	11	4	22	68	14	[illegible]
1976	565	100	33	10	3	21	67	13	[illegible]
1975	563	100	35	9	2	22	68	11	[illegible]
1974	519	100	37	8	2	23	70	11	[illegible]
1973	462	100	41	9	2	21	73	8	[illegible]
Manitoba									
1979	67	100	39	13	3	19	74	10	[illegible]
1978	43	100	30	21	2	18	71	11	[illegible]
1977	38	100	27	19	4	22	72	10	[illegible]
1976	19	100	48	7	5	21	81	9	[illegible]
1975	27	100	44	12	2	23	81	6	[illegible]
1974	19	100	41	13	3	18	75	5	[illegible]
1973	13	100	37	11	3	22	73	13	[illegible]
Saskatchewan									
1979	31	100	45	8	4	21	78	9	[illegible]
1978	20	100	34	13	2	17	66	15	[illegible]
1977	22	100	29	18	2	20	69	15	[illegible]
1976	10	100	45	8	3	19	75	1	[illegible]
1975	10	100	47	5	5	21	78	10	[illegible]
1974	9	100	49	11	2	23	85	4	[illegible]
1973	7	100	46	11	2	22	81	8	[illegible]

TABLE Q

Continued)

AREA OF RESIDENCE

Province of visit and year	Visits		United Kingdom	Germany (Federal Republic)	France	Other Europe	Total Europe	Asia	Othe
Alberta									
1979	224	100	28	15	2	17	63	22	16
1978	167	100	26	13	2	18	59	22	19
1977	129	100	22	14	3	20	59	22	19
1976	87	100	22	20	3	17	62	12	26
1974	59	100	29	19	4	21	72	9	19
1973	37	100	37	14	4	24	79	8	13
British Columbia, Yukon & N.W.T									
1979	414	100	26	12	2	15	55	27	19
1979	341	100	22	11	2	15	50	30	20
1977	229	100	24	9	2	15	50	31	19
1976	154	100	28	9	1	17	55	30	15
1975	160	100	27	8	2	21	58	26	16
1974	142	100	26	12	1	21	59	35	16
1973	131	100	26	12	1	19	58	25	17

TABLE R

PERCENTAGE DISTRIBUTION OF OVERSEAS RESIDENTS ENTERING CANADA BY MODE OF TRANSPORTATION

1973-1979

Mode of Transportation	1973	1974	1975	1976	1977	1978	1979
Total:							
Thousands	1 105	1 219	1 328	1 577	1 425	1 674	2 011
Percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Air	percent						
Entering Direct	51.2	52.2	51.5	48.9	50.4	47.4	46.3
Entering via the United States	14.9	17.4	17.2	17.6	18.4	18.1	17.9
Total	66.1	69.7	68.7	66.5	68.8	65.5	64.1
Land (via the United States							
Same Day	15.7	12.4	12.4	13.9	12.7	14.1	15.1
One or more nights	17.3	17.2	18.3	19.1	18.0	20.0	20.3
Total	33.1	29.7	30.7	33.0	30.7	34.1	35.4
Marine							
Entering Direct	0.6	0.6	0.4	0.3	0.3	0.3	0.2
Entering via the United States	0.2	0.1	0.2	0.2	0.2	0.1	0.2
Total	0.8	0.7	0.6	0.5	0.5	0.4	0.4

For all of the territories, the estimated distribution of visitor expenditures by business/pleasure and summer/winter is quite significant. Almost three quarters of the pleasure visitors visit the territories in the summer period, while the business travelers do most of their visiting on the non-summer months. Overall about 2/3 of the visitors are in the territories during the summer period.

The results of the origin of visitors to the territories appears to suggest that the Western Arctic was oversampled. Some 65% of all visitors were from Canada (45% from Western Canada), 27% from the U.S. and 8% overseas (5% from Germany).

Origin of Visitors

	%	
Alberta	27	
Other Western Canada	18	
Ontario	14	
Quebec	3	
Other Eastern Canada	2	65% Canada
U.S. West Coast	6	
Other Western U.S.	8	
Eastern U.S.	11	
Southern U.S.	2	27% U.S.
Germany	5	
Other International	3	8% International
TOTAL		100%

The activities that visitors participated in while in the NWT was varied although over half of the visitors participated in each of; shopping for crafts, camping, and fishing.

Activity	%
Business	25
Visit Friends/Relatives	27
Shopping for Crafts	53
Festivals, Local Events	8
Museum, Historic Sites	41
Nature Study	34
Hiking, Backpacking	20
Camping	51
Fishing	51
Hunting	2
Swimming	17
Canoeing	10
Power Boating	7
Other	12

Note: In this question, multiple responses were possible. Percentages indicate the level of participation in a particular activity.

The average number of nights spent in the NWT was 12.8.

Somewhat surprisingly, business or personal interest prompted most people to visit the territories. The influence of friends or residents of NWT was relatively minor.

Promoted By	%
NWT Resident	12
Friend Visited	6
Travel Agent	*
Article, Advertisement	9
Business	23
Personal Interest	28
Travel Brochures	5
Previous Visit	8
Other	9
TOTAL	100%

The household incomes of the visitors averaged $31 000, suggested that visitors to the territories were relatively affluent.

Household Annual Income

income	%
Under $10 000	8
$10 000-$19 000	19
$20 000-$29 000	27
$30 000-$39 000	18
$40 000-$49 000	10
$50 000 or more	18
TOTAL	100%
Average	$31 000

While other NWT visitor profile data was collected the information is sketching about visitors to the Eastern Arctic.

Study #4: Yukon Tourism Industry Highlights 1981

Tourism Planning and Development Branch April/1982

The year 1981 was an excellent year for the Yukon tourism industry. An all time high number of tourists (387 000) visited the Yukon in 1981. This **represented a 14% increase over 1980 and represented a reversal of the** decline recorded in 1980.

NUMBER OF VISITORS TO THE YUKON

1975	1976	1977	1978	1979	1980	1981
318 000	307 000	300 000	363 000	362 000	340 000	387 000

Mode of Travel

	1975	1976	1977	1978	1979	1980	1981
Highway	69%	65%	61%	67%	69%	68%	71%
Air	19%	21%	23%	22%	22%	27%	24%
Other	12%	14%	16%	11%	9%	5%	5%

While the proportion of air travelers to the Yukon decreased in 1981 over 1980, very little change occurred in overall volume.

Some 59%-of **all travelers visit the Yukon in the July - September quarter with the second quarter (April - January) providing 26% of the total number of tourists.** The January - March quarter and October - December quarter provide 7% and 8% respectively. One startling result was that this seasonal distribution was found to be true for all modes of travel except for tourists arriving by air where the visitors were much more evenly distributed throughout the four quarters:

Seasonality of Air Visitors to Yukon

First Quarter	21.%
Second Quarter	26%
Third Quarter	36%
Fourth Quarter	18%

The Visitor Information Centre Surveys found that Canadian visitors to the Yukon have steadily been increasing their share of total visitor traffic to the Yukon rising from 20% of total visitors in 1975 to 28% in 1981. In contrast, U.S. originating visitor traffic have been dropping in their share of total traffic, 77% in 1975 to 63% in 1981. The most remarkable gains have been in traffic from overseas which has tripled its share of total visitor traffic from 3% in 1975 to 9% in 1981.

Origin of Visitors

Percentage share from Yukon Visitor Information Centres Survey

	1975	1981
Canada	20%	28%
Us.	77%	63%
Other	3%	9%

This pattern varies significantly depending on the Visitor Centre. For example Haines Junction and Beaver Creek are dominated by U.S. visitors 82+% and Canadian tourists accounting for only 12-13%. In contrast to this. at Dawson City and Whitehorse the traffic is much more balanced with the overseas 'traffic accounting for 12-13% of the total number of visitors and the remaining 88% or so split fairly evenly between Canadian and U.S. visitors.

Of the Canadian visitors to the Yukon, some 75% come from west of the Ontario/Manitoba border.

% SHARE OF CANADIAN VISITORS 1981

(Yukon Visitor Information **Centre)**

	%
British Columbia	28
Alberta	27
Saskatchewan/Manitoba	14
Ontario	20
Quebec	3
Atlantic Canada	2
NWT	2
Yukon	5
	100%

The share of total visitation by Canadians from Ontario to the Yukon now stands at 20%, down from 23% share of 1978. Visitation from east of Ontario has remained steady over the past four years, accounting for about 5% of all visitation by Canadians in each year.

Of **the U.S. visitors, the** Pacific **States provide 26% of Yukon visitation from the U.S.**

	% Share of U.S. Visitors
Pacific	26%
East North Central	15%
West North Central	10%
South Atlantic	10%
Mountain Region	9%
West South Central	9%
Alaska	8%
Mid Atlantic	7%
East South Central	3%
New England	3%
	100%

Of the overseas visitors, Germany followed by Switzerland and Australia account for the majority of visitors.

	% Share of Visitors From Overseas
Germany	43%
Switzerland	13%
Australia	12%
United Kingdom	7%
Netherlands	4%
France	3%
New Zealand	3%
Sweden	2%
Austria	2%
Japan	1%
Other	10%

These proportions have been relatively constant over the period 1978-1981.

Study #5: The Travel Industry in the Northwest Territories 1975

Department of Economic Development, Division of Tourism, G.N.W.T.

This report, which was the eighth of its kind, makes an attempt to quantify the demand, supply and impact resulting from travel trade (aggregate demand, from residents and non-residents, persons traveling on business and pleasure) in all of the Northwest Territories. Caution is advised in the use of the study because of possible inadequacies in respect to coverage and accuracy of the data. The study identifies the District of Mackenzie as the principal travel/tourist region. The highlights of the report include the following:

- The number of non-resident leisure travelers entering the Territories in 1975 by highway was 11 900, some 3.9% fewer than in 1974 (Mackenzie Highway).

- 74 500 air travelers entered the Territories in 1975, of which 9 200 (12.4%) were tourists. The total number of air travelers was estimated to be 3% fewer than in 1974. Edmonton, Winnipeg, and Montreal were the principal air gateways; Edmonton was the single most important, dispatching nearly 80% of the total. The decline in air traffic to the NWT in 1975 was attributed to the low levels of oil and gas exploration and development in the Mackenzie Delta/High Artic Islands in 1975.

  Nordair, which serves the eastern Arctic through Montreal, reported increased air travelers in 1975, 8 300 or 11.2% of the total 74 500 NWT air travelers, up significantly from 1974 and 1973.

  Nordair initiated direct jet service to Hall Beach and Strathcona Sound in 1975. This new service contributed to traffic increases in the Eastern Arctic.

- Accommodation surveys were conducted for lodges, hotels and motels, outfitters, and park and campground areas but were not segregated by geographical area so that visitor data could be somewhat misleading if applied to the Baffin Region.

The lodge survey, with 25 respondents, indicated that of the nearly 3 500 guests 79.2% were from the United States, 3.9% NWT residents, 16.4% from the rest of Canada and 0.5% from Overseas (Europe). Brochures, magazines, sports shows and newspapers in descending order were the most popular methods of promotion. The number of registered guests was estimated to have decreased by almost 19% from 1974 (based on a comparison of the lodges reporting in both years).

The hotel and motel survey, with 26 respondents, contrasted sharply with the lodge survey in several areas. Firstly, the distribution of the 160 000 guests was predominately Canadian - 30% NWT residents, 60% residents of other parts of Canada; 7.5% were from the USA and 2.5% from overseas. Secondly, the number of guests in 1975 was estimated to have increased by over 30% from 1974. Most of the guests (83.2%) were traveling for business reasons.

The outfitters survey, with 10 respondents and a small guest sample of 230, indicated that 43.0% were from the USA, 33.5% from NWT, 22.% from the rest of Canada and 1.3% from overseas.

The park and campground survey only included data for public campgrounds in the Yellowknife area and is therefore of little benefit to this study.

Inclusive tour operators were also surveyed. Of the 13 respondents in 1975, they noted that they had 1 512 guests on 106 tours. Only 15 tours (110 people) were in the Eastern Arctic. The total number of tour guests has fluctuated around the 1 500 person mark since 1972.

The study concludes that better information and promotion of the Territories is necessary before increased tourism can be expected.

Study #6: Tourism Development and Marketing Strategies for the Northwest Territories

Intrec Group Ltd., Outcrop Ltd., Qaivvik Ltd., May, 1980.

This report notes that current tourist appeal of the NWT is very limited with business travelers representing 80% of the market. The pleasure market is restricted primarily to visiting friends and relatives, festivals, and package tour visitors. Only a very small percentage of visitors participate in outdoor activities such as hunting, canoeing, or climbing. This report also states that the western area of the Territories receives the largest number of visitors with the Baffin Area accounting for only 10% of the visitors. The western Arctic is, however, the area to experience the greatest growth in tourism.

The "rifle approach" to marketing is suggested and marketing efforts should be directed to those activities/experiences unique to the NWT. Promotion should be addressed to special interest groups, clubs, and agencies. Packaging should be the major marketing approach and all marketing activity should incorporate the Six Arctics. In the short term, the report states that priority should be given to experiences which can be offered in the non-summer months.

The types of specialized markets to which the NWT should have appeal include rock hounds, mountain climbers, photography buffs, bird watchers, biology clubs, arts and crafts guilds, canoeists, cultural groups.

The report notes that Pangnirtung is the largest tourism centre in the Baffin Area because of its proximity to Auyuittuq National Park. Other communities, such as Pond Inlet and Arctic Bay, could develop as activity nodes similar to Pangnirtung. A large percentage of visitors go to Fret isher Bay on midnight tours while other major market groups are hikers and climbers to the National Park. The greatest number of non-resident vis tors are traveling in the zone on business.

The report notes that the total number of visitors to the NWT increased by only 5% over the 1970 figure (although expenditures increased by 100%). In 1975, the 21 000 tourists spent $10.8 million. No complete statistics exist for the years following 1975 but indications are that a 10% increase

Study #7: Northwest Territories Tourism Plan

K.W. Lawrence, Department of Economic Development and Tourism GNWT, March, 1978.

This report is a strategy paper to promote tourism in the NWT in the short term and to devise a longer term rational plan for development of tourism in the area as a full-fledged industry.

The report. recommends that, based on existing statistics, initial consideration should be given to the following markets in descending order of priority:

- Alberta, British Columbia and Yukon
- Saskatchewan and Manitoba
- Ontario
- USA and Great Lakes States

The report notes the following difficulties or opportunities for tourism in the NWT.

- high construction and operating costs;
- static markets for hunting and fishing lodges due to changes in market preferences and the limited nature of trophy resources;
- increased demand for wilderness travel; and
- low growth or static markets for business travel and an increased demand for leisure travel.

(actually 5%, see following table) in pleasure travelers was realized between 1975 and 1978 and that air travel continued to increase as did the number of Canadian travelers as a -percentage of total tourists - see following table:

TRENDS IN PLEASURE TRAVELLER VISITATION TO THE NWT

	1969	1970	1975	1978
MODES OF TRAVEL				
Road	6 300 (52%)	12 000 (60%)	11 900 (56%)	8700 (40%)
Air	5 800 (48%)	8000 (40%)	9 300 (44%)	13 300 (60%)
TOTAL	12 100	20 000	21 100	22 100
ORIGIN				
Canada	5 600 (46.3%)	12 200 (6X%)	13 000 (62%)	14 000 (64%)
USA	6 400 (53.2%)	7 600 (38%)	7 450 (35%)	7 400 (33%)
Other	- (.5%)	200 (19%)	650 (3%)	700 (3%)
REASON FOR VISIT				
Fishing Lodge	4 000	4 000	4 800	5 500
Package Tour	n/a	n/a	1 500	3 500

NOTE: These figures exclude business travelers.

In 1978, it is estimated that 80 000 people travel led to and within the NWT for business and that this market group grew steadily from 1975, except for 1976.

Visitor characteristics of tourists to the NWT are presented in the report including origin, accommodation used, purpose of the trip, etc. However, as much of the information is aggregated for all of the NWT, it is of limited benefit for the Baffin Area study since the majority of travelers visited the western portion of the Territory. (We are given to understand from tour wholesalers that this is the result of travel cost to the eastern portion of the Territories.)

Study #8: Survey of Sport Fishing Lodges in the NWT

Department of Fisheries and Oceans, Western Region, 1981.

No fishing lodges in the Baffin Region were surveyed in the report which provides visitor profiles and financial and operating data on the lodges and fishing resource data.

In addition, employment and other economic impacts resulting from the fishing lodge industry are described. The report is useful in a general way for estimating the cost/benefit of tourism in the Territories; aspects of it could be applied to future tourism projects in the Baffin Area.

Study #9 Pangnirtung Visitor Survey

Pangnirtung Tourism Study, 1981, Marshall Mackl in' Monaghan Limited.

The Pangnirtung Visitor Survey was designed to define perceived issues and concerns of existing travelers to Pangnirtung and the surrounding areas. , The questionnaire was randomly administered to travelers leaving Pangnirtung from May - October 1981 by flight attendants of Bradley-First Air during the flight from Pangnirtung to Frobisher Bay. Specifically, the questions were designed to provide information on:

0 trip characteristics
0 source and adequacy of pre-trip information
0 accommodation preferences
0 activity preferences
0 visitor expectations and reactions

A total of 205 responses were received and tabulated. The detailed results are presented in the report. Key findings are summarized below:

0 The largest percentage of visitors were from Ontario (25.8%) followed closely by NWT (21.9%) and USA (19.5%). The European market represents 11.7% of visitations, 9.2% from Western Canada and no visitors from Atlantic Canada.

0 The great majority of visitors travelled with friends (27.0%), followed closely by those who travel led as a special interest group or club (24.0%). Only 6.1% of visitors travel led as part of a commercial tour and most of these were Europeans.

0 Over 29% of visitors travel led to Pangnirtung for purposes other than vacation - 22% for business and 7.4% to visit relatives/friends.

0 Pre-trip information was obtained from a variety of sources. No one source was dominant, - 22.2% obtained information from friends and relatives, 17.4% from travel agents/tour groups and 13.5% from Parks Canada.

- Of the activities participated in, photography (71.3%), sightseeing (64.9%), and hiking (61.2%) were dominant activities.

- Future activity preferences were also surveyed and fishing (27.5%), hiking and trip to the Park (19.4% each) and boat tour of the Sound (18.4%) were the most commonly mentioned activities.

- General satisfaction with the trip was noted in all categories including accommodation, food, transportation, etc.

- Of the aspects of the trip most disliked, bad weather (86.9%) and litter/honey bags (85.9%) were by far the most common.

As part of the Marshall Macklin Monaghan study, interviews/questionnaires of tour operators and special interest groups were undertaken and historical visitor data from Auyuittuq National Park and data from First Air for 1980/81 March were reviewed. The data indicated that most of the visitors to the park come from Canada (50-70%), with USA visitors second (15-30%). Visitation to the Park has decreased from 511 in 1978 to 327 people in 1980 and the average length of stay has decreased from over 17 days to just over 10 days.

Tour wholesalers indicated that generally there are two types of visitors in Pangnirtung, those who come on an eastern Arctic trip of which Pangnirtung is one stop and those who come primarily to visit Auyuittiq National Park. A third group which travels to the eastern Arctic are the char fishermen, predominantly Americans from the eastern USA.

Study #10: Northwest Territories Economic Development and Tourism - Five Year Marketing Strategy

Five Year Marketing Strategy for Government Programs, January 1982.

This report contains a significant compendium of information on marketing programs, costs and strategies.

Although the data refers to the Northwest Territories as a whole; the data pertaining specifically to the Baffin Region reflect the following)[1]

- 20% of the total traffic comes from Ontario (mainly large urban centres). This traffic is interested in the following:
  - cultural package
  - outdoor recreation
  - outdoor experience

  Although Ontario traffic disperses throughout the Territories, it concentrates on the Baffin and Keewatin zones. There seems to be some growth potential in this market segment because it experiences good support from operators and the media. Because of the distances involved, this market is particularly good for packaged tours.

- 5% of the traffic to the Territories comes from West Germany, primarily for the following:
  - cultural encounters
  - outdoor recreation
  - outdoor experience

  This is perceived to be a high income market but has high associated cost for promotion.

1) Tables detailing the information have been presented previously in this Appendix.

In general, therefore, the perceived market for the Baffin Region is very limited and restricted to the following:

0	Ontario	package tours fishing package outfitter trips
0	Quebec and Special Interests -	climbing hiking package tours fishing camps
0	West Germany	package tours hunting fishing lodges outfitters

It appears to be that the Non-Ontario Canadian resident market is highly influenced by the National Park in the Baffin Region.

Notwithstanding the above, it should be recognized that the appeal of the Baffin Region is still significantly less broad than that for the other regions of the Northwest Territories. Although this could be the result of available facilities, it is noted that transportation costs for the area are very high.

APPENDIX III

TOURISM INDUSTRY'S ATTITUDES AND REACTIONS
TO
PROPOSED TOURISM PROJECTS IN THE BAFFIN REGION

GENERAL ATTITUDES TO TRAVEL ON BAFFIN ISLAND

Proposed tours and tourist activities will, of necessity, need to be organized through tour wholesalers or special interest groups. In order to provide a framework for the development of scenarios and to develop a comprehensive background on tourists' perceptions of travel/tourism in the eastern Arctic, a number of the major tour wholesalers currently operating in the area were contacted.

The following airlines, tour operators and government agencies have been contacted:

1. Canada North Outfitting Inc.
2. Canadian Nature Tours
3. Goliger's Tours
4. Viking Tours
5. Special Interestours
6. Great Canadian Travel Co. Ltd.
7. Society Expeditions
8. Horizon Tours
9. Majestic Tours
10. Lindblad Tours
11. Outward Bound
12. Canadian Arctic Co-operatives Limited
13. Parks Canada
14. Paul Toilet (Horizon affiliate)
15. ZB & Associates Travel Co. Ltd.
16. Canadian Government Office of Tourism
17. Quaivvik
18. Pacific Western Airlines Ltd.
19. Austin Airways
20. Peyton's Lodge, Pangnirtung
21. Nordair Ltd.

Details on the discussions are provided further in this Appendix, but in general the following could be concluded:

i) Opportunity for Tourism

All of the groups currently operating tours (and those not currently active) into the Baffin Region feel that there is a large potential for the development of tourism opportunities in the area. Because of the special nature of the area and the specialized groups that normally tour there, it was found that most operators were knowledgeable of Inuit culture. They appeared to be well aware of the opportunities and constraints this culture places on organized and scheduled tours.

ii) cost

Costs of travel to the eastern Arctic are often stated as very high and, in some cases, prohibitive. Groups feel that with limited scheduled carriers into the area it is difficult to negotiate affordable charter or group rates.[1)]

Costs of hotels and related services are often outlined as a major drawback. (Costs in Frobisher Bay are estimated at $150 per day for food and accommodation.)

Quality of accommodation and level of service are also often indicated as being drawbacks to the development of tourism in the area.

iii) Local Attitudes

It is generally acknowledged that a key factor towards the viability of tourism is education of local residents regarding the overall effects of tourism on the community. The idea that a dollar spent at a tourist facility is a benefit to the community as a whole, is totally abstract to most people. Inherent suspicion to southerners is also a major drawback.

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1) Discussions with Nordair account executives indicate that their airline would be willing to negotiate with reputable operators. The comments related to travel costs should, therefore, be put in perspective as we feel that affordable rates could be negotiated if the minimum group size is 6-8 or more and if reasonable annual use can be guaranteed.

iv) Current Tour Purchasers

The origin of tourists varies with the location of the operator and his penetration area. However, for tours or excursions of a more specialized nature (hunting, fishing), the origins of most, participants appears to be the U.S.A., Europe and other overseas areas, with a small proportion coming from Canada.

Visitor profiles vary according to the type of tour. As expected, most visitors are well-educated, fairly affluent and are over 20 or 25 years of age. Short-term guided tours attract an older market while open, longer-term tours attract a younger, more adventurous group.

v) Methods of Promotion and Advertising

Most operators rely on two methods of advertising: brochures and word-of-mouth. Both methods are claimed to be equally effective and a few have commented that other kinds of advertising are not successful.

Our impression is that because of the very specialized nature of tourism in the north, the target groups can be readily identified. Successful promotions have been carried out utilizing the various naturalist/special interest groups or, for fishing/hunting/special interest groups or, for fishing/hunting by attendance at specific outdoor shows (Sportsman Show). Brochures outlining various northern "packages" have also been utilized with a high success rate. In all cases, however, both from a cost and viability point of view, it was stressed that the description of the "package" should not set expectation levels above what will be provided. This relates specifically to the following:

- degree of organization of the land based component
- quality of fishing/hunting for a tour-oriented on these activities
- clothing/equipment provided
- flight schedules