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## Tunngasaiji: A Tourism Strategy for Nunavummiut

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Cover photography credit; clockwise from top left: Christian Kimber, Nunavut Tourism,  
David Kilabuk (models; Priscilla Angnakak, left Nadia Metuq, right), Nunavut Tourism

## A Message from the Minister of Economic Development & Transportation

But we also recognize the challenges those businesses face. *Tunngasaiji* has its roots in a series of industry, stakeholder and community consultations conducted in 2007 and 2011. The message emerging from those consultations was clear: a successful tourism sector

To address that need, we called on the experience and insight of Nunavummiut, and of their organizations and government. *Tunngasaiji* owes much to the patience and commitment of the many people who generously shared their time and their ideas. The strength of the strategy is a tribute to their contribution.

We have been endowed by history and nature with a world-class tourism destination. Our responsibility is to realize that opportunity to the greatest possible benefit of our land and our people.

Refr. Jester

## A Message from Tourism Partner Organizations

“Piliriqatigiinni/ikajuqtigiinni: working together for a common cause.”

As partners in the development of the Nunavut Tourism Strategy, we are pleased to welcome readers to this document, and to express the support of our respective organizations for the strategy.

One of the key pillars of *Tunngasaiji: A Tourism Strategy for Nunavummiut* is partnership. We recognize that the development of a successful tourism industry will be a long and complex process, requiring the coordination of funding, promotion, training, legislation, infrastructure, and a host of needs in other areas. None of those needs can be met in isolation from the others. All will require coordination, and the strategic commitment of time, people, and resources.

There is no shortcut to success. A thriving tourism sector can only be achieved through commitment by all stakeholders to long-term mutual support, participation and collaboration.

*Tunngasaiji* is evidence of that commitment. The process of developing this strategy has created a successful framework for on-going collaboration between stakeholders that will include the Government of Nunavut's Department of Economic Development & Transportation, Department of Environment, and Department of Culture and Heritage; Nunavut Tourism; Nunavut Tunngavik Inc. (NTI); Parks Canada; Nunavut

Arctic College; municipalities; Nunavummiut; the Inuit Heritage Trust; and the Canadian Northern Economic Development Agency (CanNor).

Each of these stakeholders has contributed their perspectives and insights to the challenge of developing *Tunngasaiji*; each has made a critical contribution to the strategy; and each will be a valued supporter moving forward into the challenging years of implementation.

The process we have been through, and its successful outcome in this strategy, are a heartening example of what we, as Nunavummiut, can achieve when we focus on what we have in common and commit ourselves to success. We have made an excellent beginning: we now commit ourselves to build on that promising start, and we will continue to work in pursuit of a goal we all share: a thriving tourism industry, feeding our economy and celebrating our territory.



The Honourable Peter Taptuna  
Minister of Economic Development & Transportation

Cathy Towntongie  
President, Nunavut Tunngavik Inc.

Michael Hart  
Chairperson, Nunavut Tourism

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# Executive Summary

## Background

Tourism is a critical element of the Nunavut economy.

Tourists are defined as “the travelling public who travel to and stay in places outside their usual place of residence for not more than a year for leisure, business and other purposes”. Serving that group in Nunavut are tourism operators and establishments, including outfitters and hotels and restaurants, along with other tourism-related businesses such as airlines, cruise ships, and community-based businesses such as arts and crafts producers and taxis.

In 2011, tourism-related businesses generated more than \$40 million in revenue, and represented 3.2% of overall Nunavut Gross Domestic Product; accommodation and outfitting businesses alone employed 1,258 Nunavummiut.

Yet despite Nunavut’s successes and the significant amount of revenue generated for tourism-related business and operators, the tourism industry in Nunavut remains underdeveloped. The *2010 Nunavut Economic Outlook* noted a lack of quality tourism products, insufficient training for tourism operators, inadequate investment, and a lack of organizational capacity and coordination among tourism organizations.

Stakeholders in government, industry and the communities have recognized that only a coordinated, strategic approach to tourism development could address those challenges, and ensure the sustainable, long-term growth of a Nunavut-based tourism industry. To that end, a group with representation from the governments of Nunavut and Canada, Nunavut Tourism, Nunavut Tunngavik Inc. (NTI), and other tourism-related organizations have developed *Tunngasaiji: A Tourism Strategy for Nunavummiut* to address the sector’s needs.

## Our Objectives

The strategy seeks to achieve consistent, sustainable growth in the tourism industry by supporting the creation of quality tourism products and services, increasing education and training for tourism operators, establishing effective models and support for community business development, and strengthening the legislative and regulatory environment.

*Photo Courtesy of Nunavut Tourism*

## Values

The *Tourism Strategy* is based on Inuit societal values and the wisdom and experience of Nunavut’s elders. These values are:

**Inuuqatigiitsiarniq:** respecting others, building relationships and caring for others

**Tunnganarniq:** fostering good spirit by being open, welcoming and inclusive

**Pijitsirniq:** serving and providing for family and community

**Aajliqatigiinni:** making decisions through discussion and consensus

**Pilimmaksarniq/Pijariuqsarniq:** developing skills through practice, effort and action

**Piliriqatigiinni/Ikajuqtigiinni:** working together for a common cause

**Qanuqtuurniq:** being innovative and resourceful

**Avatittinnik Kamatsiarniq:** respecting and caring for the land, animals and environment

## Principles

The approach taken by *Tunngasaiji* is based on the principles of:

**Community involvement:** empowering communities for full participation in the tourism economy

**Self-reliance:** providing training and skills to individuals and communities to achieve self-reliance

**Cultural integrity:** celebrating culture and traditions with visitors and building cultural pride and understanding

**Determination and realism:** embracing challenges, innovating, and striving for dynamic and vibrant tourism products

**Cooperation and coordination:** partnering and collaboration among industry, governments and Inuit organizations

**Sustainability:** building for prosperity and longevity while always respecting our people, our culture and our land

**Well-being:** fostering Inuit social, economic and cultural well-being

These goals are expressed through the following specific strategic objectives:

- A renewed *Travel and Tourism Act*, and implementation of associated regulations and policies;
- A framework for the collection of statistical data on Nunavut's tourism sector;
- A structure to promote enhanced coordination and communication among all tourism stakeholders, operators and communities;
- Implementation of the strategy through coordinated investment from key territorial and federal agencies over the life of the strategy;
- Development and enhancement of attractions, products and services;
- Increased Inuit participation and benefits in the development of the tourism sector in Nunavut, as required under the Nunavut Land Claims Agreement and associated Inuit Impact and Benefit Agreements;
- Tourism skills development, education and training programs offered in Nunavut;
- Business development and support targeted to take advantage of tourism opportunities;
- A framework for the active engagement of communities in planning and development of local tourism opportunities.

## Strategic Outcomes

Based on past visitor information and on current trends in Nunavut, Canada and globally, *Tunngasaiji* sets realistic targets for overall growth of the tourism sector. It forecasts total revenues generated by the tourism sector in 2018, the final year of the strategy, of \$49 million; this represents an increase of 23% in tourism revenues over the five-year period of the strategy.

This outcome incorporates specific targets for four key market segments.

- **Business travellers** attending conferences and meetings, educational trips and activities or participating in volunteer programs;
- **Leisure travellers**, visiting for adventure travel in parks, sport hunting and fishing, and cultural and educational experiences;

- **Cruise travellers**, along with the growing number of visitors who arrive by yacht:
- Travellers **visiting friends and/or relations**.

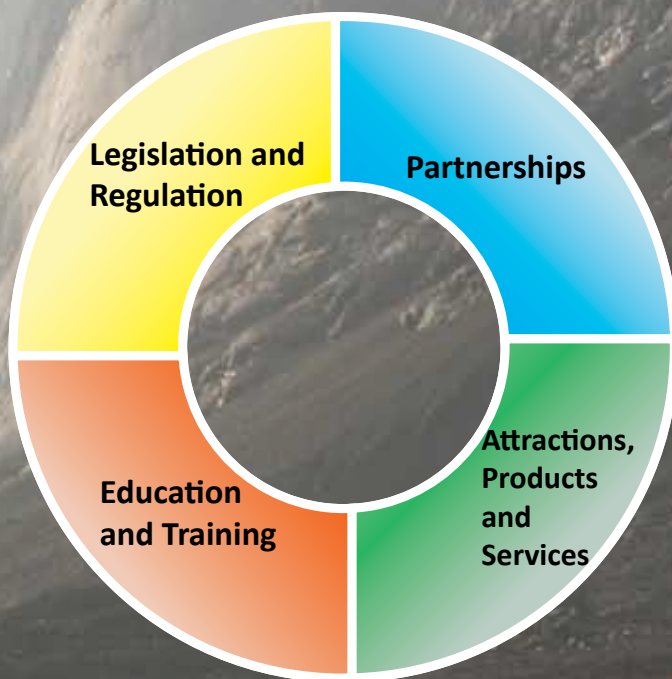
For some of these sectors, accurate baseline data currently is already available; for others, research and data collection in the first two years of the strategy will provide a basis for establishing measurable targets.

## Four Strategic Pillars

*Tunngasaiji* been developed on a foundation of four “pillars”, illustrated below. These provide a comprehensive, linked framework for strengthening the tourism sector and setting the stage for future growth.

- **Legislation and Regulation** renewal will set the governance structure for the industry.
- **Partnerships** are critical to implement the strategy and achieve the vision and goals of *Tunngasaiji*.
- **Attractions, Products and Services** will identify opportunities for development and growth, and provide the framework for increasing the quantity and quality of tourism market segment goods.
- **Education and Training** is essential to developing the capacity of our tourism operators and communities that will advance the growth of the tourism sector.

The pillars are the frame that defines the strategy’s goals, objectives and actions. For each of the four pillars, the strategy sets out **strategic objectives** (statements of what the strategy hopes to achieve), **strategic outcomes** (the anticipated impact of those achievement), and **specific actions** to achieve the desired objectives.



## Pillar: Legislation and Regulation

Authority for governance of the tourism sector in Nunavut rests with the Government of Nunavut, supplemented in some areas by Government of Canada statutes. The strategic objective of this pillar is the writing and enactment of a new Nunavut-specific *Travel and Tourism Act* and regulations to guide the industry to establish standards for tourism products and service, and to ensure compliance with the Nunavut Land Claim Agreement, Inuit Impact Benefit Agreements, and other legislation such as the *Wildlife Act*.

The renewal of the act and regulations will establish a clear, consistent and comprehensive legislative and regulatory framework supporting tourism development, and help new and emerging businesses by creating a clear, streamlined, accessible licensing process for tourism operators. The new framework will also promote understanding and compliance with legal and regulatory requirements among tourism operators.

Actions to be undertaken under this Pillar include:

- Enact new **Travel and Tourism Legislation** by the Government of Nunavut by 2014-15, following consultations with stakeholders and the public
- Develop new **regulations and policies** by the Government of Nunavut by 2015-16, following consultations with stakeholders and the public
- Implement an **information campaign** to increase awareness of the legislation among operators by 2015-16
- Undertake staffing and other measures within ED&T to enable **enforcement of the act and regulations** by 2015-16
- **Support tourism operators and establishments** to assist them in meeting legislated requirements



Photo Courtesy of Lee Narraway

## Pillar: Partnerships

The establishment of a successful and sustainable tourism industry in Nunavut will require coordinated program design and delivery, funding, education and training, community and tourism operator readiness, and the development of world-class attractions, products and services. No single government, institution or business can achieve this alone. The strategic objective of this pillar is to engage communities in tourism planning and development, and to establish a framework for coordination and communication among all tourism stakeholders.

Several organizations participated in the development of the strategy, and will play key roles in its implementation. These include the GN's Department of Economic Development & Transportation, Tourism and Cultural Industries Division; Nunavut Tourism: Nunavut Tunngavik Inc.; the GN's Department of Environment, Parks and Special Places Division; Parks Canada; Nunavut Community Economic Development Organization; the Canadian Northern Economic Development Agency; Nunavut Arctic College; the Inuit Heritage Trust; and the GN's Department of Culture and Heritage. The roles of these stakeholders are defined in the strategy itself, and in the follow-up action plan.

Tunngasaiji will enable partner organizations and communities to identify what they need in order to achieve their goals and fulfill their roles under the strategy, and to coordinate planning, products and service development, training and funding.

Actions to be undertaken under this pillar include:

- **Integrate tourism planning with five-year community economic development planning** at the local level

- **Support Community Tourism Readiness**

**Activities** to increase local understanding of the tourism sector, and to create the conditions for successful tourism development

- Undertake staffing and other measures within ED&T and Nunavut Tourism to **enhance their capacity for implementation** of the strategy

- **Re-establish the Tourism Task Force** for Nunavut as an advisory group on issues facing the tourism industry, coordinating with other agencies whose mandates impact on tourism development

- **Establish a Tourism Training Group** for Nunavut to coordinate planning and implementation of measures to meet training needs within the tourism sector

- **Organize tourism conferences** every three years to discuss and review key themes addressed in the

strategy, to consider industry trends and developments, and to determine how best to build on the foundation created by *Tunngasaiji*

## Pillar: Attractions, Products and Services

The success of the tourism sector will ultimately depend on the quality and number of attractions, products and services offered by our tourism industry. **Attractions** are destinations and places that provide opportunities for recreational, cultural, educational or economic experiences; **products** are activities or items that travellers can purchase; and **services** are actions that assist travellers, such as accommodations, restaurants, and transportation services.

These exist in communities across the territory; however, their availability and quality varies from location to location. *Tunngasaiji* seeks to increase the number of visitors, and the amount of money they spend in the territory, by ensuring that our attractions, products and services meet or exceed the highest standards, while retaining the qualities that make Nunavut a unique destination.

The strategy also seeks to ensure that these enhancements actually benefit communities directly by increasing the number of Nunavut and Inuit-owned businesses and jobs, while building stronger ties between southern-based wholesalers and Nunavummiut.



The strategic objectives of this pillar are to increase visitation and tourism revenues through opportunity-based, coordinated tourism development initiatives; to increase the number of Nunavut-owned market-ready, high-quality attractions, products and services; and to ensure Inuit participation in the tourism industry at representative levels.

Actions to be undertaken under this pillar include:

- Coordinate **research and collection of statistical information** on tourism sector attractions, products and services, to be undertaken starting in 2013-14 by the Tourism and Cultural Industries Division (TCI) of GN ED&T
- Enhance **tourism surveying and reporting** in Nunavut by seeking to establish consistent and complementary methodologies
- Identify opportunities for **development of key attractions**
- Invest in **Parks, Conservation Areas, Historic Places, Heritage Rivers**, and other attractions
- Support the development and promotion of **special event attractions**, including performing arts, cultural programs, festivals, tournaments, educational events, and volunteer tourism projects
- Promote **conferences and meetings** in gateway and

other Nunavut communities

- Prepare and Implement **product and service development** initiatives
- Provide **business support services** to tourism operators
- Prepare and implement a **cruise ship and yacht management plan**
- Establish **occupational standards** for tourism operators and employees
- Clarify and implement responsibilities of key agencies in **branding and marketing** of the Territory and of existing and new attractions, products and services

## Pillar: Education and Training in Tourism

One of the major goals of the strategy is to increase the number of Nunavut and Inuit companies and individuals involved in tourism. The strategy establishes linkages between tourism operator and employee needs and available training and education resources to help create and sustain a service-oriented, professional labour force in the tourism industry. The outcome will be courses, training programs and resources that reflect the realities of Nunavut, and prepare Nunavut operators and employees to plan, manage and market their goods and services to the highest possible standards.

*Photo Courtesy of Nunavut Tourism*



The strategic objective of this pillar therefore is to provide a full range of tourism education and training programs to meet the needs of tourism operators, tourism industry employees, and communities in Nunavut.

Actions to be undertaken under this pillar include:

- Conduct a **tourism skills inventory and needs assessment**. The **skills inventory** will define the skills, knowledge and attitudes required for positions with the Nunavut tourism industry, and determine the extent to which they are reflected in the current labour force; the **needs** assessment, based on the skills inventory, this strategy's objectives, and operator priorities, will identify the gap between current level of skills, knowledge and attitude in the labour force and the industry's actual needs

- Deliver a Nunavut Arctic College Tourism **Diploma Program**

- Provide **modular tourism training courses** for delivery in communities, using both existing courses and additional courses developed and delivered in response to identified needs

- Promote **tourism occupational career training** based on industry-defined standards, promoting development of a skilled labour force, and an improved quality of service

- Provide **training for community economic development officers**, to familiarize them with the principles and approaches underlying tourism development, programs, training and funding

## The Next Steps

*Tunngasaiji* establishes a coordinated approach to implementation through preparation of the Implementation action plan that accompanies the strategy. For each specific action within the strategy, the implementation plan identifies:

- Roles – lead agency and support organizations for implementation of the action;

- Timeframe for implementation;

- Investment needs;

- Potential sources of investment financing;

- Projected outcomes; and

- Specific measures and targets for assessing progress in achieving outcomes.

Some actions will require further research and data collection in order to establish clear targets, and may require the commitment of additional resources not identified in the strategy. These will be addressed through implementation planning coordinated by the Department of Economic Development & Transportation in the initial years of the strategy's implementation.



# Introduction

For Canadian and international travellers, Nunavut represents a new world to discover, with its wealth of unique locations to experience, exciting opportunities to do business, and an immense range of people, cultures, and adventures to be shared.

The tourism industry in Nunavut can support the preservation and promotion of Inuit culture for social and economic gains through active community participation. The industry resonates with the values of sharing, storytelling and communal well-being of elders, youth, and communities, having the potential to build pride within the hearts and minds of residents.

## Tunngasaiji

**A person who welcomes others.**

**“When a visitor comes to your home, you switch chairs so that the visitor will be comfortable, you use the last of the flour to make bannock, you make your visitor feel welcomed.”**

Tourism is a major global industry, bringing growth, employment, and revenue into many of the world’s developing regions. *The United Nations World Tourism Organization (UNWTO)* recognizes tourism as one of the fastest growing global economic sectors, accounting for 5% of world gross domestic product. Despite economic downturns, the global and national tourism sector is growing, and forecasts for the future remain positive.

Closer to home, tourism in Canada was responsible for \$73.4 billion in revenues in 2010 and represented approximately 2% of Canada’s overall gross domestic product (GDP)<sup>1</sup>.

In Nunavut, the tourism sector is comprised of licensed tourism operators and establishments that include outfitters and hotels and restaurants, as well as airlines, cruise ships, and community-based businesses such as arts and crafts businesses and taxis.

Travellers, visitors or tourists are defined as **the travelling public who travel to and stay in places outside their usual place of residence for not more than a year for leisure, business and other purposes.**<sup>2</sup>

Travellers within Nunavut include both residents of Nunavut travelling to other communities and regions, and other Canadian and international travellers. More than half of Nunavut’s travellers are engaged in business; and even these business travellers spend an average of four additional days for leisure activities, often purchasing arts and crafts, gifts and souvenirs, additional travel and guiding services.

Leisure travellers are those who visit family and friends or engage in a recreational or educational trip, visiting our communities, parks and heritage rivers, or travelling along our coastlines by cruise ship. They stay for longer periods of time in hotels, bed and breakfasts and lodges, enjoy meals in restaurants, purchase arts and crafts, and book tours and guiding services.

The *Nunavut Economic Development Strategy* recognizes tourism development as a key component in the economic development of our communities and businesses, and this is confirmed by the statistics.

**Tourism is a celebration. People travel to ‘our community’ to celebrate the rich culture & lifestyle of the Inuit**

**Local operator, Pond Inlet – 2011  
Community & Stakeholder Consultation  
Report**

- The most recent *Nunavut Visitor Exit Survey* estimates that in 2011 tourism-related businesses generated \$40 million in revenue; <sup>3</sup>

- The real GDP calculated from the Nunavut Bureau of statistics sets the value of 2011 tourism related industries revenue as \$41.6 million; <sup>4</sup>

- Available payroll data indicates that employment in licensed tourism accommodation establishments, lodges and outfitters was equivalent to 1,258 full-time positions, and provided over \$15 million in wages. This does not include additional personal income of single owner/operators in the tourism industry, nor the significant employment created in related operations (airlines, taxis, museums, restaurants, retail establishments, and National and Territorial Parks);

- Additional commercial air flights into Nunavut and within Nunavut suggest that overall visitor volumes have grown to 30,525 in 2011. This figure does not include the significant increase in airline charters and rotational work schedules associated with emerging construction and resource extraction projects.

**2011 tourism related businesses generated more than \$40 million in revenue. Tourism-related accommodation and outfitting businesses provided employment to 1,258 Nunavummiut.**

The World Travel and Tourism Council notes that the global trend in spending by the domestic travelling public averages two thirds of travel and tourism revenues. Within Nunavut, 91% of travellers are Canadian, providing scope for promotion of Nunavut within international markets. Of Canadian travellers to Nunavut in 2011, just over 11% are residents of Nunavut. This level of internal travel within Nunavut reflects the relatively small population of the territory, and includes a substantial portion of travel by residents for medical reasons.

Tourism in Nunavut currently accounts for 3.2% of overall Nunavut gross domestic product, higher than

the Canadian GDP percentage for the industry. <sup>5</sup>

However, despite Nunavut's successes and the significant amount of revenue generated by the sector, the tourism industry in Nunavut remains underdeveloped. The *2010 Nunavut Economic Outlook* notes that despite progress over the last decade, the sector is still constrained by the lack of quality tourism products, absence of training for tourism operators, inadequate investment, and limited organizational capacity and coordination among tourism organizations. <sup>6</sup>

Despite these challenges, the Government of Nunavut, Inuit organizations and the private sector have long recognized the exciting potential for growth in Nunavut's tourism sector. And all have agreed to work together on development of collaborative, comprehensive, and long-term strategic approach to tourism development.



Photo Courtesy of Lee Narraway

*Tunngasaiji: A Tourism Strategy for Nunavummiut* is our path to a vibrant, sustainable tourism sector built through strategic action, partnerships, opportunity identification and community involvement. *Tunngasaiji* is the culmination of past work on tourism development, reflecting wide-ranging industry, stakeholder and community consultations done in 2007 and 2011. It is a strategy for Nunavut, developed through the collaborative efforts of the Government of Nunavut's Department of Economic Development & Transportation and Department of Environment - Nunavut Parks and Special Places Division, Nunavut Tourism, Nunavut Tunngavik Inc. (NTI), Parks Canada, Nunavut Arctic College, Nunavut Community Economic Development Organizations (representing the Regional Inuit CEDOs), and the Canadian Northern Economic Development Agency (CanNor).

*Tunngasaiji* identifies the key factors that define the tourism industry in Nunavut today, sets out our shared vision for the industry, and defines measurable, achievable targets for consistent, and sustainable growth. The following sections of the strategy set out the principles, pillars, and objectives that give substance to that vision. Each objective is expressed through a series of realistic, achievable actions assigned to specific stakeholders in government, the private sector, or the network of Nunavut organizations whose mandates support tourism.

The strategy takes a comprehensive and long-term approach, addressing needs at every level and reflecting the challenges, opportunities and realities that shape the tourism sector in our territory. It represents a unique collaboration and a deep commitment by all parties to achieving the vision and goal we all share – a thriving, vibrant tourism industry that provides employment in our communities, growth to our economy, and unforgettable experiences to our visitors.

**A well-run tourism industry requires an enormous effort of coordination and cooperation between active participants, community and regional officials, and non-government organizations.**

*2010 Nunavut Economic Outlook*



## Guiding Values and Principles

The guiding values and principles of *Tunngasaiji* are reflected in the overall objective for the strategy – to establish a foundation for growth and development of a sustainable, Nunavut-based tourism industry that provides benefits for Inuit and all Nunavummiut.

Tunngasaiji encourages greater participation by Inuit and all Nunavummiut to increase the economic benefits of the tourism sector. Nunavut operators, business and communities must engage as full participants in the tourism industry, particularly where Nunavut Land Claims Agreement (NLCA) obligations in regards to wildlife, government contracting, and for Inuit participation in tourism can be met through the achievement of our strategic objectives.

### Values

The tourism strategy is based on Inuit societal values and the wisdom and experience of Nunavut's elders. These values are:

Inuuqatigiitsiarniq:	respecting others, building relationships and caring for others
Tunnganarniq:	fostering good spirit by being open, welcoming and inclusive
Pijitsirniq:	serving and providing for family and community
Aajiiqatigiinni:	making decisions through discussion and consensus
Pilimmaksarniq/Pijariuqsarniq:	developing skills through practice, effort and action
Piliriqatigiinni/Ikajuqtigiinni:	working together for a common cause
Qanuqtuurniq:	being innovative and resourceful

***Tunngasaiji* supports and promotes sustainable tourism development in ways consistent with our culture, interests and abilities, and current realities.**

## Principles

The approach taken by Tunngasaiji is based on the principles of:

Community involvement:	empowering communities for full participation in the tourism economy
Self-reliance:	providing training and skills to individuals and communities to achieve self-reliance
Cultural integrity:	celebrating culture and traditions with visitors and building cultural pride and understanding
Determination and realism:	embracing challenges, innovating, and striving for dynamic and vibrant tourism products
Cooperation and coordination:	partnering and collaboration among industry, governments and Inuit organizations
Sustainability:	building for prosperity and longevity while always respecting our people, our culture and our land
Well-being:	fostering Inuit social, economic and cultural well-being

## Vision

Tourism will be a dynamic, sustainable industry that showcases our outstanding and unique natural, cultural and recreational resources, and contributes to a high quality of life for Nunavummiut.

*Photo Courtesy of Nunavut Tourism*



# The Context for Tourism Development in Nunavut

The starting point for this strategy is the current state of the tourism sector in Nunavut. The recently released *2011 Nunavut Visitor Exit Survey* provides information on current travellers to Nunavut, their characteristics and preferences, and their impacts on the territory. A comparison of the data in this current survey with that of the *2008 Nunavut Visitor Exit Survey* reveals a number of significant trends over this three-year period. However, some caution must be used in this comparison since the survey methodology used for the 2011 survey differs from that of the 2008 survey. The 2011 survey used a longer survey period and a more intensive sampling protocol than in 2008.

## Tourism Sector Revenue

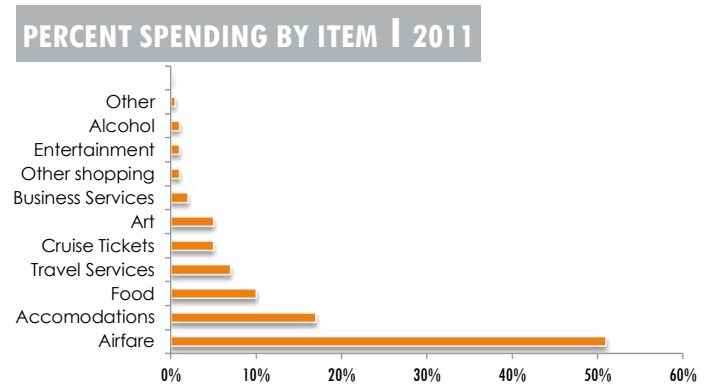
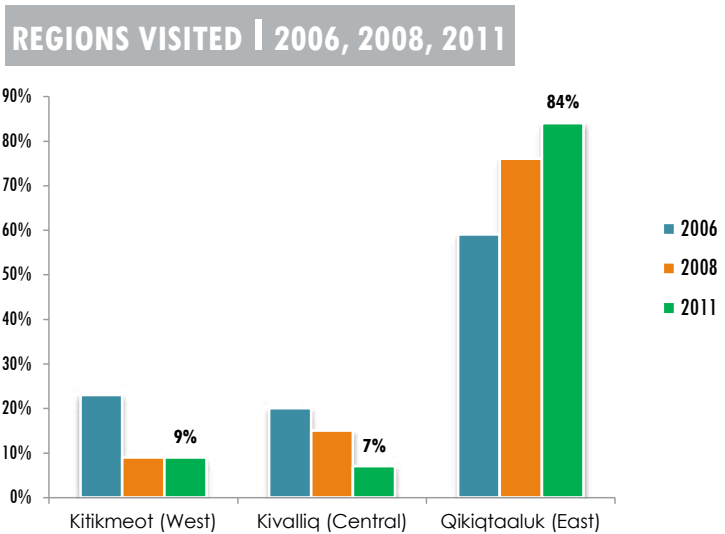
The *2011 Nunavut Visitor Exit Survey* estimates total annual revenue generated by all tourism activities in Nunavut for 2011 to be \$40 million.<sup>7</sup> Similarly, the Nunavut Bureau of Statistics indicates that real GDP for tourism-related industries revenue in 2011 is \$41.6 million.<sup>8</sup> Since 2006, tourism revenue has increased an average of 2.2% per year. In comparison, the combined revenue of all industries in Nunavut increased on average by 5.7% per year. Tourism revenue is clearly not increasing at the same pace as other industries.

Estimated total tourism revenue in the Northwest Territories for 2011 was \$98.2 million. This is substantially more than visitor spending in Nunavut; however, total revenue has increased significantly in Nunavut, over the past few years, while total visitor spending in the Northwest Territories has declined by 30% since 2007.<sup>9</sup>

Data on total tourism revenue by region is not available. However, the *2011 Exit Survey* provides estimates of the percentage of travellers visiting each region. Of total travellers to Nunavut, 84% visited the Qikiqtaaluk region, 9% visited the Kitikmeot region, and 7% the Kivalliq region. The percentage of travellers visiting Qikiqtaaluk has increased steadily since 2006.

Average spending among all travellers on a per-person/per-trip basis in the 2011 exit survey shows that the average traveller to Kitikmeot spent \$4,475; the Qikiqtaaluk average is \$4,558; and the Kivalliq average is \$3,532.<sup>10</sup>

For all travellers to Nunavut in 2011, 51% of spending was on airfare, 17% on accommodations, and 10% on food, as shown in the chart below.



## Investment in the Tourism Sector

Information was collected from all federal government and territorial government departments and agencies, Inuit organizations, and community futures organizations on grants, contributions and loans to the tourism sector for the fiscal year 2011-12 to establish the level of “public” investment in tourism. It does not include investment by private entrepreneurs and chartered lending institutions (banks); it does include operating costs and staffing for the Department of Economic Development & Transportation’s Tourism and Cultural Industries Division, Nunavut Tourism, Department of Environment Parks and Special Places Division, and Parks Canada (Nunavut).

Based on these sources, the total estimated “public” investment in tourism development in Nunavut in 2011-12 was \$25.7 million. The estimated total revenue for the tourism sector of \$40 million thus represents a significant return on investment for these agencies, as well as direct revenue for operators of tourism attractions, products and services.

Of this \$25.7 million, \$16.7 million (65% of the total) was invested in capital projects. Parks Canada and Nunavut Parks and Special Places Division (GN) provided large capital investments through the ongoing development of parks infrastructure. A significant amount of the invested capital was in the form of debt financing for hotel projects. Approximately 6% of total investment supported marketing. Only 1.6% of total investment supported product development, and just 2.0% was invested in organizational support and training.

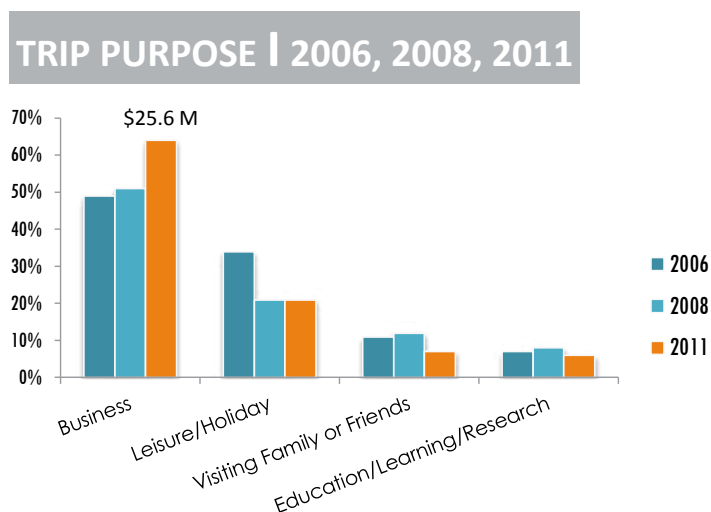
## Types of Travellers

The 2011 Nunavut Visitor Exit Survey found that 57% off travellers classified themselves as business travellers, 31% as leisure travellers, and 12 % as “visiting friends and relatives” (VFR).<sup>11</sup> This represents a significant increase in business travel from 2008, when approximately 50% travelled for business purposes.

In 2011 business travellers accounted for 64% of total tourism revenues, or \$25.6 million, compared to a total of \$14.4 million for leisure and VFR travellers. The 2011 exit survey found that business travellers, on average, spend more time and money in the territory than other traveller types.<sup>12</sup> These figures include workers on construction of resource development projects, but do not capture the multiple trips over a single year made by workers on a rotational work schedule.

According to the 2011 Exit Survey, 91% of travellers to Nunavut are Canadian. Travellers from the U.S.A and other countries represented 4.7% and 4.2% respectively of total travellers. This represents a significant decline in international travellers from 2006 and 2008, when approximately 13% of travellers were from the United States and 4% from other countries.

For the Northwest Territories, the percentage of Canadian travellers is approximately 80%, with a higher proportion of international travellers. The same is true for Canada as a whole, where travel by Canadians represents 81% of overall tourism, with 19% demand from international travellers.



## Tourism Attractions and Products

Many types of attractions draw travellers to Nunavut. The Nunavut Tourism website lists a total of 60 major attractions, including:

- National Parks
- Territorial Parks
- Heritage Rivers
- Museums, Heritage and Other Visitor Centres
- Bird and Wildlife Sanctuaries

All provide opportunities for development of specific tourism products. The Nunavut Tourism website features a variety of current tourism products provided by outfitters and tour companies, including activity areas such as arts and culture, wildlife viewing, hard and soft adventure trips, fishing and sports hunting, and cruises.

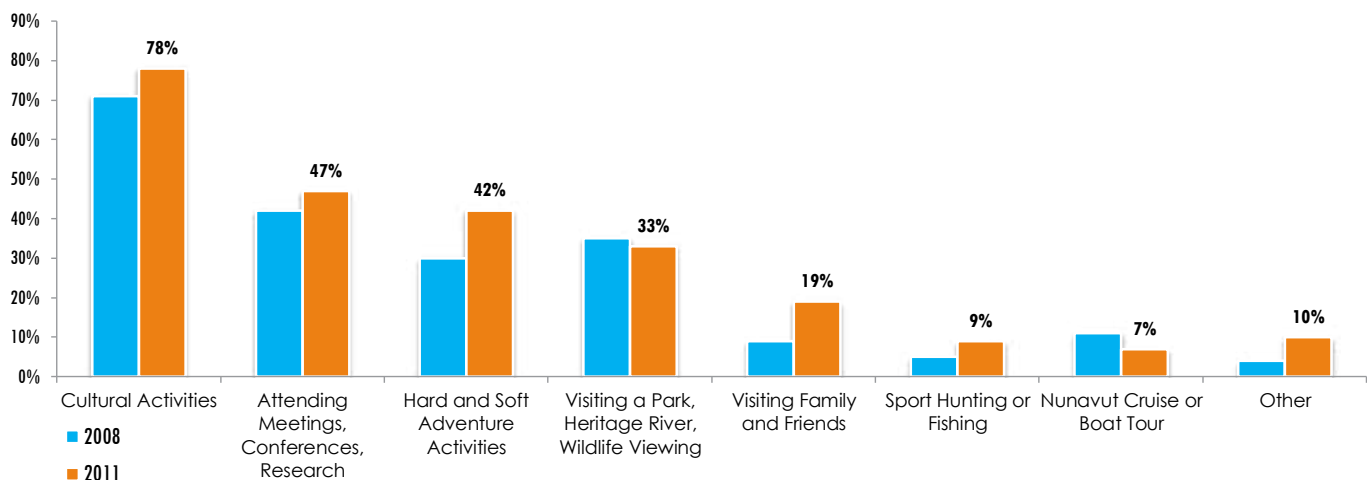
Although the exit surveys do not address specific market segments (cultural tourism, hard and soft adventure tourism, etc.), the 2011 exit survey does compare 2008 and 2011 data on visitor participation in specific activities, summarized in the table on the following page. Since travellers recorded multiple responses, the participation rates do not add up to 100%.

Among the top activities in 2011 are **cultural activities** (shopping for art, visiting a museum or cultural centre and cultural experiences); **business activities** (attending meetings, conferences, educational or research activities); **hard and soft adventure activities** (hiking, camping, kayaking or skiing); and **visiting a park, heritage river and viewing wildlife**.



Photo Courtesy of Tom Knight / Parks Canada

### VISITOR PARTICIPATION in ACTIVITIES by YEAR - 2008, 2011



## Employment in the Tourism Sector

There is no information available on total employment within the tourism sector in Nunavut. However, data is available on employment with tourism establishments (accommodation facilities) and lodges and outfitters who have employees and submit payroll tax. For tourism providers with employees, total employment in 2010 was 1,258, and total employee payroll was \$15.03 million. 1,173 of these employees worked in tourism establishments, with 71 working in lodges and 14 working with outfitters.

The employment profile for Nunavut includes additional sectors of the industry that are not included in the available data. Future data collection must gather baseline information on individual tourism operators without employees, full-time and part-time employment in federal and territorial departments associated with tourism (e.g. National and Territorial Parks), other tourism agencies, airlines, taxis, visitor centres, museums, and tourism related retail establishments.

## Tourism Establishments and Outfitters

In 2011 there were 53 licensed outfitters registered with the Department of Economic Development & Transportation in Nunavut, as shown in the following chart below. These numbers have remained fairly consistent over the past three years, although the number of licensed outfitters in the Kivalliq region decreased from a high of 10 in 2007. However, the specific outfitters operating in any one year can vary depending on circumstances.



Photo Courtesy of Nunavut Tourism

## Outfitters and Tourism Establishments, Nunavut 2007-2011

Outfitters	2011	2009	2007
Qikiqtaaluk	42	37	37
Kivalliq	2	7	10
Kitikmeot	9	6	9
<b>Totals</b>	<b>53</b>	<b>50</b>	<b>56</b>
Tourism Establishments	2011	2009	2007
Qikiqtaaluk	26	20	32
Kivalliq	30	25	27
Kitikmeot	31	18	27
<b>Totals</b>	<b>87</b>	<b>63</b>	<b>86</b>

The Inuit Firm Registry lists 27 firms as Inuit-owned businesses operating “Accommodation and Restaurant” businesses, including Inns North co-operative-owned hotels; 39 Inuit-owned firms are registered as operating “Harvesting, Guiding and Remote Camp” businesses. Data provided by the Department of Economic Development & Transportation indicates that licensed sports hunts and fishing revenues have declined significantly in the past five years:

- Polar bear sports hunts decreased from 135 in 2006-07 to 24 in 2009-10, due in part to the ban on export of polar bear skins to the U.S., representing a loss of \$3.3 million in revenue to outfitters;
- Caribou sports hunts declined from 2,016 in 2006-07 to 157 in 2010-11, representing a loss of \$177,000 in revenue to outfitters;
- Musk-ox sports hunts decreased from 166 in 2006-07 to 119 in 2010-11, representing a loss of \$470,000 in revenue to outfitters;
- Sport fishing decreased \$2.3 million from 2005 to 2010.<sup>13</sup>

These declines reflect a general trend away from sports hunting and fishing toward eco-tourism activities with low environmental impact. There has also been a corresponding reduction in the number of sports hunting and fishing outfitters, to the point that there are currently not enough outfitters to meet the demand for sports hunts and fishing trips. Many of the outfitters that moved out of this area have not been able to develop new products, such as ecotourism-oriented tours.

## Key Challenges for the Sector

Tourism operators, communities and tourism stakeholder organizations identified a number of challenges that must be addressed in order to achieve a sustainable, thriving tourism sector in Nunavut:

- Nunavut-specific tourism and travel legislation and regulations need to be in place to guide development of the industry;
- There is a critical need to focus on the development of tourism attractions, products and services, with marketing in line with the availability of quality products and services;
- There are significant gaps in the quantitative and qualitative data on the tourism sector necessary for effective planning, monitoring and evaluation of a tourism development strategy;
- Tourism operators in the communities must deal with high operating costs, short business seasons, shortages of trained personnel, and limited market access, resulting in many cases in inconsistent operation of community tourism businesses from year to year and a need to consider possible new models for organizing tourism businesses at the community level;
- Unlicensed tourism operators undermine legitimate tourism businesses, and put at risk the safety of travellers and the reputation of the entire tourism industry;
- There is a critical need to raise awareness among tourism-related businesses and communities of standards and expectations within the hospitality sector; this requires clear communication of national and international standards and identification of incentives to promote a more service-oriented culture;
- The benefits of cruise ship visitation must be reviewed and assessed, leading to preparation of a strategic cruise ship management plan;
- Successful tourism development and a return on the investment of funds in tourism requires a coordinated

approach among tourism sector partner organizations that focuses on critical current needs as well as the foundations for longer-term sustainable development;

- Additional investment in education and training are needed to ensure successful development of the tourism sector;
- The high cost of infrastructure development and operation is a barrier to all sectors of the economy; current and future tourism infrastructure in communities must be designed for multiple purpose use, offering benefits to a community that extend beyond the tourism sector alone.

The quality of tourism attractions, products and services are key factors in a person's decision to travel to or recommend a destination in Nunavut. In this age of social media, when visitors can share their experiences before, during and after their trip, it is vital to ensure that all travellers to Nunavut enjoy a quality experience that measures up to and exceeds those offered by other tourism destinations.

The strategy will promote Nunavut-based successes, highlighting Inuit and other Nunavummiut operating profitable, sustainable tourism businesses, encouraging others to invest resources and time into tourism enterprises.

*Qavavau Manumie discusses a stonecut print with a visitor at the West Baffin Eskimo Co-op in Cape Dorset. Photo Courtesy of Lee Narraway*



## Strategic Objectives of *Tunngasaiji*

The overall objective of *Tunngasaiji* is to provide a foundation for growth and development of a sustainable, Nunavut-based tourism industry that provides benefits for Inuit and all Nunavummiut.

*Tunngasaiji* focuses on what needs to be done over the next five years to make the tourism sector grow. There are three key elements underlying the approach taken in the strategy.

First, the strategy is foundational. To achieve consistent, sustainable growth, the Nunavut-based tourism industry must focus resources on strengthening the foundation of tourism development. These include development of quality tourism products and services, increased education and training for tourism operators, more effective models and support for community tourism business development, and a supportive legislative and regulatory environment.

Second, sustainable long-term growth of the Nunavut-based tourism industry requires a coordinated, strategic approach to development. Emphasis must be placed on identifying the best opportunities for increasing the economic and social benefits from tourism. A strategic approach to the sector that is opportunity driven will be firmly based on assessment of demand and business success in order to maximize the benefits that flow to our tourism operators and communities.

Third, the strategy is based on partnerships. Collaboration and coordination is essential among all organizations involved in tourism at the community, regional, territorial and national levels to ensure that effective joint planning can be undertaken, and available resources can be applied to tourism development opportunities in the most effective ways. At the community level, increased coordination will support a more strategic, opportunity-based approach to development and the marshaling of required resources to provide coordinated and staged support for development of community tourism businesses.

The strategic objectives of *Tunngasaiji* are:

- A renewed Travel and Tourism Act, and implementation of associated regulations and policies;
- A framework for the collection of statistical data on Nunavut's tourism sector;
- A structure to promote enhanced coordination and communication among all tourism stakeholders, operators and communities;
- Implementation of the strategy through coordinated investment from key territorial and federal agencies over the life of the strategy;
- Development and enhancement of attractions, products and services;
- Increased Inuit participation and benefits in the development of the tourism sector in Nunavut, as required under the Nunavut Land Claims Agreement and associated Inuit Impact and Benefit Agreements;
- Tourism skills development, education and training programs offered in Nunavut;
- Business development and support targeted to take advantage of tourism opportunities;
- A framework for the active engagement of communities in planning and development local tourism opportunities.

*Photo Courtesy of Lee Narraway*



## Action Plan

Tunngasaiji establishes a coordinated approach to implementation through preparation of an implementation action plan. For each specific action within the strategy, the implementation plan identifies:

- Roles – Lead agency and support organizations for implementation of the action;
- Timeframe for implementation;
- Investment needs;
- Potential sources of investment financing;
- Projected outcomes; and
- Specific measures and targets for assessing progress in achieving outcomes.

Some actions will require further research and data collection in order to establish clear targets, and may require the commitment of additional resources not identified in the strategy. These will be addressed through implementation planning coordinated by the Department of Economic Development & Transportation in the initial years of the strategy's implementation.

## Strategic Outcomes

*Tunngasaiji* identifies goals and actions required over the next five years for development of a strong tourism sector in Nunavut. The strategy provides the framework for defining measurable outcomes that include:

- Targets for overall growth of the tourism sector;
- Specific targets for development of key tourism market segments;
- Identification of indicators to track and assess progress towards the identified outcome.

Where baseline data currently exists in relation to a particular outcome and its associated indicator, a specific target has been identified within the current version of the strategy based on the currently available data. Where required data is not available, it will be a priority to undertake further data collection, research and market studies as the basis for reviewing or establishing measurable targets in the early stages of implementation of *Tunngasaiji*.

### 1. Tourism Sector Targets: 2013-2018

#### REVENUE TARGET

There is currently no territorial standard within Nunavut for projecting future levels of revenue in the tourism sector.

The *2011 Nunavut Visitor Exit Survey* estimated that total annual revenue in the tourism sector in 2011 was \$40 million, or approximately 3.2% of total Nunavut GDP. In comparison, for other countries in the world, tourism represents an average of 5% of total GDP.

Between 2006 and 2011, tourism revenue in Nunavut grew at an average rate of 2.2% per year, while the average rate of growth for all sectors of the Nunavut economy was 5.7%.

A reasonable target for revenue growth in the Nunavut tourism sector can be established for the planning period of 2013-2018 by projecting that the growth of revenue for the tourism sector will increase from 2.2% to 4.0% over the five-year period, in the following increments:

Year	Increase in Total Tourism Revenue
Transition Year	
2012-13	2.20%
Strategy Planning Period	
2013-14	2.20%
2014-15	3.00%
2015-16	3.50%
2016-17	3.50%
2017-18	4.00%

Therefore, at the start of the five-year period (2013), total revenue generated by the tourism sector is estimated at \$41.8 million. By the end of the five-year period (2018), the target for total revenue generated by the tourism sector will be \$49 million. This represents an increase of 23% in total revenue generated by tourism over the five-year period.

Tracking of total revenue generated by the tourism sector through the *Nunavut Visitor Exit Surveys* and other means will allow for a general assessment of return on “public” investment in the development of the industry.

## OTHER KEY TOURISM SECTOR MEASURES

The strategy calls for development of standard indicators to measure growth in the tourism sector, based on the collection and reporting of quantitative and/or qualitative data.

This will require collection of baseline data in areas where there are currently information gaps. These include:

- Air passenger volumes;
- Total number of travellers in Nunavut;
- Employment in tourism-related jobs:
  - Total employment of Nunavummiut in tourism-related jobs;
  - Total employment of Inuit in tourism-related jobs;
- Tourism-related businesses operating in Nunavut:
  - Total number of Nunavut-based businesses;
  - Total number of Inuit businesses.

Collection of initial baseline data in these areas will be a priority in years one and two of the strategy, which will include data collection for the *2014 Nunavut Visitor Exit Survey*. Under *Tunngasaiji*, the Department of Economic Development & Transportation is the lead agency for coordinating tourism research and the collection of tourism-related data. The establishment of

baseline data will therefore be coordinated by Department of Economic Development & Transportation, with ongoing support from the Nunavut Bureau of Statistics, and will allow for establishment by the GN Department of ED&T of strategic targets for growth in these areas as part of the implementation of the strategy.

Reports on the state of tourism will be provided on an ongoing basis, and summarized in a *Report on the State of Tourism in Nunavut* to be prepared in 2018 at the end of the five-year period by the GN Department of ED&T.

## 2. Tourism Market Segment Targets 2013 - 2018

The overall targets for growth of the tourism sector will be supported by strategies for development of the key traveller market segments identified in the 2011 exit survey. These market segments are Business, Leisure, Cruise Ships, and Visiting Family and Friends (VFR).

Where there is insufficient baseline information on some of these market segments to establish targets for growth, these data gaps will again be addressed by the GN Department of ED&T as the basis for establishment targets for the measurable outcomes and indicators outlined below.

### BUSINESS TRAVELLERS

Business travellers make up 57% of all travellers in Nunavut, and represent the largest group of travellers. Some of the characteristics of this market segment include:

- 95% are Canadian;
- Business travellers tend to stay for longer periods than other travellers;
- Between 2008 and 2011 the number of business travellers increased 13.7% as a proportion of travellers overall;
- In 2011, business travellers spent an average of \$4,517 per person per trip; 40.6% of the total spent was on items other than transportation.

## Targets for the Business Traveller Market:

### Market Focus:

Increase business traveller visitation across Nunavut through marketing initiatives focused on domestic business traveller market.

### Measure:

Resident and non-resident business travellers as a proportion of all travellers.

### Target:

Collect baseline data by 2014-15, and establish targets for increase in the total number of business travellers over the remaining period to 2018.

### Market Focus:

Increase spending by business travellers on products and services other than transportation.

### Measure:

Spending per person on items other than transportation.

### Target:

By 2018, 55% of business traveller expenditure will be on items other than transportation (a figure equal to the percentage spent by leisure travellers in 2011).

### Market Focus:

Increase the number of business travellers attending conferences and meetings, educational trips and activities, or participating in volunteer programs.

### Measure:

Number of meetings and conferences, educational trips and activities, and volunteer trips.

### Target:

Collect baseline data by 2014-15 and establish a target for growth over the remaining period by 2018.

## LEISURE TRAVELLERS

The *2011 Nunavut Visitor Exit Survey* reported that “leisure” was the primary purpose of 20.9% of travellers. Leisure travellers include those visiting for hard and soft adventure travel in parks, sport hunting and fishing travellers, and culture and education travellers. Some of the characteristics of this market segment include:

- 81% of leisure travellers are Canadian, 10% are American, and 9% are from other countries;
- Between 2008 and 2011, the number of leisure travellers decreased by 7.1% as a proportion of travellers overall;
- In 2011, leisure travellers spent an average of \$4,450 per person per trip. 51.5% of the total spent was on items other than transportation;
- Americans have decreased 10% since 2008 as an overall percentage of leisure travellers, while Canadians have increased by 9%.

Four specific areas of leisure tourism will require more detailed, ongoing data collection in the future.

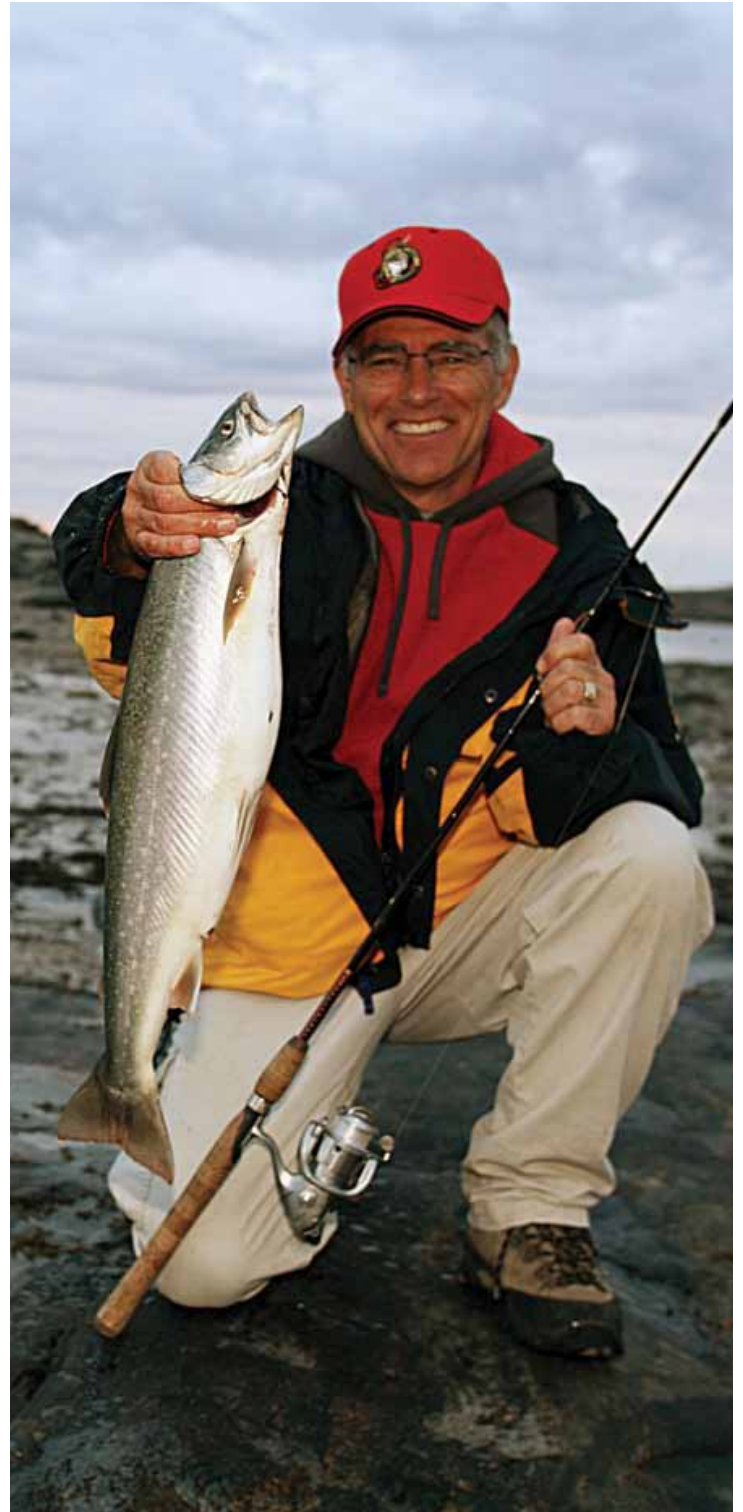
- **Cultural Tourism:** Over 75% of travellers to Nunavut in 2011 participated in cultural tourism (Inuit and other cultural activities), and worldwide demand for authentic Aboriginal tourism products is increasing.

- **Sport Hunting and Fishing:** The Department of ED&T reported in 2011-12 that revenue from sport hunting and fishing had declined by \$6.24 million in the past five years.<sup>14</sup> Although this remains an important market for some Nunavut outfitters, there are currently not enough sport hunt and fishing outfitters to meet market demand.

- **Adventure Travellers:** The adventure traveller market is growing worldwide, particularly in the demand for high-end adventure and guided trips. Between 2009 and 2010, the worldwide adventure tourism market grew by over 17%; and approximately 75% of travellers in North America are identified as adventure travellers.

- **Parks and Heritage Rivers:** According to the 2011 exit survey, a third of travellers to Nunavut visit parks or heritage rivers, generating a significant amount of visitor revenue. A 2009 report on the economic impact of national and territorial parks calculated total spending by visitors as \$7.2 million.<sup>15</sup>

*Photo Courtesy of Lee Narraway*



## Targets for Leisure Traveller Market

### Market Focus:

Increase leisure traveller visitation to Nunavut through continued emphasis on Canadian market, along with development activities for the international market.

### Measure:

Leisure travellers as a proportion of overall travellers.

### Target:

By 2018, the percentage of leisure travellers as proportion of overall travellers will return to 2008 level of 28%.

### Market Focus:

Increase spending per person by leisure travellers on items other than transportation by providing enhanced services and product selection in communities.

### Measure:

Spending per person on items other than transportation.

### Target:

By 2018, a minimum of 55% of expenditures will be on items other than transportation.

### Market Focus:

Increase revenue generated through Inuit cultural tourism products and services as a fundamental element of the visitor experience in Nunavut.

### Measure:

Cultural tourism revenue.

### Target:

Collect baseline data by 2014-15 and establish a target for growth over the remaining period to 2018.

## Targets for Leisure Traveller Market

### Market Focus:

Maintain or increase revenue generated by sport fishing and sport hunting, recognizing that HTOs have responsibility under the NLCA for the allocation of community tags, and the need for providing support to outfitters in diversifying to cultural, adventure and eco-tourism oriented products.

### Measure:

Sport fishing and hunting revenue.

### Target:

By 2018 revenues for sport fishing and hunting will return at least to 2010 levels.

### Market Focus:

Increase the number and quality of adventure package tours in Nunavut.

### Measure:

Adventure tourism revenue.

### Target:

Collect baseline data by 2014-15 and establish a target for growth over the remaining period to 2018.

### Market Focus:

Increase the revenue generated directly or indirectly by tourism associated with national and territorial parks and heritage rivers in Nunavut.

### Measure:

Park and heritage river tourism revenue.

### Target:

Collect baseline data by 2014-15 and establish a target for growth over the remaining period to 2018.

## CRUISE TRAVELLERS

In 2011, Nunavut hosted 1,890 cruise passengers from eighteen cruise ship journeys.<sup>16</sup> This represents a decrease of 36.2% from the number of cruise ship passengers in 2008; nevertheless, it is expected that cruise sailings will stabilize around twenty-five per year, based on the availability of ice-protected ships and other factors.<sup>17</sup> Other marine-based tourism opportunities are emerging, including a recent surge in yacht traffic.

In 2011, Cruise ship passengers, however, spent an average of only \$1,631 on items other than

transportation (23% of spending on other items, which is significantly lower than the other three market segment groups). The cruise ship industry requires much greater regulation and oversight, as well as an assessment of the potential benefits, and costs, of this market.

### Targets for Cruise Traveller Market

#### Market Focus:

Analyze the cruise ship and marine travel market to determine to pros and cons of this market, and prepare a cruise ship and yacht management plan.

#### Measure:

Revenue from cruise ship visitations.

#### Target:

Collect baseline data by 2014-15 and establish a target for growth over the remaining period to 2018.

#### Market Focus:

Institute new approaches based on market analysis and the provision of enhanced services and product selection in communities to increase average spending per passenger on items other than transportation.

#### Measure:

Spending per person on goods and services other than cruise ship passage cost.

#### Target:

By 2018 35% of expenditures by cruise ship passengers will be on goods and services other than transportation.

## VISITING FRIENDS AND RELATIVES (VFR)

In the 2011 exit survey, 7% of travellers indicated that VFR was the primary purpose of their trip. 99% of these VFR travellers identified as Canadian. VFR travellers spend a high proportion of overall spending on goods other than transportation.

Between 2008 and 2011 the number of leisure travellers decreased by 7% as a proportion of overall traveller volume. In 2011 VFR travellers total spending was \$1,825 per person per trip. Of total spending, 58.5% of the total spent was on items other than transportation.

### Target for VFR Market

#### Market Focus:

Increase the spending of VFR travellers through greater availability of appropriate, quality products.

#### Measure:

VFR spending per person on goods other than transportation.

#### Target:

By 2018, a minimum of 68% of expenditures on goods other than transportation.

## Pillars of Tourism in Nunavut

The tourism strategy has been developed on a foundation of four “pillars”, illustrated below. These represent the key areas that frame the goals, objectives and actions described in the next section of this document. Taken together, they represent a comprehensive, linked framework for strengthening the tourism sector and setting the stage for future growth.



## Pillar: Legislation and Regulation

### Strategic Objective:

To enact a new *Travel and Tourism Act* and associated regulations to guide development of the tourism industry and support implementation of *Tunngasaiji: A Tourism Strategy for Nunavut*

One of highest priorities under *Tunngasaiji* is the creation and enactment of a new *Travel and Tourism Act*.

Authority for governance of the tourism sector in Nunavut rests with the Government of Nunavut, supplemented in some areas by Government of Canada statutes. It has long been recognized that a Nunavut-specific framework of legislation and regulation for tourism will be essential to guide the industry, to establish standards for tourism products and service, and to ensure compliance with the Nunavut Land Claims Agreement, Inuit Impact Benefit Agreements, and other legislation such as the Wildlife Act.

The renewal of the act and regulations will also provide an opportunity to address many of the concerns and gaps identified over the years by operators and regulators alike. These include:

- A licensing system that reduces overlaps with other related licensing processes;
- An effective mechanism for collecting current data from licensed tourism operators, as outlined under the *Attractions, Products and Services Pillar*;
- Policies and regulations to address the rapid growth of cruise ship and yacht traffic.

Enforcement of the Act and regulations will be a critical component of their success. Unlicensed tourism operators endanger the reputation of the sector and undermine the market for legitimate, licensed operators across Nunavut. The Department of ED&T will enforce the renewed legislation and policy, assist tourism operators in meeting regulations, and carry out a

marketing campaign to increase awareness and understanding of the *Travel and Tourism Act*. Nunavut Tourism, other territorial and federal departments, and the Tourism Task Force for Nunavut will support the GN Department of ED&T in increasing the awareness of tourism operators of legislation and regulations, and in coordinating enforcement and inspections of licensed operators.

**Government must provide more support for the development of small businesses, as well as reduce administrative and regulatory hurdles that entrepreneurs will need to overcome to build new industries.**

*CLC Tamapta 2009 - 2013*

### Strategic Outcomes:

- A renewed legislative and regulatory framework supporting tourism development
- A clear, streamlined, accessible licensing process for tourism operators

#### Action: Enact Travel and Tourism Legislation

The Government of Nunavut will draft a new *Travel and Tourism Act*, working in consultation with the Government of Canada agencies also involved in the regulation of tourism activities, NTI and RIAs, and Nunavut Tourism. The renewed act will incorporate recommendations from the 2009 review of the current legislation. It will be drafted in 2013-14 and presented to the legislature by 2014-15 following consultations with stakeholders and the public.

#### Action: Review and Develop Regulations and Policies

In parallel with the creation of a revised *Travel and Tourism Act*, the Government of Nunavut will develop regulations to support tourism development, operations, and activity across the territory.

Building on recommendations of the 2009 review of the current legislation, and working with industry and other regulators (including Transport Canada, Parks Canada, Canadian Wildlife Service and others), the GN will establish regulations that:

- Create a healthy and safe operating environment for tourism;
- Streamline the tourism operator licensing process and minimize duplication with other statute;
- Address regulatory and policy gaps;
- Affirm a zero-tolerance policy for non-licensed tourism operators in the territory.

Following consultations with tourism industry, regulations will be drafted in 2013 to 2015 for final approval in 2015-16. Development of associated policies will also be completed by 2015-16.

#### Strategic Outcome:

- Greater understanding and compliance among tourism operators with legal and regulatory requirements

#### Action: Increase Awareness of Acts and Regulations Related to Tourism

In 2015-16 the GN Department of ED&T will play a lead role in implementing an information campaign to increase awareness of the legislation among operators. Elements of this campaign will include:

- Publication of a plain language version of the act and regulations;
- Participation in trade shows and annual general meetings;
- Delivery of regional and community workshops;

- Provision of consistent, accurate, timely and comprehensive information to tourism operators through partners' websites, print, and other communication tools.

The department will implement the awareness campaign in cooperation with Nunavut Tourism, other territorial government and federal government regulatory departments, and the Tourism Task Force for Nunavut (see Pillar 2 – Partnerships).

#### Action: Enforce Tourism-Related Acts and Regulations

Enforcement of the act and regulations, as well as coordination with other federal and territorial agencies involved in the enforcement of legislation and regulations affecting tourism in Nunavut, will be undertaken by the Department of ED&T. By 2015-16, the department will establish up to three new Tourism Officer positions in the regions.

Regional Tourism Officers will have dedicated responsibilities for:

- Enforcing the Travel and Tourism Act and Regulations;
- Cooperating and coordinating information exchange inspections with other territorial and federal regulatory agencies;
- Providing information and support to tourism operators for meeting regulations.

#### Action: Support Tourism Operators and Establishments in meeting Legislated Requirements

For the duration of the strategy, the Department of ED&T Regional Tourism Officers will provide a single point of contact in each region to help tourism operators in:

- Applying for and renewing licences;
- Obtaining information and support to enable operators to meet all regulatory requirements;

- Providing general assistance and support to operators on tourism development;
- Obtaining information on other business supports available to operators, in coordination with the Community Economic Development Officers (see *Pillar: Business Development and Community Readiness*).



Photo Courtesy of Nunavut Tourism

## Pillar: Partnerships

### Strategic Objective:

To engage communities in tourism planning and development, and to establish a framework for coordination and communication among all tourism stakeholders

The establishment of a successful and sustainable tourism industry in Nunavut will require coordinated planning and action in many diverse areas: these include program design and delivery, funding, education and training, community and tourism operator readiness, and the development of world-class attractions, products and services. No single government, institution or business has the mandate or capacity to achieve this alone. That is why a key pillar of *Tunngasaiji* is “partnership”.

Our goals can only be met by affirming and strengthening partnerships between all levels of government, Inuit organizations, Nunavut Tourism, communities and tourism operators, and other tourism stakeholders. These links have been clarified and reinforced through the process of preparing *Tunngasaiji: A Tourism Strategy for Nunavut*, which has required close collaboration among tourism stakeholder organizations. The organizations that participated in the development of the strategy, and that will have key roles and responsibilities moving forward into implementation of the strategy, are:

#### ***GN Department of Economic Development & Transportation, Tourism and Cultural Industries Division:***

Lead agency under the strategy for tourism development and for coordinating inter-agency implementation of *Tunngasaiji*; legislation and regulation of the tourism sector; research and policy development for tourism; coordination of data collection, analysis and reporting of tourism statistics; Secretariat for Tourism Task Force for Nunavut; coordination of tourism product development; linkages with strategies for arts and crafts and film production; and branding and marketing of Nunavut.

#### ***Nunavut Tourism:***

Lead agency under the strategy representing the tourism industry; destination branding and marketing and member marketing; collection of tourism statistics through management of visitor exit surveys and conversion studies; industry advocacy and member services; operation of three gateway visitor centres; secretariat services for Tourism Training Group for Nunavut.

#### ***Nunavut Tunngavik***

Nunavut-wide representative working in conjunction with the Regional Inuit Associations on Inuit rights and interests under the NLCA and associated Inuit Impact and Benefit Agreements.

#### ***GN Department of Environment, Parks and Special Places Division:***

Responsible for establishment, development and marketing of Territorial Parks and Canadian Heritage Rivers, and co-management of territorial parks with Inuit organizations under Inuit Impact and Benefit Agreements.

**By working in partnership with government, communities will become more economically active, productive, and self-reliant and Nunavummiut will continue to be stewards of our environment.**

*CLC Tamapta 2009 - 2013*

#### ***Parks Canada:***

Responsible for establishment, development and marketing of national parks, and co-management with Inuit organizations under Inuit Impact and Benefit Agreements.

### ***Nunavut Community Economic Development Organization (Nunavut CEDO):***

Inuit business development agency associated with the Regional Inuit Community Economic Development Organizations (Regional Inuit CEDOs).

### ***Canadian Northern Economic Development Agency:***

The primary federal agency in Nunavut with responsibility for funding tourism development as part of overall economic development and for coordinating all federal agencies in the territory.

### ***Nunavut Arctic College:***

The primary post-secondary institution in Nunavut providing training and education to Nunavummiut located in three regional campuses and twenty-five community learning centres.

It is recognized that other organizations with roles and responsibilities for tourism development will be involved in implementation of *Tunngasaiji*:

### ***Inuit Heritage Trust:***

Responsible under the Nunavut Land Claims Agreement for the preservation, enrichment and protection of Inuit cultural heritage and identity embodied in Nunavut's archaeology sites, ethnographic resources and traditional place names, based on the principle of respect for traditional knowledge and wisdom of our Elders.

### ***GN Department of Culture and Heritage:***

Responsible for the conservation, protection, promotion and enhancement of the cultural richness of Nunavut. These objectives are achieved through the development and delivery of archaeology, toponymy, museums, archives and library policies, programs and services. Culture and Heritage provides grants and contributions to assist community-based heritage initiatives and supports the growth and development of Nunavut's artistic community.

New partnership models will be required for implementation of *Tunngasaiji* in order to achieve results that are beyond the scope or capacity of the individual agencies in the tourism sector. The strategy establishes two tourism coordinating bodies to support the development of the tourism industry: The Tourism Task Force for Nunavut (TTFN), and the Tourism Training Group for Nunavut (TTGN).

**Our focus will be on communities and people working with government to build our future.**

*CLC Tamapta 2009 - 2013*

### **Strategic Outcome:**

- **Communities are active in the planning and implementation tourism development**

Communities are at the heart of tourism in Nunavut. They are the home of most major events and attractions, the transportation and service hub for travellers, and the site of each visitor's first encounter with our land and culture.

*Tunngasaiji* focuses on what communities will need in order to plan and achieve successful tourism development, and to create a welcoming, service-oriented environment for tourists. The strategy recognizes that communities will need support at several stages of preparation, including:

- A realistic assessment of community readiness for tourism;
- Initiatives to raise community awareness of the nature and importance of the tourism sector;
- Development of an integrated community plan for tourism, incorporating input from businesses and the community as a whole;

- Identification of critical infrastructure needs to support the sector (including airports, wharfs, hotels and restaurants), and planning to update or repurpose existing infrastructure where necessary.

#### **Action: Community Economic Development Planning**

Communities forecast their economic growth through their five-year community economic development plans. Tourism is not a priority for all communities, due to travel costs, distance from markets, lack of attractions, or other higher priorities. But for communities that do choose to pursue tourism development, a CED Plan is the ideal medium for identification of opportunities, and identification of needs. It is also a prerequisite if the community chooses to pursue special funding for tourism development.

#### **Action: Support Community Tourism Readiness Activities**

“Tourism readiness” refers to measures a community will take in order to increase their understanding of the tourism sector, and to the actions needed to create the conditions for successful tourism development.

The Tourism Task Force for Nunavut will take the lead in coordinating:

- The organization of community workshops on the tourism industry;
- Provision of information on tourism projects taking place in specific communities or regions; and,
- Support for opportunity-based tourism development initiatives identified by a community in their CED plan.

#### **Strategic Outcomes:**

- [Capacity within partner organizations to carry out their roles and responsibilities under the strategy effective coordination of tourism development planning and implementation](#)

#### **Action: Enhance Capacity of Tourism Development Agencies for Implementation of the Strategy**

Two lead agencies, the Department of Economic Development & Transportation and Nunavut Tourism, will require additional capacity in order to effectively implement the strategy.

The Department of ED&T currently has three headquarters positions responsible for tourism within the Tourism and Cultural Industries Division, as well as four regional staff with tourism responsibilities. Full staffing of existing positions, a review of job descriptions, and the enhancement of the tourism responsibilities of up to five positions will be considered. These permanent, full-time positions include:

- Product Development Officer, by 2013-14: HQ position, working with regional staff; implementing actions in the strategy and working with the Manager of Tourism Development (ED&T) on strategic development of products and services; working with operators, communities, and other tourism industry partners; and serving as Secretariat to the Tourism Task Force for Nunavut.
- Four Tourism Officers, by 2015-16: to consolidate capacity within the regional Community Operations Divisions, these staff will have enhanced responsibility for working on implementation and enforcement of the *Travel and Tourism Act* and regulations, and coordinating enforcement activities with personnel of other tourism regulatory agencies; supporting Tourism Operators in meeting legislative and regulatory requirements and with general tourism development initiatives.

The implementation of the strategy requires two new positions within Nunavut Tourism. New, full-time positions at Nunavut Tourism include:

- Marketing Officer: Conference and Meeting Attraction, by 2013-14: responsible for marketing Nunavut for conferences, meetings, and special events.
- Tourism Training Coordinator, by 2014-15: responsible for supporting training in relation to tourism development initiatives, and serving as Secretariat to Tourism Training Group for Nunavut.

The positions in Nunavut Tourism will require additional funding from the Government of Nunavut in addition to the base core funding provided under the Government of Nunavut-Nunavut Tourism Contribution Agreement. The Tourism Training Group for Nunavut will include representatives of organizations involved in tourism training, and will be coordinated by Nunavut Tourism.



*Mariano Aupilardjuk and his wife Marie Tulimaaq.  
Photo Courtesy of Lee Narraway*

#### **Action: Re-establish the Tourism Task Force for Nunavut**

The Tourism Task Force for Nunavut (TTFN) will serve as an advisory group on issues facing the tourism industry, providing recommendations on measures identified in the strategy. The TTFN will be re-established by 2013-14, and provided a mandate based on the strategic goals of *Tunngasaiji*. Its members will include the territorial and federal government agencies involved in tourism development, Inuit organizations, and Nunavut Tourism. It is recommended that the TTFN be recognized by the Minister of Economic Development & Transportation as an advisory body, and supported by the GN Department of ED&T through its Product Development Officer.

TTFN's mandate will include coordination with other agencies whose mandates impact on tourism development (including, Transport Canada, the Canadian Coast Guard, and the Canadian Ice Service).

#### **Action: Establish a Tourism Training Group for Nunavut**

The Tourism Training Group for Nunavut will be established by 2014-15 to coordinate planning and implementation of measures to meet training needs within the tourism sector. The training group will include representatives of organizations involved in tourism training. It will be mandated to provide strategic direction and advice on the strategy's Pillar for Education and Training, including:

- Identification of targets for capacity development;
- Review of training needs assessments;
- Recommendation of courses or modules to meet needs;
- Support for development of curriculum, training modules and training tools;
- Support for coordinated planning and delivery.

The Training Group will be organized by Nunavut Tourism. Its Tourism Training Coordinator will act as Secretariat to the group.

#### **Action: Hold Tourism Conferences every three Years**

Building on the success of the major tourism conference held in Iqaluit in 2012, a second tourism conference should be held in the territory by 2016-17. Nunavut's tourism stakeholders will gather to discuss and review key themes addressed in the strategy, to consider industry trends and developments, and to determine how best to build on the foundation created by *Tunngasaiji*.

Conferences should be held in Iqaluit or in another regional centre every three years following the conference in 2016-17.

## Pillar: Attractions, Products and Services

### Strategic Objectives:

To increase visitation and tourism revenues through opportunity-based and coordinated tourism development initiatives

To increase the number of Nunavut-owned market-ready, high-quality attractions, products and services available

To ensure Inuit participation in the tourism industry at representative levels

The success of the tourism sector will depend on the quality and number of attractions offered by our tourism industry in our communities, on the land, and along our coastlines.

Tourism attractions, products and services exist in communities across the territory; the quantity and quality of these products and services varies however from location to location. If Nunavut is to succeed as a destination of choice among travellers, our attractions, services and products must meet or exceed the standards of our domestic and international competitors, while retaining the qualities that make Nunavut a unique destination, including our Inuit culture and Arctic land.

Each of these three elements is addressed in this strategy:

- **Attractions**, which are destinations and places of interest that provide opportunities for a traveller to engage in a recreational, cultural, educational or economic experience. Attractions in Nunavut include our communities, territorial and national parks and historic places, conservation areas, museums and arts centres, visitor centres, festivals, meetings and conferences, and opportunities for volunteer tourism.

- **Tourism services**, which are actions that assist travellers. In Nunavut, tourism services include

accommodations, restaurants, outfitters, visitor information portals (websites, visitor information centres, community visitor liaison people), and transportation services that range from airlines and cruise ships right down to a local taxi.

- **Tourism products, which are** activities or items that travellers can purchase. In Nunavut, tourism products include guided activities such as hunting and fishing trips, community tours, floe edge and marine coastal tours, cruise packages, cultural events, or educational experiences. The arts and crafts sector produces carvings, sewn products, and other cultural objects. Products in Nunavut's tourism sector are sold by both Nunavut-based and southern-based tourism operators.

The strategy promotes increased benefits from tourism in Nunavut by increasing the number of businesses and jobs, supporting existing and new Inuit-owned operations and other Nunavut-owned businesses, and fostering growth through stronger relationships between southern-based or international wholesalers and investors and Nunavummiut.

### Strategic Outcomes:

- **Strengthened sectoral planning, management and communication through collection and reporting of tourism sector data**

#### Action: Establish a Tourism Research and Statistics Coordination Role

Accurate data on tourism sector attractions, products and services is essential for understanding the state of the tourism sector, planning for development, and measuring the success of the strategy. Such data will include up-to-date information on:

- Market segments;
- Visitation levels and points of origin;
- Revenues to tourism sector attractions, products and services;

- Types of travellers and their spending;
- Market trends in Nunavut, Canada and internationally; and,
- Tourism businesses and employment in the tourism industry.

Beginning in 2013-14, the Tourism and Cultural Industries Division (TCI) of the GN Department of ED&T will coordinate tourism sector research and statistical information for the territory. Collecting data from partner organizations and tourism operators, ED&T will organize assessment and analysis through the Nunavut Bureau of Statistics to evaluate market potential, trends, opportunities, and to monitor the impact of the Strategy. The GN Department of ED&T will work with partners through the Tourism Task Force for Nunavut to:

- Establish a shared set of tourism definitions;
- Study and prepare recommendations on data collection requirements;
- Develop agreements on data sharing; and
- Identify opportunities for collaboration in data collection and research on existing and potential markets.

TCI will take a lead, in conjunction with partner agencies and with the direct support of the Nunavut Bureau of Statistics, to establish baseline data related to outcomes and indicators identified with *Tunngasaiji*. This will complement data collected in 2014-15 through the Nunavut visitor exit survey, and allow TCI to ensure by 2014-15 that specific, measurable targets have been identified for all indicators related to the strategy's objectives and outcomes. With the support of the Nunavut Bureau of Statistics, TCI will coordinate subsequent collection, analysis and reporting of tourism data required for tracking and measuring progress in the implementation of the tourism strategy.

### Action: Enhance Tourism Surveying and Reporting

Several organizations are currently conducting tourism surveys and reporting on travellers in Nunavut. TCI, as lead on the tourism research and data coordination, will work with these partner organizations to increase consistency in the way data is collected and interpreted.

- The GN Department of ED&T will work with the Nunavut Bureau of Statistics and the Canadian Tourism Commission in 2013-14 to develop recommendations on consistent and complementary methodologies for tourism surveying and reporting in Nunavut, in consultation with partner organizations;
- The GN Department of ED&T will identify data to be collected from tourism operators and establishments through the licensing system under the renewed *Travel and Tourism Act*, to be included in the regulations in 2014-15. Consultations with stakeholders on the regulations will identify parameters for data collection to begin in 2015-16;
- The GN Department of ED&T will conduct mini-surveys and market studies in non-visitor exit survey years to gather data on specific sectors of tourism market such as sport hunting, soft adventure tourism, or cruise ships;
- Nunavut Tourism will receive an addition to its base core funding to conduct an enhanced Nunavut Visitor Exit Survey in 2014 and 2017 using an expanded sample and time period (April to November);
- Nunavut Tourism will continue and expand its annual Conversion Study assessing how effectively potential visitor interest in Nunavut is converted into actual bookings;
- Parks Canada will continue to conduct visitor registration/deregistration interviews with visitors to national parks;

- GN Parks and Special Places will expand its current visitor registration/deregistration data collection to all territorial parks starting in 2014-15;

- The GN Department of ED&T will coordinate publication of a *State of Tourism in Nunavut* report through the Tourism Task Force for Nunavut, as an evaluation report to be produced in 2017-18 and subsequently at the end of every five-year planning period.

#### Strategic Outcomes:

- Increased visitation through development and enhancement of attractions in all regions

Nunavut's many attractions draw travellers to the territory and create opportunities for the sale of products and services. The strategy establishes a collaborative framework to enhance existing attractions and identify potential new ones.

#### Action: Identify Opportunities for Development of Key Attractions

The identification and assessment of opportunities for investment in the development of major new attractions within Nunavut will be critical for implementation of *Tunngasaiji*. This will require collaboration among tourism stakeholders at all levels, including communities, tourism operators and Community Economic Development Officers, RIAs and Regional Inuit CEDOs, Nunavut Tourism, GN Parks, GN Departments of Economic Development & Transportation and Culture and Heritage. The Tourism Task Force for Nunavut will play a central role in coordinating the identification of key projects early in the five-year implementation period and in encouraging cooperation in the development and implementation of plans for the development of key attractions, which may include, for example, the proposed Nunavut Heritage Centre or potential visitor/interpretive centres as key attractions in Clyde River, Gjoa Haven or Cape Dorset.

**Action: Invest in parks, conservation areas, historic places, heritage rivers, and other attractions in all regions of the territory.**

Capital investment and operational funding for ongoing operation and enhancement of existing attractions will



continue to be provided in all regions of the territory through the activities of various tourism partner agencies. Opportunities with demonstrated potential to increase tourism benefits in our communities through the development of associated products and services will be given priority.

- Parks Canada will continue to invest in park establishment and park development, including:
  - Potential establishment of Bathurst Island National Parks in 2013-14, and potential establishment of Lancaster Sound National Marine Park by 2017-18
  - The GN Territorial Parks and Special Places will continue its capital and infrastructure investments in all regions, including:
    - Potential investment in a territorial park north of Clyde River,
    - Potential investment in new territorial parks at Axel Heiberg Island, Sanikiluaq, Arviat, and Kugaaruk.
    - Potential investment in Canadian Heritage Rivers adjacent to communities of Kugluktuk, Gjoa Haven and Baker Lake.
  - The GN Department of ED&T will continue investment support for development of community attractions and community enhancement projects.
  - Nunavut Tunngavik Inc. and the Regional Inuit Associations will continue current investment under existing IIBAs for national and territorial parks and conservation areas in and around adjacent communities in all regions. There is also potential for further development associated with renewal of National Park and Conservation Area IIBAs, and implementation of IIBAs for territorial parks and Canadian heritage rivers.

• Visitor centres and interpretive centres will continue to receive funding for operations, for enhancement, and for establishment of proposed visitor centres from agencies mandated to operate visitor centres. These include municipalities, the GN Department of ED&T, Nunavut Tourism, Parks Canada, GN Territorial Parks, and other organizations identified through memoranda of understanding.

#### **Action: Support the Development and Promotion of Special Event Attractions**

Special events, including performing arts, cultural programs, festivals, tournaments, educational events, and volunteer tourism projects attract travellers to Nunavut. Community EDOs will take the lead in identifying special events and seeking funding and support for event planning and development.

Funding and development support for special event planning, implementation and promotion in communities, as well as to address associated infrastructure requirements, will be provided through economic and business development programs offered by the GN Department of ED&T and CanNor and other business development funding agencies, with additional support provided through the Regional Chambers of Commerce. The GN Department of ED&T will provide development support through the Product Development Officer. Nunavut Tourism will provide marketing support through its Marketing Officer.

Collaboration among communities and key agencies in planning, implementation and promotion of special events will start in 2014-15 and continue annually.

#### **Action: Promote Conferences and Meetings in Gateway and other Nunavut Communities.**

Conferences and other large-scale meetings account for a growing segment of the traveller market in Nunavut, providing opportunities for revenue from accommodation, transportation, tours, and sales of goods.

Nunavut Tourism, through its Marketing Officer,

Conference and Meeting Attraction will promote Nunavut's gateway communities as venues for conferences and larger-scale meetings to organizations outside of the territory. Other communities in the territory will be promoted for smaller scale events. Add-on tours within the conference community and to other communities will be promoted to maximize the economic benefits of these events.

Funding and development support for conference and meeting planning, implementation and promotion in communities, as well as to address associated infrastructure requirements, will be provided through economic and business development programs offered by ED&T and CanNor, and by other business development funding agencies, with additional support provided through the Regional Chambers of Commerce.

#### **Strategic Outcomes:**

- Increased traveller expenditures on market-ready tourism products and services
- Increased Inuit and Nunavut-owned and operated tourism businesses
- Increased Inuit and Nunavummiut employment in tourism activities

Tourism is a global market and Nunavut operators are competing with attractions, products and services from around the world. The strategy will strengthen Nunavut's competitive edge by increasing the supply and quality of market-ready travel products and services, emphasizing linkages between products, services and key attractions.

Increasing the number of Inuit and Nunavut-owned tourism businesses will provide greater benefits and higher economic return to Inuit beneficiaries and to Nunavummiut generally, and will contribute to achieving the overall vision of the strategy.

### Action: Prepare and Implement Product and Service Development Initiatives

In order to achieve the targets in tourism revenue set in *Tunngasaiji*, the tourism sector must increase the number of top-quality, market-ready products available to travellers. Opportunities include:

- Development of products associated with specific key attractions;
- Day trips, short tours, and add-on trips to other communities;
- Expansion of the season or market for current destinations and activities.

The development of new products is a complex, collaborative process, requiring product identification and development, business planning, training, infrastructure development, equipment purchase, initial business operations, and marketing assistance. Each stakeholder will contribute to the process:

- The Tourism Task Force for Nunavut, working with regional Tourism Officers and Community EDOs, will provide a forum for coordination by bringing together key tourism development, marketing, educational, business development, and financing agencies.
- The GN Department of ED&T will take a lead in the process of product and service development; the Product Development Officer will provide coordination and support in all regions to individual entrepreneurs, private businesses, communities, Regional Chambers of Commerce, government agencies and Inuit organizations.
- NTI and the RIAs currently manage tourism development funds associated with National Parks, conservation areas, and territorial parks IIBAs. These funds can provide resources for coordinated planning for communities named in the agreements, enabling Inuit tourism operators to develop market-ready products and services, and promoting the establishment of Inuit-owned tourism businesses and increased Inuit employment in the tourism industry.

### Action: Provide Business Support Services to Tourism Operators

Small business operators in Nunavut – whether working in tourism or in other sectors – often find it difficult to establish the fundamental financial, management and administrative tools any business requires for success. The strategy will assist operators by helping to build that foundational capacity in critical areas that include:

- Business organizational development;
- Market studies;
- Business planning;
- Financial management and bookkeeping.

These are needs shared by most small businesses in Nunavut. The strategy also provides for access to adequate aftercare services to help new businesses after the crucial start-up phase, as they develop and solidify their client base and services. Tourism business planning will recognize the longer timeframe required in many cases for establishment of new tourism products and services, given infrastructure and large-scale equipment requirements and for building a solid marketing network and client base.

In some cases, establishment of a broader community-based tourism business may provide a more sustainable model for tourism development, and business planning assistance will be required to assist communities in the establishment and operation of such organizations.

Community EDOs and the Regional Inuit CEDOs will be key in linking community tourism businesses to business support and business aftercare services. Financing for aftercare support will be available through proposal-driven applications from economic development funding agencies.

### **Action: Prepare and Implement a Cruise Ship and Yacht Management Plan.**

The GN Department of ED&T, in coordination with its *Tunngasaiji* partners, will take the lead in developing a Cruise Ship and Yacht Management Plan to help communities assess the potential benefits of cruise ships and yachts, and prepare products and services to serve this emerging market. The management plan will reflect regulations and policies developed through legislative and regulatory initiatives in 2013-15.

The plan will also address the need to communicate rules and protocols for travel in Nunavut waters to the cruise industry and international yachting community.

### **Action: Establish Occupational Standards for Tourism Operators and Employees**

Potential travellers want assurance that their experience in Nunavut, or any destination, will be of the highest possible quality. This strategy sets out two approaches for ensuring that travellers can choose Nunavut with confidence. The first will be the formal licensing of tourism operators that meet the regulations and requirements of the *Travel and Tourism Act*; the second will be the adoption of recognised set of occupational standards for workers in the tourism sector.

Starting in 2013-14 Nunavut Tourism will work with members and partner agencies to implement and promote the Canadian Tourism Human Resource Council (CTHRC) tourism industry standards, training and voluntary certification for tourism operators and employees.

### **Action: Branding and Marketing**

One broad goal of marketing and branding activities under *Tunngasaiji* is to acquaint actual and potential travellers with the quality tourism attractions, products and services in Nunavut, resulting in sales, repeat visitations, and recommendations. The strategy clarifies the roles of the principal organizations engaged in the sector.

- Under the *2010 Nunavut Tourism Sector Development Strategy*, the Department of Economic Development & Transportation is responsible for marketing the territory, coordinating with partner organizations that hold a marketing function, and providing additional funding to partner organizations for marketing through project specific, proposal driven applications.<sup>18</sup> The GN's Department of ED&T will provide the lead on a major branding exercise, in conjunction with Nunavut Tourism, Parks Canada, GN Parks, and other partner organizations, to develop and implement a consistent brand for the territory.

- Nunavut Tourism, the territory's industry tourism association, will have lead responsibility for destination branding and marketing and member marketing support. Nunavut Tourism will collaborate with other agencies to continue current marketing initiatives for existing attractions, products and services, and for investment in marketing of new products as these are developed, providing information on the Nunavut Tourism website and through other marketing tools.

- Destination and member marketing activities by Nunavut Tourism will require financial support from the Department of Economic Development & Transportation through potential program funding or through core funding in addition to the base core funding, as well as potential program funding from CanNor.

- Parks Canada and GN Territorial Parks and Special Places will continue to market parks, coordinated with ED&T and Nunavut Tourism, and through the Tourism Task Force for Nunavut.

- Communities with high tourism potential will be encouraged to consider specific marketing projects with applications for funding support to ED& T and/or CanNor, Regional Inuit CEDOs, and business development financing agencies.

## Pillar: Education and Training in Tourism

### Strategic Objective:

To provide a full range of tourism education and training programs to meet the needs of tourism operators, tourism industry employees, and communities in Nunavut

A recurring theme in this strategy is the need to increase the number of Nunavut and Inuit companies and individuals involved in tourism. To achieve that, the tourism sector must be supported by education and training that create and sustain a service-oriented, professional labour force. These programs must prepare Nunavut operators and employees to plan, manage and market their goods and services to the highest possible standards for an international client base, with courses and resources that reflect the realities of Nunavut.

### Strategic Outcome:

- Stronger linkages between tourism operator and employee needs and available training and education resources

#### Action: Conduct a Tourism Skills Inventory and Needs Assessment

The first step in meeting the training needs within any sector is to determine exactly what those needs are. *Tunngasaiji* will address the needs of the tourism sector strategically, in two stages.

- A **skills inventory** will define the skills, knowledge and attitudes required for positions with the Nunavut tourism industry, and determine the extent to which they are reflected in the current labour force;
- A **needs assessment**, based on the skills inventory, this strategy's objectives, and operator priorities, will identify the gap between current level of skills, knowledge and attitude in the labour force and the industry's actual needs. This critical information will help set priorities for development and implementation

of the education and training elements of *Tunngasaiji*, and provide a baseline of information for evaluating sectoral capacity.

The tourism skills inventory and needs assessment will be prepared in 2013-14 by ED&T.

### Strategic Outcome:

- Increased post-secondary tourism education opportunities for Inuit and Nunavummiut

#### Action: Deliver a Nunavut Arctic College (NAC) Tourism Diploma Program

Nunavut Arctic College has developed a two-year Tourism Diploma program, with support from CanNor, Nunavut tourism, Government of Nunavut and other agencies. Developed in collaboration with Lakehead University, the program may allow students to continue to complete a university tourism degree. The program will be oriented to graduates of grade 12 who wish to develop a career in the tourism industry.

It is essential that this program receive the required funding to:

- Complete final development of the year two curriculum for the Tourism Diploma Program by 2013-14;
- Deliver a pilot version of the diploma program at the Iqaluit NAC campus in 2013-14 and 2014-15;
- Establish the business case for core funding to operate the Diploma Program as an ongoing college program by 2015-16, offered at the NAC Iqaluit campus, and expanding program delivery to a second campus by 2017-2018.

### Strategic Outcome:

- Increased viability and sustainability of tourism operations based on enhanced knowledge and skills of tourism operators and employees

- Greater client service orientation and delivery of industry standard services in tourism operations and establishments

#### **Action: Provide modular tourism training courses for delivery in communities**

Community-based modular training will develop the skills and knowledge of both local tourism operators and those considering careers in or related to the industry.

- Guide level one, Wilderness First Aid, and Recreational Fishing Guide Training will be available for delivery in communities as of 2013-14, along with modules from the Nunavut Arctic College diploma program.
- Modules for Guide Level two (Interpretation), Fishing Guide, and Guide Level three (Tourism Business Management) will be updated or developed for delivery starting in 2014-2015.
- Funds will be provided for “Train the Trainer” courses to ensure qualified trainers are available, with an emphasis of development of Inuit trainers, as well as others with extensive, specialized tourism experience; the Train the Trainer modules will be offered in 2013-14 and 2015-16.

Nunavut Tourism and the Tourism Training Group for Nunavut will take the lead in establishing a tourism training schedule for Nunavut communities. Partner organizations (NAC, ED&T, Culture and Heritage, Regional Inuit CEDOs, Parks Canada, Inuit Heritage Trust, and others) will support content development, program design and community-based training; several are currently providing training in areas such as cruise workshops, tourism product development and programming, cultural interpretation, and visitor interaction.

#### **Action: Promote Tourism Occupational Career Training**

The tourism industry demands a high standard of customer-focused service from all businesses and agencies providing products to travellers – airlines,

hotel, restaurants, taxis, visitor centres, and other tourism-related organizations.

*The Canadian Tourism Human Resource Council (CTHRC)* offers training for tourism service occupations (hotel front desk, dining room service, housekeeper, etc.). Courses are offered by the CTHRC online or through workbooks, and through community-based delivery supported by GN ED&T and Nunavut Arctic College.

CTHRC programs are based on industry-defined standards, and promote development of a skilled labour force, and improved quality of service. CTHRC certification can be provided in our communities through an agent recognized by the CTHRC (e.g. a school principal).

These courses will be marketed to tourism operators by Nunavut Tourism annually starting in 2014-15, and will be included in the criteria for an industry standards program (linking to the *Attractions, Products and Services Pillar*).

Funding for promotion of CTHRC tourism industry courses will be provided from 2013-14 to 2017-18. Starting in 2013-14, funding for incremental translation of CTHRC course materials will be provided for three years.

#### **Action: Training for Community Economic Development Officers (EDOs)**

In order to work effectively with Community Economic Development Plans and tourism operators, Economic Development Officers must understand the principles and approaches underlying tourism development, programs and funding, and training.

Tourism-related training for EDOs will be provided annually by ED&T and Nunavut Tourism at annual meetings (such as the NEDA AGM). These sessions will increase EDO awareness of the tourism sector, familiarize them with tourism programs and funding, and enable them to assist the community in implementing tourism development goals.

## Moving Forward

Nunavummiut have known for decades that tourism represents both an essential contribution to our economy and a celebration of our culture and people.

Through strategic actions, partnerships, and community involvement, *Tungasaiji: A Tourism Strategy for Nunavut* sets a path to a future where tourism is a contributor to a vibrant and sustainable Nunavut economy.

The strategy is just the first along this path. Its implementation will be challenging; it will call for real commitment from all stakeholders – the Government of Nunavut, NTI, the RIAs, the Government of Canada, our communities, our industry members, and Nunavut Tourism. It will also require the commitment of new resources.

These resource and planning needs will be further defined and addressed through implementation and updating of the Tourism Strategy Action Plan by all tourism stakeholders under the lead of the Department of Economic Development & Transportation.



Photo Courtesy of Michelle Valberg

## Appendix: Five-Year Strategic Action Plan

### PILLAR 1: LEGISLATION AND REGULATION

**Strategic Objective:** To enact a new *Travel and Tourism Act* and associated regulations to guide development of the tourism industry and support implementation of *Tunngasaiji*

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Enact Legislation</b>	Lead: GN ED&T Support: GN Justice, NTI and RIAs, GoC Coordination: Other GN and GoC Regulators	<ul style="list-style-type: none"> <li>2013-14: Consultation and initial drafting</li> <li>2014-15: Final passage of legislation</li> </ul>	<ul style="list-style-type: none"> <li>Consultations: \$300,000 (GN)</li> <li>Legal Drafting: \$50,000 per year over two years (GN)</li> </ul>	<ul style="list-style-type: none"> <li>Travel and Tourism Act in place by March 2015</li> <li>Renewed, Nunavut-oriented legislative framework supporting tourism development</li> </ul>
<b>Review and Develop Regulations and Policies</b>	Lead: GN ED&T Support: GN Justice, NTI and RIAs, GoC Coordination: Other GN and GoC Regulators	<ul style="list-style-type: none"> <li>2013-15: Consultation and drafting of regulations and policies</li> <li>2015-16: Completion, approval and implementation of regulations and policies</li> </ul>		<ul style="list-style-type: none"> <li>Revised regulations and policies in place by March 2016</li> <li>Clear, streamlined, accessible licensing system</li> </ul>
<b>Increase Awareness of Acts and Regulations</b>	Lead: GN ED&T Support: NT, GN ED&T Regional Offices Coordination: Other GN and GoC Regulators	<ul style="list-style-type: none"> <li>2015-2017: Information marketing campaign through websites, print ads, regional workshops, presentations at trade shows and AGMs; communications packages to communities</li> </ul>	<ul style="list-style-type: none"> <li>\$100,000 per year over two years (GN)</li> <li>GN ED&amp;T internal O&amp;M resources, and participation of GN and federal agency staff</li> <li>GN ED&amp;T, Regional Inuit CEDOs: attendance of operators at trade shows</li> </ul>	<ul style="list-style-type: none"> <li>One workshop delivered annually in each region</li> <li>Increased understanding by tourism operators of tourism-related acts and regulations</li> </ul>

## Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Enforce Tourism-Related Acts and Regulations</b>	Lead: GN ED&T through Regional Tourism Officers Support: Other GN and GoC regulators, NT, Tourism Task Force for Nunavut	<ul style="list-style-type: none"> <li>• 2015-17: Regional Tourism Officers conduct inspections in cooperation with GN and federal regulators</li> <li>• Information exchange through TTFN, NT and Federal Council</li> <li>• Provide regional office with documents to implement changes and updates</li> </ul>	<ul style="list-style-type: none"> <li>• Organizational O&amp;M</li> </ul>	<ul style="list-style-type: none"> <li>• Zero tolerance for non-licensed tourism operations</li> <li>• Increase in number of new tourism operations and tourism licence renewals annually</li> <li>• Decrease in number of reports of unlicensed operators</li> <li>• Increased assurance of traveller health and safety; enhanced reputation of Nunavut as destination for safe, quality tourism experiences</li> </ul>
<b>Support Tourism Operators and Establishments in Meeting Legislated Requirements</b>	Lead: GN ED&T through Regional Tourism Officers Support: Other GN and GoC regulators, NT	<ul style="list-style-type: none"> <li>• 2015-17: Regional Tourism Officers provide single point of contact in each region to assist tourism operators.</li> </ul>	<ul style="list-style-type: none"> <li>• \$100,000 per year over two years (GN)</li> <li>• GN ED&amp;T internal O&amp;M resources, and participation of GN and federal agency staff</li> <li>• GN ED&amp;T, Regional Inuit CEDOs: attendance of operators at trade shows</li> </ul>	<ul style="list-style-type: none"> <li>• Greater ability of tourism operators to comply with legal and regulatory requirements</li> </ul>

## Appendix: Five-Year Strategic Action Plan

### PILLAR 2: PARTNERSHIPS

**Strategic Objective:** To engage communities in tourism planning and development, and to establish a framework for coordination and communication among all tourism stakeholders

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Community Economic Development Planning</b>	Lead: Municipalities Support: GN ED&T Regions and Community EDOs, Regional Inuit CEDOs	<ul style="list-style-type: none"> <li>2013-18: Community economic development plans prepared for each community on a five-year cycle, including, depending on interest and priorities of community, planning for community tourism development</li> </ul>	<ul style="list-style-type: none"> <li>Municipalities, GN ED&amp;T programs, Regional Inuit CEDOs</li> </ul>	<ul style="list-style-type: none"> <li>A community economic development plan as the basis for identification of feasible tourism development opportunities in communities interested in tourism development</li> <li>Communities are active in the planning and implementation of tourism development</li> </ul>
<b>Support Community Tourism Readiness Activities</b>	Lead: TTFN, Municipalities, RIAs, GN ED&T, Parks Canada	<ul style="list-style-type: none"> <li>2013-2018: Development and delivery of community readiness workshop (general and cruise ship specific); implementation of community workshop results, potentially including community beautification and signage</li> </ul>	<ul style="list-style-type: none"> <li>Readiness workshops: \$75,000 annually (CanNor, GN ED&amp;T, RIAs, Municipalities)</li> <li>Parks Canada (delivery of workshops)</li> </ul>	<ul style="list-style-type: none"> <li>Delivery of up to five community workshops annually</li> <li>Increased community understanding of requirements for tourism development; improvements in community appearance and accessibility for travellers</li> </ul>

## Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Enhance Capacity of Tourism Development Agencies</b>	Lead: GN ED&T and NT	<ul style="list-style-type: none"> <li>• 2013-14: GN ED&amp;T establish Product Development Officer position; NT establish Marketing Officer: Conference and Meeting Attraction position</li> <li>• 2014-15: NT establish Tourism Training Coordinator position</li> <li>• 2015-16: GN ED&amp;T enhance the capacity of four regional positions, including dedicated responsibilities for enforcement/tourism development.</li> </ul>	<ul style="list-style-type: none"> <li>• NT: Additional funding under GN Contribution Agreement of \$130,000 for Marketing Officer (starting 2013) and \$132,600 for Training Coordinator (starting 2014)</li> </ul>	<ul style="list-style-type: none"> <li>• Tourism organizations have adequate capacity to carry out roles and responsibilities for implementation of <i>Tunngasaiji</i>:</li> <li>• GN ED&amp;T has capacity to implement enforcement and tourism development role under Pillar 1 and product development role under Pillar 3</li> <li>• NT has capacity to implement marketing role under Pillar 3 and training support role under Pillar 4</li> </ul>
<b>Re-establish the Tourism Task Force for Nunavut (TTFN)</b>	Lead: GN ED&T through Product Development Officer as Secretariat  Participation: GN ED&T, GN Parks, GN Culture and Heritage, NT, NTI, Parks Canada, NAC, Regional Inuit CEDOs, IHT, CanNor	<ul style="list-style-type: none"> <li>• 2013-14: Re-establish and re-organize TTFN; recognition by Minister of ED&amp;T of TTFN as advisory body</li> </ul>	<ul style="list-style-type: none"> <li>• Organizational O&amp;M</li> </ul>	<ul style="list-style-type: none"> <li>• Revitalization of TTFN to coordinate implementation of Pillar 3</li> <li>• Effective coordination of tourism development planning and implementation</li> </ul>

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Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
Establish a Tourism Training Group for Nunavut (TTGN)	Lead: NT Tourism Training Coordinator as Secretariat Participation: GN ED&T, GN Parks, GN Culture and Heritage, IHT, Parks Canada, NT, NTL, Regional Inuit CEDOs, CanNor, NAC, CTHRC	<ul style="list-style-type: none"><li>• 2014-15: Establish TTGN</li></ul>	<ul style="list-style-type: none"><li>• Organizational O&amp;M</li></ul>	<ul style="list-style-type: none"><li>• Coordinated approach to implementation of training initiatives in support of tourism development goals of <i>Tunngasaiji</i></li></ul>
Hold Tourism Conferences Every Three Years	Lead: NT	<ul style="list-style-type: none"><li>• 2015-16: Organize major tourism conference to review progress on key themes of <i>Tunngasaiji</i>, in Iqaluit or other regional centre</li></ul>	<ul style="list-style-type: none"><li>• \$300,000 if held in Iqaluit (CanNor); budget would have to increase if held in another regional centre</li></ul>	<ul style="list-style-type: none"><li>• Renewed buy-in by industry stakeholders to <i>Tunngasaiji</i> based on participatory review and recommendations of conference on strategy</li></ul>

PILLAR 3: ATTRACTIONS, PRODUCTS AND SERVICES

**Strategic Objectives:**To increase visitation and tourism revenues through opportunity-based, coordinated tourism development initiatives

To increase the number of Nunavut-owned market-ready, high-quality attractions, products and services available

To ensure Inuit participation in the tourism industry at representative levels

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
Establish a Tourism Research and Statistics Coordination Role	Lead: GN ED&T and Nunavut Bureau of Statistics Support: TTFN, CTC, GoC	• 2013-14: conduct a tourism data coordination study to identify requirements, sources, consistency and reporting; establish tourism data coordination role in ED&T TCI, with analysis and reporting to be provided by NBS	• \$60,000 for data coordination study (GN, CanNor)	<ul style="list-style-type: none"><li>• Collection of baseline and annual data to measure growth in:</li><li>• Total tourism revenue</li><li>• Air passenger volumes and number of travellers</li><li>• Traveller expenditures, total and by market segment Number of tourism related businesses, total and Inuit-owned</li><li>• Tourism-related employment, total and Inuit</li><li>• Consistent measurement and reporting of progress on implementation of <i>Tunngasaiji</i></li></ul>

## Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Enhance Surveying and Reporting</b>	Lead: GN ED&T, NT, Parks Canada, GN Parks Support: NBS, CTC	<ul style="list-style-type: none"> <li>GN ED&amp;T: Tourism visitor data collected annually from licensed operators through licensing system starting 2015-16; summary <i>State of Tourism Report</i> prepared 2017-18</li> <li>NT: Expanded Nunavut Visitor Exit Survey conducted every three years; tourism conversion study annually</li> <li>Parks Canada: annual parks visitor interviews</li> <li>GN Parks: visitor data collect annually from all parks</li> </ul>	<ul style="list-style-type: none"> <li>NT: Exit Survey \$300,000, 2014 and 2017 (CanNor)</li> <li>GN Parks: \$50,000 addition to O&amp;M for extended surveying in all territorial parks (GN)</li> <li>GN ED&amp;T: State of Tourism Report \$100,000 (2017-18)</li> <li>Other: Organizational O&amp;M</li> </ul>	<ul style="list-style-type: none"> <li>Consistent and complementary tourism data from key source is available for tourism planning, monitoring and reporting</li> </ul>
<b>Identify Opportunities for Development of Key Attractions</b>	Lead: Tourism Task Force for Nunavut Support: Municipalities, Community EDOs, RIAs/Inuit Regional CEDOs, NT, GN ED&T, GN Parks, GN Culture and Heritage, IHT, Parks Canada	<ul style="list-style-type: none"> <li>2013-18: Collaboration in the identification, assessment of opportunities for development major new attractions, particularly in the initial years for implementation of the strategy</li> </ul>	<ul style="list-style-type: none"> <li>Organizational O&amp;M</li> </ul>	<ul style="list-style-type: none"> <li>Identification of specific development projects for key attractions as a basis for the implementation of collaborative project plans</li> <li>Increased visitation resulting from development and enhancement of attractions in all regions, as basis for development of tourism products and services</li> </ul>

Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
Invest in Parks, Conservation Areas, Historic Places, Heritage Rivers and Other Attractions	Lead: Communities, GN Parks, Parks Canada, GN ED&T, GN Culture and Heritage, NTI and RIAs	<ul style="list-style-type: none"><li>• Parks Canada: ongoing investment in park operations and park establishment and development</li><li>• Territorial Parks: park operations, capital infrastructure, and park development</li><li>• NTI, RIAs: current and proposed investment in attractions in and around communities adjacent to parks and conservation areas</li><li>• Communities, GN ED&amp;T: investment in operations, enhancement and development of community attractions, visitor centres and community enhancement</li><li>• Operation of gateway visitor centres by NT</li></ul>	<ul style="list-style-type: none"><li>• Potential opportunity-driven investment managed by various tourism stakeholders in attractions in Nunavut communities including communities adjacent to parks and conservation areas (PC, CWS, CanNor, GN Parks, GN ED&amp;T, NTI, RIAs, Heritage Canada, GN Culture and Heritage)</li><li>• Gateway visitor centres: continued NT core funding under GN-NT Contribution Agreement</li></ul>	<ul style="list-style-type: none"><li>• Specific targets for visitation will be set by organizations managing attractions based on collection of baseline visitation data</li><li>• Increased visitation resulting from development and enhancement of attractions in all regions, as basis for development of tourism products and services</li></ul>

## Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Support and Promote Special Event Attractions</b>	<p>Lead: Communities and Community EDOs, GN ED&amp;T, GN Culture and Heritage, NT</p> <p>Support: Regional Chambers of Commerce</p>	<ul style="list-style-type: none"> <li>• \$250,000 annually from program funding (Municipalities, GN ED&amp;T, CanNor)</li> </ul>	<ul style="list-style-type: none"> <li>• NT: exit survey \$300,000, 2014 and 2017 (CanNor)</li> <li>• GN Parks: \$50,000 addition to O&amp;M for extended surveying in all territorial parks (GN)</li> <li>• GN ED&amp;T: State of Tourism Report \$100,000 (2017-18)</li> <li>• Other: Organizational O&amp;M</li> </ul>	<ul style="list-style-type: none"> <li>• Increase in number of community special event attractions; target to be based on review of baseline data</li> <li>• Increased ability of communities and community organizations to undertake special event initiatives</li> </ul>
<b>Promote Conferences and Meetings in Gateway and Other Communities</b>	<p>Lead: NT through Marketing Officer</p> <p>Support: GN ED&amp;T, Regional Chambers of Commerce</p>	<ul style="list-style-type: none"> <li>• Promotional activities to organizations outside Nunavut to hold conferences and meetings in Nunavut</li> <li>• Promotion of add-on tourism products and services</li> </ul>	<ul style="list-style-type: none"> <li>• Organizational O&amp;M</li> </ul>	<ul style="list-style-type: none"> <li>• Increase in conferences and meetings held in gateway and other communities: target to be based on review of baseline data</li> <li>• Increased number of add-on tourism products and services directed at business travellers, and increased revenue to tourism operators from the business market</li> </ul>

## Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Prepare and Implement Product and Service Development Initiatives</b>	<p>Lead: Communities, Tourism Operators, GN ED&amp;T, Regional Inuit CEDOs</p> <p>Support: NT, GN Parks, Parks Canada, TTFN</p>	<ul style="list-style-type: none"> <li>• Prepare and implement coordinated project and services development plans for community tourism development, and for increased participation of Inuit tourism operators</li> </ul>	<ul style="list-style-type: none"> <li>• Potential opportunity driven investment in tourism product and services developed, including associated infrastructure (business development agency grants, contributions and loan financing, GN ED&amp;T, CanNor, RIAs)</li> </ul>	<ul style="list-style-type: none"> <li>• Increase in number of quality, market-ready tourism products and services</li> <li>• Targets to be set on collection and review of baseline data for:</li> <li>• Increase in Nunavummiut and Inuit owned tourism businesses</li> <li>• Increase in employment of Nunavummiut and Inuit in tourism industry</li> <li>• Establishment of a Nunavut-based inbound tour operator</li> <li>• 23% increase in total traveller spending in Nunavut from 2013 to 2018</li> </ul>
<b>Provide Business Support Services to Tourism Operators</b>	<p>Lead: Community EDOs, Regional Inuit CEDOs, Nunavut Business Development Agencies, GN ED&amp;T</p> <p>Support: TTFN</p>	<ul style="list-style-type: none"> <li>• 2013-2018: Investment funding identified with business support programs for business development support services and aftercare support services as complementary part of coordinated planning and implementation of community tourism development projects (Pillar 3)</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity and proponent driven applications to business development agencies for grants, contributions and debt financing (GN ED&amp;T, Regional Inuit CEDOs, Community Futures, ABC, NBCC, Atuqtuavik)</li> </ul>	<ul style="list-style-type: none"> <li>• Tourism operators have access to essential business support services</li> <li>• Increased viability and sustainability of community tourism businesses</li> </ul>

## Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Prepare and Implement a Cruise Ship and Yacht Management Plan</b>	Lead: GN ED&T Support: Communities, NT, Cruise Ship industry, Yacht associations, TTFN	<ul style="list-style-type: none"> <li>• 2014-15: Preparation of Cruise Ship and Yacht Management Plan (assessment of costs and benefits, recommendations to increase community benefits, implementation plan)</li> <li>• 2015-2018: Implementation of Management Plan</li> </ul>	<ul style="list-style-type: none"> <li>• Management Plan \$80,000 (CanNor)</li> <li>• Investment in implementation to be determined in Management Plan</li> </ul>	<ul style="list-style-type: none"> <li>• Increased income to communities and community members through potential landing fees, provision of services, sale of arts and crafts</li> <li>• Improved relationship with communities from more effective management of cruise ships and yachts</li> <li>• Greater awareness of cruise and yacht owners and operators of regulations and licensing requirements</li> </ul>
<b>Establish Occupational Standards for Tourism Operators and Employees</b>	Lead: Tourism operators, NT, TTGN Support: GN ED&T, CTHRC	<ul style="list-style-type: none"> <li>• 2014-2018: Promotion of CTHRC courses; voluntary certification by tourism operators and employees</li> </ul>	<ul style="list-style-type: none"> <li>• See Pillar 4 Education and Training below</li> </ul>	<ul style="list-style-type: none"> <li>• Tourism operators and employees voluntarily achieving certification; targets for voluntary certification to be established by NT in consultation with membership</li> <li>• Enhanced image and reputation for Nunavut as a travel destination: travellers in Nunavut experience a more professional, service-oriented delivery of tourism services and products</li> </ul>

Appendix: Five-Year Strategic Action Plan

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
Branding and Marketing	Lead: Communities, Tourism operators, Parks Canada, GN Parks, GN ED&T, NT  Support: TTFN	<ul style="list-style-type: none"><li>• 2013-2018: Branding and marketing of the territory to establish a consistent Nunavut brand (GN ED&amp;T); marketing of communities and community attractions; marketing of national and territorial parks (PC, GN Parks); destination branding and marketing and member marketing of existing and new quality attractions, products and services (NT)</li></ul>	<ul style="list-style-type: none"><li>• Organizational O&amp;M and program funding (Municipalities, PC, GN Parks, GN ED&amp;T) ;</li><li>• Destination and member marketing activities: \$600,000 annually based on average levels of previous investment (CanNor, GN ED&amp;T program funding or addition to core funding under GN-NT Contribution Agreement)</li></ul>	<ul style="list-style-type: none"><li>• Increased tourism demand for travel to Nunavut and increased conversion rates for potential travellers; specific targets to be established through initial research and baseline data, coordinated by TTFN</li><li>• Achievement of 23% increase in total expenditures by travellers in Nunavut by 2018</li></ul>

## Appendix: Five-Year Strategic Action Plan

### PILLAR 4: EDUCATION AND TRAINING

**Strategic Objective:** To provide a full range of tourism education and training programs to meet the needs of tourism operators, tourism industry employees and communities in Nunavut

Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Conduct a Tourism Skills Inventory and Needs Assessment</b>	Lead: GN ED&T Support: NT, TTGN	<ul style="list-style-type: none"> <li>2013-14: complete tourism skills inventory and needs assessment to identify training needs, resources and establish priorities</li> </ul>	<ul style="list-style-type: none"> <li>\$80,000 (CanNor)</li> </ul>	<ul style="list-style-type: none"> <li>Training needs of community tourism outfitters, operators, service providers identified and prioritized by March 2014</li> <li>Stronger linkages between tourism operator/employee needs and available education and training resources</li> </ul>
<b>Deliver a Nunavut Arctic College Tourism Diploma Program</b>	Lead: NAC Support: TTGN	<ul style="list-style-type: none"> <li>2013-15: Complete development of two year Tourism Diploma Program curriculum; commence pilot delivery at Iqaluit campus; develop business case for core funding of program</li> <li>2015-18: If approved, operate as core NAC program, Iqaluit campus 2015-18, and at second campus location by 2017-18</li> </ul>	<ul style="list-style-type: none"> <li>\$300,000 (final development, equipment purchase and pilot operation, 2013-14 - GN)</li> <li>\$200,000 (operation Iqaluit campus, 2014-18 - GN)</li> <li>\$300,000 (additional funding for operation at second campus location, 2017-18 - GN)</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of Tourism Diploma Program as core NAC program</li> <li>Targets of intake and completion rates, and employment rates for program graduates in tourism related-jobs to be established as part of NAC program planning</li> <li>Increased entry of younger, educated Inuit and Nunavummiut into the tourism industry</li> </ul>

## Appendix: Five-Year Strategic Action Plan

	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
<b>Provide Modular Training for Delivery in Communities</b>	Lead: NT, NAC (2013-14); TTGN (2014-15 to 2017-18) Support: Communities, GN ED&T, Parks Canada, NT, NAC, GN Culture and Heritage, IHT	<ul style="list-style-type: none"> <li>• 2013-15: Update final program modules as required (Guide Level two and three, Fishing guide); train the trainer to establish community training delivery capacity; delivery of up to 10 modules annually in three regions based on needs assessment, opportunity identification, and delivery capacity</li> <li>• 2015-18: Train the Trainer; delivery of up to 12 modules annually in three regions, depending on delivery capacity</li> </ul>	<ul style="list-style-type: none"> <li>• Module updates \$60,000 (2013-14), \$40,000 (2014-15)</li> <li>• Train the trainer \$80,000 (2013-14), \$40,000 (2015-16)</li> <li>• Potential delivery of community modules \$300,000 annually 2013-15, \$360,000 annually 2016-18</li> <li>• Potential sources of investment: GN ED&amp;T programs, RIAs/Regional Inuit CEDOs, CanNor, IHT, GN Culture and Heritage, Municipalities</li> <li>• Parks Canada (personnel for delivery of modules)</li> </ul>	<ul style="list-style-type: none"> <li>• Delivery of up to 12 community modules per year in three regions</li> <li>• Increased viability and sustainability of tourism operations based on enhanced knowledge and skills of tourism operators and employees</li> </ul>
<b>Promote Tourism Occupational Career Training</b>	Lead: TTGN Support: CTHRC, GN ED&T, NAC	<ul style="list-style-type: none"> <li>• 2013-14: Incremental translation of CTHRC course materials as required</li> <li>• 2013-18: promotion of CTHRC tourism industry courses and certification (delivery online and through community workbooks)</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing and incremental translation \$100,000 2013-14; \$50,000 annually 2014-18 (CanNor Heritage, Municipalities)</li> <li>• Parks Canada (personnel for delivery of modules)</li> </ul>	<ul style="list-style-type: none"> <li>• Certification of tourism operators and employees; targets to be established as part of the implementation of the program</li> <li>• Greater client service orientation and delivery of industry standard services in tourism operations</li> </ul>

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Action	Roles	Timeframe	Potential Resources	Success Indicators/Outcomes
Training for Community Economic Development Officers	Lead: GN ED&T Support: Communities; TTGN, NT	<ul style="list-style-type: none"><li>2013-18: training annually of Community EDOs at NEDA meetings</li></ul>	<ul style="list-style-type: none"><li>Internal O&amp;M resources for delivery at NEDA meetings</li></ul>	<ul style="list-style-type: none"><li>At least one Community EDO training workshop at each NEDA meeting</li><li>Increased capacity of Community EDOs to support tourism development at the community level</li></ul>

## Acronyms

<b>CanNor</b>	Canadian Northern Economic Development Agency
<b>CEDO</b>	Community Economic Development Organization
<b>CTC</b>	Canadian Tourism Commission
<b>CTHRC</b>	Canadian Tourism Human Resource Council
<b>EDO</b>	Economic Development Officer
<b>GN ED&amp;T</b>	Government of Nunavut's Department of Economic Development & Transportation
<b>GN Parks</b>	Government of Nunavut's Department of Environment, Parks and Special Places Division
<b>GoC</b>	Government of Canada
<b>IHT</b>	Inuit Heritage Trust
<b>NAC</b>	Nunavut Arctic College
<b>NBS</b>	Nunavut Bureau of Statistics
<b>NT</b>	Nunavut Tourism
<b>NTI</b>	Nunavut Tunngavik Inc.
<b>PC</b>	Parks Canada
<b>RIAs</b>	Regional Inuit Associations
<b>TCI</b>	Tourism and Cultural Industries Division, GN Department of Economic Development & Transportation
<b>TTFN</b>	Tourism Task Force for Nunavut
<b>TTGN</b>	Tourism Training Group for Nunavut

## Endnotes

- <sup>1</sup> Government of Canada, Canada's Federal Tourism Strategy 2010.
- <sup>2</sup> United Nations World Tourism Organization and United Nations Statistical Commission.
- <sup>3</sup> *2011 Nunavut Visitor Exit Survey*, p. 26. The report notes that the estimate is based on best available information and assumptions.
- <sup>4</sup> Nunavut Bureau of Statistics identifies tourism-related industries as accommodations, food, transportation, arts, entertainment, recreation, fishing, hunting, and trapping.
- <sup>5</sup> Nunavut Bureau of Statistics/Statistics Canada, CANSIM, table 384-0002.
- <sup>6</sup> *2010 Nunavut Economic Outlook*, p. 65.
- <sup>7</sup> *2011 Nunavut Visitor Exit Survey*, p. 26. The report notes that the estimate is based on best available information and assumptions.
- <sup>8</sup> Nunavut Bureau of Statistics identifies tourism-related industries as accommodations, food, transportation, arts, entertainment, recreation, fishing, hunting, and trapping.
- <sup>9</sup> Northwest Territories Tourism. *Northwest Territories Marketing Plan 2012-13*, p. 22.
- <sup>10</sup> *2011 Nunavut Visitor Exit Survey*, p. 9. The report notes that the exit survey did not include charters – the Kivalliq region includes a high number of charters for resource development that are not captured in the average spending. The report identifies the average spending among all Nunavut travellers to be \$2,663 (pg. 4), which is inconsistent with the regional averages. The report notes that the estimate is based on best available information and assumptions.
- <sup>11</sup> The *2011 Nunavut Visitor Exit Survey* report does not include an estimate of total number of travellers in 2011.
- <sup>12</sup> These figures include workers on construction and resource development projects, but do not capture repeated travel to the work site over the year.
- <sup>13</sup> Caution must be used with reference to revenues from sports fishing as these are based on data from fishing licence receipt books in each community, and may not be complete in all years.
- <sup>14</sup> Department of Economic Development & Transportation, Briefing Note: Overview of Tourism in Nunavut. May 2012. p. 2.
- <sup>15</sup> Outspan Group Inc. 2011. *The Economic Impact of Canada's National, Provincial and Territorial Parks in 2009* (Canadian Parks Council), Table 2, p. 13.
- <sup>16</sup> The *2011 Nunavut Visitor Exit Survey* report states that the number of cruise ship passengers in 2011 is an estimate using the average number of passengers per ship in 2006 and 2008.
- <sup>17</sup> Dawson, Jackie; Margaret Johnson; Emma Stewart. *Cruise Tourism in Arctic Canada*. 2011. University of Ottawa/Lakehead University. p. 2.
- <sup>18</sup> Department of Economic Development & Transportation, *Tourism Sector Development Strategy*. May 2010. p. 5.

