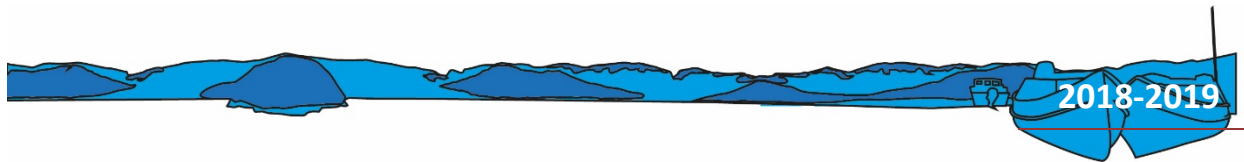


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## 1. Minister's Message



I am pleased to present the 2018/19 Annual Tourism Report for the Department of Economic Development and Transportation.

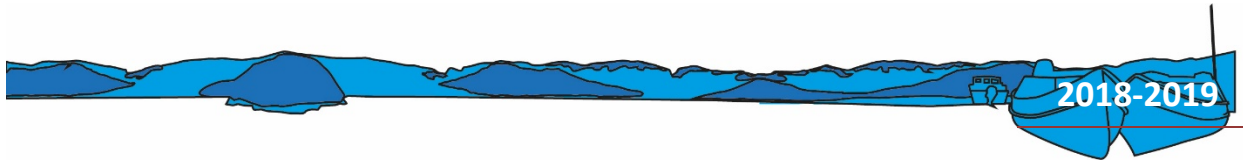
Tourism is an important component of Nunavut's economy. From Nunavut Visitor Exit Survey's pilot data, we are excited to share that 51,200 travelers visited the territory from outside Nunavut (including the rest of Canada and overseas) from April to September 2018. These visitors spent a total of \$271,383,000 during their travel. This figure includes transportation costs. Future iterations of the Visitor Exit Survey will separate transportation costs from other direct tourism and travel-related costs in the territory.

The department is committed to providing access to funding and training opportunities where they are most needed. During the 2018/19 fiscal year the department delivered nine different training programs to Inuit in remote communities, to staff in municipal offices, to owners and employees of small- and medium-sized tourism businesses, and to government employees in the department's regional offices. Through the Community Tourism and Cultural Industries funding program, the department distributed \$1,272,822 in support of Nunavut-based municipalities, societies, business, artists, and artists' organizations, with a further \$325,125 distributed through our Strategic Investments Program.

Marine tourism is a steadily growing sector in the industry. In 2018 Nunavut received 3,404 cruise tourists over a two-and-a-half month period. Cruise operators spent \$388,351 to access community services that include tours, performances and logistics support for their passengers. Expedition cruise vessels create significant business opportunities for Nunavummiut in remote communities, especially in the High Arctic and along the Northwest Passage. In recognition of this the department is working with the Association of Arctic Expedition Cruise Operators and spearheading several development initiatives that tap directly into this uniquely renewable economic resource. These initiatives include the delivery of cruise training programs, increasing territorial oversight of the industry, introducing new marine tourism regulations, and developing a new multi-stakeholder territorial marine tourism management plan.

The department also markets the territory to high yield tourists. Destination Nunavut (DN) is the Government of Nunavut's tourism promotion and development arm and has been the territory's destination marketing organization (DMO) since 2016. Over the past year, DN has been working in



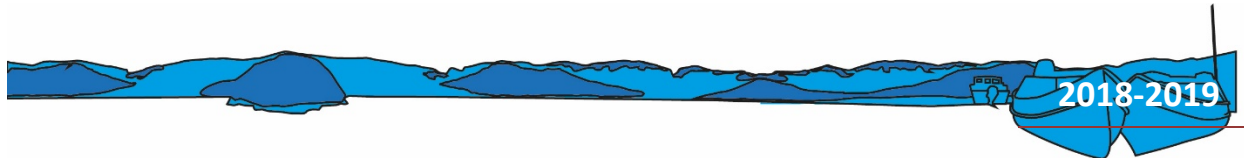


collaboration with Destination Canada and the Indigenous Tourism Association of Canada to increase Nunavut's presence and impact at domestic and international trade and media shows. DN also established an official website, launched online marketing campaigns, held a photography contest, organized a media tour, and received a significant growth of followers on social media accounts.

The department operates visitor centres in the territory's three regional gateway cities (Iqaluit, Rankin Inlet and Cambridge Bay) as well as in Pangnirtung. Visitor centre staff share historical information with tourists and travelers, feature prized Inuit artworks, and host special events and exhibitions. The visitor centres received steady visitor traffic throughout the year, especially during the summer and cruise seasons, with a total number of 11,649 domestic and international tourists.

The department continues to sustainably develop Nunavut's tourism sector in a way which ensures lasting benefits to Nunavummiut and fosters collaborative partnerships with territorial, national and international organizations to find innovative ways to increase the value of tourism. This report presents the department's tourism development actions during the 2018/19 fiscal year. The report includes a review of our initiatives, programs and regulations, marketing statistics and programs, and the exciting new results of the pilot Nunavut Visitor Exit Survey 2018.

The Honourable David Akeeagok  
Minister  
Economic Development and Transportation  
Government of Nunavut



## 2. Summary of Nunavut Visitor Exit Survey 2018 [Pilot]

The report provides an analysis of data collected for the Pilot Nunavut Visitor Exit Survey (VES) for the second and third quarters of 2018 and data on cruise voyages with stops in Nunavut for the third quarter of 2018. The pilot study employed a new methodological approach to determining visitation and spending in the territory that differs significantly from previous methods. This new methodology is being progressively modified and will be improved over time.

The department continues to collaborate with Statistics Canada to improve tourism statistics and more accurately approximate the economic value of Nunavut's tourism industry. Future iterations of the VES will be integrated into Statistics Canada's North Initiative project, which will create a statistical framework that reliably produces travel and tourism indicators for the three territories, the results of which will be produced within the Tourism Statistics Program at Statistics Canada starting in 2020.

### **Nunavut Visitors**

#### **Over two-thirds of visits in Nunavut are by Nunavummiut**

Canadian residents, including Nunavummiut (people who live in the territory of Nunavut), made 134,100 visits in Nunavut in the second and third quarters of 2018, spending \$476 million.

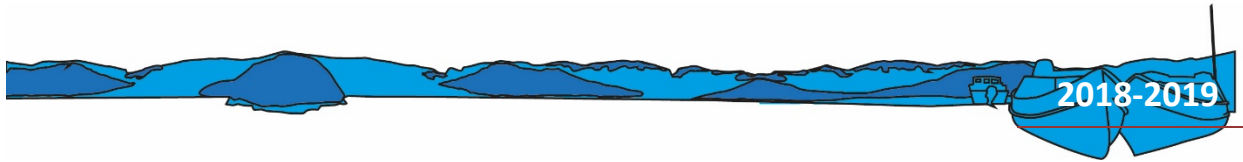
Over two-thirds (67.6%) of all visits by Canadian residents in Nunavut from April through September 2018 involved Nunavummiut traveling within their territory of residence (90,700 visits), spending about 54% of all travel expenses by Canadians in Nunavut. Average travel spending in Nunavut by Nunavummiut totalled \$2,800 per visit, including transportation costs.

Business was the main trip purpose for almost half of all trips by Nunavummiut (47.6%, 64,400 trips) within Nunavut, during these two quarters, followed by those who travelled for other personal reasons (32.9%) and for holiday, leisure or recreation (14%). Other personal reasons include to attend a non-business conference, convention or trade show, to shop, to go to school or to study, for a regular treatment or check-up, for other medical, dental or health reasons, for religious reasons, to pick up or drop off someone or something, to move to a new residence or to help others move, or to go to a funeral.

#### **Majority of Canadians (excluding Nunavummiut) visiting Nunavut are for business-related purposes**

Canadian residents from other provinces and territories made slightly under one-third (32.4% or 43,400 visits) of all visits to Nunavut by Canadians. These travellers, including travellers from abroad, spent \$219 million or 41.5% of the total for all visitor expenditures in the territory.

Residents of Ontario (14,200 visits) were the most frequent visitors and the largest spenders in Nunavut (\$76.1 million). Residents of Quebec (6,700 visits) and Manitoba (5,400 visits) were the next-largest visitor



groups, spending a total of \$57.7 million in the territory, or about one-quarter of total spending by non-Nunavut residents. Average travel spending in Nunavut by non-Nunavummiut Canadians was \$5,000 per visit, including transportation costs.

About 34,400 trips to Nunavut were for business-related purposes, accounting for 79.3% of trips by Canadian residents residing outside Nunavut. A smaller share of trips to Nunavut during these two quarters was for holiday, leisure or recreation (13.6%).

The top three activities that non-Nunavummiut Canadians participated in during their visit in Nunavut were sightseeing (56%), wildlife viewing or bird watching (36.7%), and dining out/going to a restaurant, bar or club (36.4%).

### **Visitors from abroad spent on average two times more per visit in Nunavut than Nunavummiut**

Visitors from outside of Canada took 7,800 visits to Nunavut (5.5% of all visits in Nunavut). They spent about \$52.4 million which accounted for 9.9% of total visitor spending in the territory. On average these travellers spent \$6,700 per visit, or about a quarter more than the average amount spent by Canadians from outside Nunavut. Visitors from abroad spent, on average, more than twice the amount spent by Nunavummiut travelling in the territory.

Holiday, leisure, or recreation was the main trip purpose for almost two-thirds (65.4%) of the trips taken by visitors from abroad.

Fishing was the activity that visitors from abroad most-frequently (75.8%) reported participating in during the second and third quarters of 2018.

### **Communities Visited**

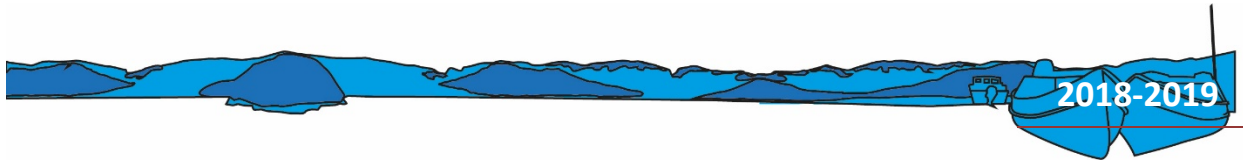
#### **Travel spending by all visitors was the highest in Iqaluit and Rankin Inlet**

Qikiqtaaluk (95,600 visits) and Kivalliq (84,400 visits) reported the largest numbers of visits in Nunavut. Within the Qikiqtaaluk region, just over half (53.2%) of all visits were to Iqaluit, the territorial capital. A total of \$75.1 million was spent in Iqaluit. Other communities most often visited within this region were Pond Inlet (10,900 visits), Pangnirtung (7,400 visits) and Igloodik (6,400 visits).

Rankin Inlet, at 33,600 visits and \$68 million in spending, was the community most visited within the Kivalliq region, followed by Baker Lake (16,500 visits) and Arviat (13,100 visits). Cambridge Bay was the most visited community in the Kitikmeot region, accounting for 12,400 visits in the region during these two quarters.

### **Nunavut Experience**





Overall, all visitors to Nunavut (both Canadians residing outside Nunavut and foreign) gave their travel experience in Nunavut very positive ratings. Virtually all visitors (99.8%) who compared their trip experience to their expectations indicated that the trip either met or exceeded their expectations.

About eight out of 10 visitors rated their overall experience in Nunavut as excellent or good. The lowest rated aspect was value for money. Overall, 57.7% of visitors identified overall trip cost as an area for future improvement.

Few visitors to Nunavut (7%) identified desired activities that were missing from their trip, while nearly all (98.6%) said that they would like to visit Nunavut again.

### **Cruise Voyage Visits in Nunavut**

Weather and ice conditions affected half of the planned cruise voyages.

A total of eight cruise operators provided data for 23 voyages that stopped in Nunavut from July to September 2018. These cruises contained a total of 3,404 passengers and produced \$388,351 in direct spending in communities by cruise operators. This figure does not include cruise passenger spending. The department piloted a Cruise Exit Survey in Cambridge Bay, Pond Inlet and Iqaluit during the 2019 season and will provide passenger spending figures in future iterations of the Visitor Exit Survey. Among the 23 voyages in 2018, cruise operators planned 59 community visits. Of these, 56% or 33 visits took place as scheduled, and 22% or 13 were replaced by visits to alternate communities due to weather conditions, bringing the total to 46 actual community visits.

A little over half (59%) of the passengers in the sample who disembarked in Nunavut communities visited Pond Inlet. This was followed by Iqaluit (8.3%), Qikiqtarjuaq (6.1%) and Grise Fiord (5.9%). The remaining 22% of planned visits did not take place and were not replaced with visits to alternate communities. This impacted the communities of Cambridge Bay, Gjoa Haven, Kimmirut and Kugluktuk the hardest, as they did not receive any cruise ship passenger visits in 2018, though both Cambridge Bay and Gjoa Haven were expecting seven visits. The total value of pre-trip estimated spending by cruise operators compared to post-trip actual spending represented an increase of about \$12,335 or 3.18% of total spending.

For more details about the results request the Pilot Visitor Exit Survey 2018.

### 3. Tourism Development Initiatives and Programs

The Tourism and Cultural Industries (TCI) division was created in 2010 to centralize tourism governance and development in the territory. Departmental staff work with territorial organizations and industry stakeholders to develop strong and renewable tourism and cultural sectors in the territory. The TCI division is composed of four separate branches:

- Destination Nunavut, the territory's destination marketing organization;
- Visitor Experience, responsible for the management of four visitor centres;
- Tourism Development, responsible for training, program development and funding support for tourism businesses and organizations; and
- Cultural Industries, which provides direct program support for artists and arts organizations.

#### 3.1 The *Nunavut Tourism Act*

The department regulates tourism businesses under the authority of the *Nunavut Tourism Act* and regulations. Where required, the department issues an Outfitter's Licence and the Wilderness Tourism Establishment Licence to tourism businesses. In 2018 the department's tourism database listed 114 separate tourism operations licensed or regulated under the Act. This includes hotels, lodges, bed and breakfasts, outpost camps, outfitters, cruise ships, and private vessels from outside of Nunavut. For an up-to-date list of tourism businesses please visit <https://www.gov.nu.ca/edt/operators>.

No official investigations under the Tourism Act were undertaken in 2018.

Outfitter's Licence		
4660 Nunavut Ltd.	Outfitter	Gjoa Haven
Akademik Ioffe, One Ocean Expeditions Inc.	Outfitter	Cambridge Bay, Pangnirtung, Pond Inlet, Qikiqtarjuaq, Resolute Bay, Iqaluit
Akademik Ioffe, One Ocean Expeditions Inc.	Outfitter	Pangnirtung, Pond Inlet, Qikiqtarjuaq, Resolute Bay, Iqaluit, Grise Fiord, Arctic Bay
Akademik Sergey Vavilov, One Ocean Expeditions Inc.	Outfitter	Cambridge Bay, Pangnirtung, Qikiqtarjuaq, Iqaluit
Alivaktuk Outfitting	Outfitter	Pangnirtung
ArcTech Design and Services	Outfitter	Rankin Inlet
Arctic Bay Adventures	Outfitter	Arctic Bay
Arctic Haven Wilderness Lodge	Outfitter	Arviat
Arctic Kingdom	Outfitter	Iqaluit
Arctic Tours	Outfitter	Iqaluit
Arctic Watch Lodge	Outfitter	Resolute, Clyde River

Arctic Wilderness Guiding & Outfitting	Outfitter	Naujaat
Baffin Safari	Outfitter	Pond Inlet, Clyde River
Bathurst Inlet Developments (1984) LTD	Outfitter	Cambridge Bay, Kugluktuk
Bathurst Inlet Lodge LTD.	Outfitter	Cambridge Bay, Kugluktuk
Black Feather	Outfitter	Kugluktuk, Pangnirtung, Pond Inlet, Kimmirut, Resolute Bay, Grise Fiord
Ekaluktutiak Sports Hunt Ltd./Ellis River/Cape Peel/Wellington Bay	Outfitter	Cambridge Bay
Henik Lake Adventures	Outfitter	Arviat
Huit Huit Tours Ltd.	Outfitter	Cape Dorset
Igloo Tourism and Outfitting	Outfitter	Igloolik
Inukpak Outfitting	Outfitter	Iqaluit
Inukshuk Adventures Ltd.	Outfitter	Iqaluit
Kasba Lake Lodge	Outfitter	Arviat
Kimberley's Outfitters and Tourism	Outfitter	Gjoa Haven
Koda Adventure Tours	Outfitter	Kugluktuk
Kool Runnings Inc.	Outfitter	Iqaluit
Le Boreal, Abercrombie & Kent	Outfitter	Gjoa Haven, Pond Inlet
Le Soleal, Ponant	Outfitter	Gjoa Haven, Qikiqtarjuaq, Iqaluit, Arctic Bay, Clyde River
MV Fram, Hurtigruten	Outfitter	Cambridge Bay, Gjoa Haven, Pond Inlet
MV Hanseatic, Hapag-Lloyd	Outfitter	
MV Silver Cloud, Silversea Cruises	Outfitter	Pond Inlet, Kimmirut, Iqaluit, Cape Dorset
Nahanni Wilderness Adventures	Outfitter	Kugluktuk, Baker Lake
National Geographic Explorer, Lindblad Expeditions	Outfitter	Pond Inlet
NorthWinds Arctic Adventures Limited	Outfitter	Iqaluit
Nunavut Experience Outfitting	Outfitter	Qikiqtarjuaq
Nuttuituq Outfitting	Outfitter	Pond Inlet, Arctic Bay, Clyde River
Ocean Adventurer, Quark Expeditions	Outfitter	Pangnirtung, Pond Inlet, Qikiqtarjuaq, Resolute Bay
Ocean Endeavour, Adventure Canada	Outfitter	Gjoa Haven, Kugluktuk, Pond Inlet, Qikiqtarjuaq, Resolute Bay, Grise Fiord
PEO Services	Outfitter	Pangnirtung
Polar Ice Adventures Outfitting	Outfitter	Resolute
Polar Outfitting	Outfitter	Iqaluit
Seabourn Quest, Seabourn Cruise Line	Outfitter	Iqaluit
Siku Tours	Outfitter	Coral Harbour
Sinaa Tours	Outfitter	Iqaluit
Tagak Outfitting Services	Outfitter	Pond Inlet



<b>Tassiuq Outfitters</b>	Outfitter	Coral Harbour
<b>Tuktu Lodge LTD</b>	Outfitter	Baker Lake
<b>Wanapitei Canoe and Northern Outdoor Expeditions INC.</b>	Outfitter	Kugluktuk, Cambridge Bay
<b>Tourist Establishments</b>		
<b>Aarruja Development Corporation Qammaq Hotel</b>	Tourist Establishment	Clyde River
<b>Accommodations by the Sea</b>	Tourist Establishment	Iqaluit
<b>Amaulik Motel, Inns North</b>	Tourist Establishment	Sanikiluaq
<b>Amundsen Hotel</b>	Tourist Establishment	Gjoa Haven
<b>Apex Bed &amp; Breakfast</b>	Tourist Establishment	Iqaluit
<b>Arctic Haven Wilderness Lodge</b>	Tourist Establishment	Arviat
<b>Arctic Haven Wilderness Lodge - Outpost Cabin</b>	Tourist Establishment	Arviat
<b>Arctic Watch Wilderness Lodge</b>	Tourist Establishment	Resolute
<b>Atco Narwhal Airport Hotel</b>	Tourist Establishment	Resolute
<b>Atco South Camp Inn</b>	Tourist Establishment	Resolute
<b>B and B 360</b>	Tourist Establishment	Rankin Inlet
<b>Bathurst Inlet-Burnside River Outpost Camp</b>	Tourist Establishment	Kugluktuk
<b>Bathurst Inlet-Char Lake Outpost Camp</b>	Tourist Establishment	Cambridge Bay, Kugluktuk
<b>Bathurst Inlet-Contwoyto Lake Outpost Camp</b>	Tourist Establishment	Kugluktuk
<b>Bathurst Inlet-Fishing Creek Outpost Camp</b>	Tourist Establishment	Cambridge Bay
<b>Bathurst Inlet-Pellat Lake Outpost Camp</b>	Tourist Establishment	Kugluktuk
<b>Bathurst Inlet-Wilberforce Falls Outpost Camp</b>	Tourist Establishment	Cambridge Bay, Kugluktuk
<b>Beaches Bed &amp; Breakfast</b>	Tourist Establishment	Iqaluit
<b>Black Point Lodge Hotel</b>	Tourist Establishment	Pond Inlet
<b>Capital Suites</b>	Tourist Establishment	Iqaluit
<b>Complete Expeditions Inc.</b>	Tourist Establishment	Cambridge Bay, Gjoa Haven, Kugluktuk, Taloyoak, Pond Inlet, Resolute Bay, Grise Fiord, Arctic Bay
<b>Coppermine Inn</b>	Tourist Establishment	Kugluktuk
<b>Dorset Suites, Huit Huit Tours Ltd</b>	Tourist Establishment	Cape Dorset
<b>Enokhok Inn and Suites Cambridge Bay</b>	Tourist Establishment	Cambridge Bay
<b>Enokhok Inn and Suites Kugluktuk</b>	Tourist Establishment	Kugluktuk
<b>Frobisher Inn</b>	Tourist Establishment	Iqaluit
<b>Gjoa Haven Bed and Breakfast</b>	Tourist Establishment	Gjoa Haven
<b>Hakongak Outfitting</b>	Tourist Establishment	Cambridge Bay
<b>Grise Fiord Hotel</b>	Tourist Establishment	Grise Fiord
<b>Hall Beach Hotel, Inns North</b>	Tourist Establishment	Hall Beach

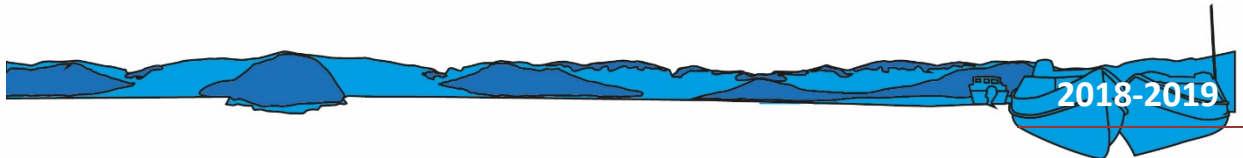
Henik Lake Adventures - Baralzon Lake Camp	Tourist Establishment	Arviat
Henik Lake Adventures - Edehon Lake Camp	Tourist Establishment	Arviat
Henik Lake Adventures - Henik Lake Camp	Tourist Establishment	Arviat
Henik Lake Adventures - Kuugluk Bear Camp	Tourist Establishment	Arviat
Henik Lake Adventures - Nueltin Lake Camp	Tourist Establishment	Arviat
High Arctic Lodge - Merkley Lake	Tourist Establishment	Cambridge Bay
Igloolik Inn, Inns North	Tourist Establishment	Igloolik
Illu Inc.	Tourist Establishment	Cambridge Bay
Inukshuk Inn	Tourist Establishment	Kugaaruk
Inukshuk Lodge	Tourist Establishment	Rankin Inlet
Kasba Lake Lodge	Tourist Establishment	Arviat
Katimavik Suites - Arviat	Tourist Establishment	Arviat
Katimavik Suites - Beach House	Tourist Establishment	Arviat
Katimavik Suites - Rankin Inlet	Tourist Establishment	Rankin Inlet
LRT Construction and Lodging	Tourist Establishment	Igloolik
Naujaaraaluit Hotel	Tourist Establishment	Clyde River
Naujat Hotel	Tourist Establishment	Naujaat
Nunamiut Lodge Hotel	Tourist Establishment	Baker Lake
Nunattaq Suites	Tourist Establishment	Iqaluit
Plummers Arctic Lodges	Tourist Establishment	Kugluktuk
Qausuittuq Hotel, Inns North	Tourist Establishment	Resolute
Qik Lodge	Tourist Establishment	Qikiqtarjuaq
Qillaq Lodge	Tourist Establishment	Cambridge Bay
RANNVAs Bed and Breakfast	Tourist Establishment	Iqaluit
Siniktarvik Hotel and Conference Center	Tourist Establishment	Rankin Inlet

### 3.2 Tourism Sector Training Program

Under Sivummuaqpalliajjutivut in the Government of Nunavut's Turaaqtavut mandate,

*"Nunavut's economy is continuing to diversify and Nunavummiut have increasing choice in employment. Despite these opportunities, the territory relies on imported labour and many Inuit are dependent on social assistance or under-employed. Improved access to local skills training and postsecondary education will enable self-reliance and employment."*

*...with a specific priority being: "Putting our communities first by offering local skills and trades training that will reduce our dependence on imported labour and support employment for people with disabilities."*



Nunavut's greatest resource is its people. The department continues to encourage Nunavummiut to participate in tourism-related opportunities through ensuring access to a comprehensive training regime which includes hospitality and business skills, on-the-land guiding, cruise expedition team training, survival and risk management skills, cultural interpretation skills, and more.

While tourism is an industry driven by private sector development it requires government support to flourish. This is particularly true with a destination such as Nunavut which faces many structural challenges. Prominent among these challenges is the absence of a suitable labour pool that is interested and trained in different elements of the tourism sector. Without a pool of trained, certified employees, opportunities in the tourism industry remain unrealized potential. Training has long been a recognized need for the tourism sector in Nunavut.

The department continues to deliver on the Government's mandate to provide Inuit and Nunavummiut with training needed for careers in the territory's tourism industry. The table below illustrates the frequency of the delivery of training programs since 2016. Each program requires a different degree of time investment, travel costs, trainee qualifications, instructors, and staffing resources. The table is a summary of the department's tourism training efforts and is meant to be illustrative only. The department is moving towards a consistent training delivery model that will incorporate all of the below programs.



Number of Tourism Sector Training Programs Delivered from 2016 to 2019 April		2016	2017	2018	2019 April
1	Wilderness First Aid	-	-	3	TBD
2	Small Vessel Operator Proficiency	2	2	-	TBD
3	Surface Ice Rescue Training	-	-	-	1
4	Cruise Ready! Community Preparedness Workshop	-	2	1	3
5	Nalunaiqsijit: Inuit Cruise Training Initiative	-	1	-	1
6	Inuit Tourism Business Mentorship Program	-	4*	3*	3*
7	Business Market Trade Ready	-	-	8**	1
8	Hospitality and Host Training Program (in development)	-	-	-	-
9	Government and Municipal Staff Training	Ongoing			
	Total	2	9	15	9

\*Numbers of Inuit-owned businesses supported

\*\*Including Travel Nunavut's delivery of the program

### 3.2.1. Wilderness First Aid

Wilderness First Aid (WFA) trains outfitters, guides and other individuals employed in the industry how to deal with emergency scenarios on the land. Historically, the program has been offered on an inconsistent basis by several different organizations. WFA is a nationally recognized certification for wilderness guides.

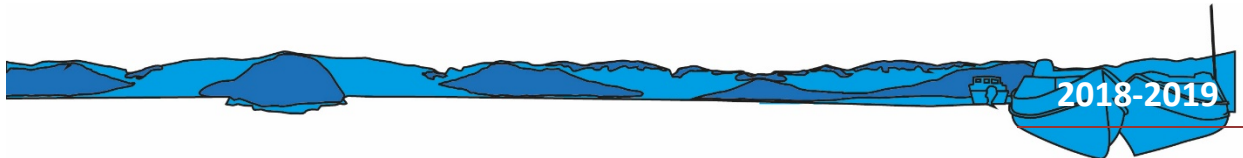
In 2018, the department secured a funding increase to aid in the delivery of up to three WFA workshops a year. As of April 2019, the department has delivered WFA once in Iqaluit and twice in Cambridge Bay with plans to deliver more courses in select communities in the future.

#### Outputs

- Increased emergency preparedness for tourism operators
- Increased safety for tourists
- Nunavut's industry better meets national guiding standards

### 3.2.2. Small Vessel Operator Proficiency

Small Vessel Operator Proficiency (SVOP) is a Transport Canada certification requirement for tourism operators to offer marine-based tourism activities. Transport Canada conducts inspections of boats, boat registry, and has historically sent federally trained instructors to deliver SVOP and Captain's Licence training on an inconsistent basis. However, Transport Canada recognizes that obtaining SVOP is particularly onerous and burdensome to Nunavummiut operators. In light of this, Transport Canada has



funded the Nunavut Fisheries Marine Training Consortium to deliver SVOP courses and other marine training in Nunavut's communities.

Between 2005/06 and 2015/16 the department provided about \$800,000 to the Nunavut Fisheries Marine Training Consortium (NFMTC) through the department's Strategic Investments Program. Using this and federal funding, NFMTC trained about 488 Nunavummiut in SVOP over ten years.

Travel Nunavut has been vocal about the need for SVOP training targeted specifically at tourism operators. In 2018 the department secured funding to deliver SVOP training every year in select communities. The department continues to collaborate with NFMTC and Transport Canada to deliver this training.

### **Outputs**

- Increased emergency preparedness for tourism operators
- Increased safety for tourists
- Transport Canada certification requirements are met
- Nunavut better meets national guiding standards

#### **3.2.3. Surface Ice Rescue Training**

The department continues to offer specialized tourism training on a case-by-case basis. The Surface Ice Rescue Training program in Pond Inlet was a huge success, with over twenty individuals receiving full-immersion ice rescue training.

### **Outputs**

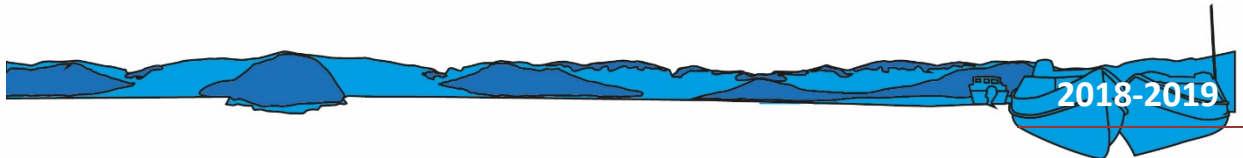
- Better safety for tourists
- Appropriate emergency preparedness for tourism operators with operations on or near the floe edge
- Contributes to the development of transferable skill sets for Inuit in Pond Inlet

#### **3.2.4 Cruise Ready! Community Preparedness Workshop**

In 2017 the GN developed a comprehensive manual for cruise preparedness workshops, based on best practices from similar destinations around the globe. This manual formed the basis for "Cruise Ready!" and serves as a guidance document for facilitation. The pilot workshop was delivered in Pond Inlet in 2017.

The program brings together community decision makers, outfitters, tour guides, performers, artists, entrepreneurs and more to discuss topics like community preparedness and planning, marketing, communication with the cruise industry, troubleshooting, customer service, product inventory, pricing, and more.

The development and delivery of this workshop meets deliverables outlined in the Nunavut Marine Tourism Management Plan (2016-2019).



## Outputs

- Community members gain a greater understanding of the cruise tourism industry
- Community members can better prepare in advance for cruise visits
- All relevant local stakeholders will have an opportunity to learn how to best maximize potential benefits from cruise ship visits
- Transparent local management systems for cruise visits put in place

### 3.2.5 Nalunaiqsijit: Inuit Cruise Training Initiative

Nalunaiqsijit means “to make it clear, to have no doubts” or, another way, “informers, connectors”. The department’s six-week holistic program trains 12 Inuit every year to work onboard cruise ships as expedition team members. The program includes a paid internship component.

Nalunaiqsijit: the Inuit Cruise Training Initiative is an innovative program designed to place Inuit onboard cruise vessels as expedition team staff. The program was piloted in 2017 in partnership with Parks Canada and Adventure Canada. The GN and Adventure Canada co-designed the pilot program with full funding and logistics support also provided by the GN. The 2019 program is a fully GN-led initiative, in partnership with the Nunavut Fisheries Marine Training Consortium.

The program has three basic components:

- Phase 1: Soft Skills training in Iqaluit in April
- Phase 2: Internship, which involves a paid mentorship onboard a cruise ship for one voyage during the Nunavut cruise season
- Phase 3: Hard Skills to receive further training in October at NFTMC’s facilities in Iqaluit.

During Phase 3: Hard Skills, participants obtain the certifications necessary to meet the International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (STCW), making them fully qualified to work onboard ships and other marine vessels.

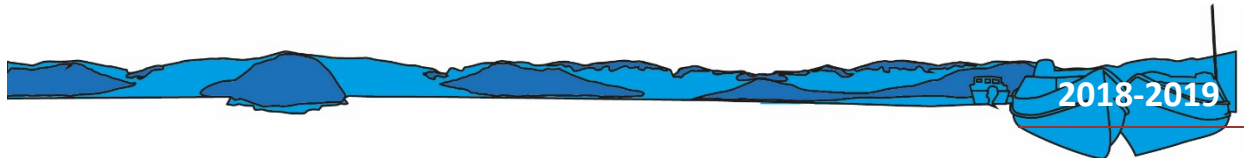
Four participants from the 2019 program will join Quark Expeditions in Antarctica in early 2020, while ten trainees will work onboard cruise ships in Nunavut and Greenland between in 2019.

The development and delivery of this workshop meets deliverables outlined in the Nunavut Marine Tourism Management Plan (2016-2019).

## Outputs

- An annual cohort of 12 Nunavummiut fully trained and qualified to meet international certification requirements for work on cruise ships
- Clear access point to a career path in cruise tourism
- Nunavummiut will have an opportunity to work on cruise ships that visit the territory
- Cruise operators have access to a clear and well-defined qualified pool of Nunavummiut





- Candidate profiles will be housed on the Cruise Nunavut website

### 3.2.6 Inuit Tourism Business Mentorship Program

The program was started in 2017 in partnership with the Indigenous Tourism Association of Canada (ITAC) to provide training and business opportunities for Inuit outfitters. It is aimed at increasing direct employment of the tourism sector and supporting Inuit outfitters in becoming market-ready and trade-ready through extensive exposure to domestic and international tourism marketplaces. Strategic priorities include:

- 1) Provide training and mentorship to support the growth of sustainable market-ready and trade-ready Inuit experiences
- 2) Increase awareness and generate demand for Inuit tourism in key domestic and international markets
- 3) Align strategies to leverage funding and maximize the effectiveness of development and marketing programs
- 4) Support the development of Inuit tourism products and experiences

#### Outputs

- Exposure at the territorial, national and international level for Inuit entrepreneurs
- Increased aftercare supports for Inuit businesses
- Increases access to national indigenous tourism networks
- Increased links with third-party tourism providers

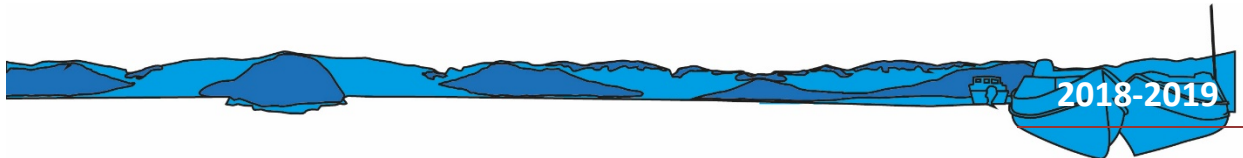
### 3.2.7 Business, Market, Trade Ready Program

The program is intended to help outfitters to administer their sales and develop policies that meet national service standards when selling tourism experiences. Business Ready refers to a business that has all of its licences, permits, and insurance in place in order to operate legally. Market Ready refers to selling directly to the consumer and Trade Ready refers to selling through third-party distribution sales channels to sell to even more clients.

The division, working with Travel Nunavut, offered in-person training sessions in eight different communities in 2018. Online free training is also available at <https://www.gov.nu.ca/edt/resources-tourism>

#### Outputs

- Business aftercare support for Inuit entrepreneurs
- Shared best business practices across the territories
- Increases access to national Indigenous tourism networks



- Increased links with third-party tourism providers

### 3.2.8 Hospitality and Host Training Program

Departmental staff met with industry representatives from Nunastar, Qikiqtaaluk Corporation, Government of Nunavut's Department of Family Services, Nunavut Arctic College and Northview in early 2019. The department is currently exploring options for the development of a Hospitality and Host Training program with a built-in coop opportunity that provides training for Inuit to enter the hospitality industry.

#### Outputs

- Increased awareness for employment in the hospitality industry
- Opportunity to gain direct experience in the hospitality industry
- Certifications can be used outside of the territory
- Increased employment opportunities for Inuit

### 3.2.9 Government and Municipal Staff Training

#### 3.2.9-1 Training in collaboration with Statistics Canada

Historically, tourism data collection in the territory has been weak, leading to uncertainty regarding the true size of the industry and its contributions to Nunavut's economy. The department continues to collaborate with Statistics Canada to train GN regional office staff, visitor centre staff and summer students to conduct surveys of travellers and visitors in the territory. These surveys include the Visitor Exit Survey (Biennial – piloted in 2018), the Air Exit Survey (Annual – piloted in 2019), and the Cruise Exit Survey (Annual – piloted in 2019).

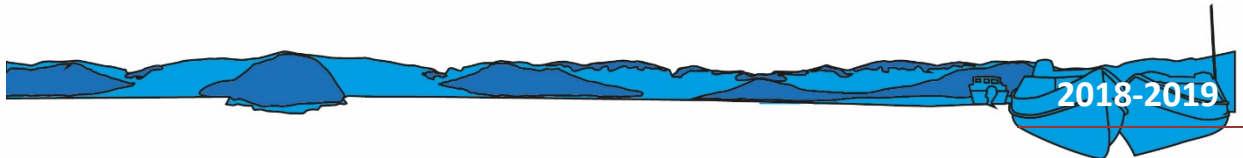
#### Outputs

- Opens up job opportunities for Inuit. Current GN surveyors are all Inuit
- Illustrates local and territorial impact of tourism
- Leverages Statistics Canada resources and expertise
- Standardized data collection system will allow the GN to better track tourism trends over time
- Allows for the concentration of tourism development and marketing efforts

#### 3.2.9-2 Tourism Officer Workshops

Select departmental regional office staff are appointed with duties as Tourism Officers, and for many this is their first time taking on a function as a regulatory official. At any given time, there are up to 14 Tourism Officers within the department.

Historically, the department delivered Tourism Officer Workshops on an inconsistent basis. This training ensures appropriate governance of the tourism sector. Tourism Officers are involved with licencing, enforcing, and inspecting tourism businesses under the *Tourism Act*. The workshop also covers updates



and considerations regarding department funding programs, including the dissemination of other operational information.

### Outputs

- GN staff understand and implement regulatory procedures under the *Tourism Act*
- More communication and collaboration between departmental headquarters and regional offices
- Team-building increased between GN staff with tourism responsibilities
- Increased awareness of GN tourism, funding and other initiatives

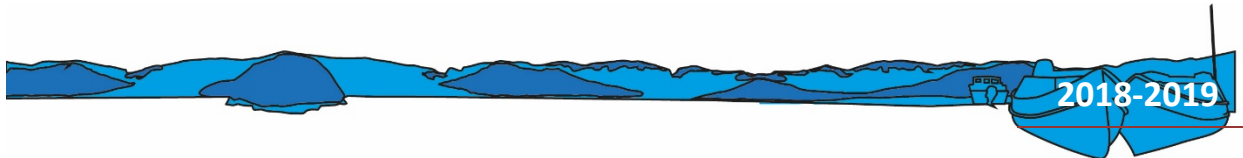
### 3.2.9-3 Visitor Centre and Heritage Centre Training

In 2016, the government took over responsibility from Nunavut Tourism for running the visitor centres in Iqaluit, Pangnirtung, Rankin Inlet, and Cambridge Bay. Combined, the staff sits at 14 and at 80% Inuit employment.

In the past, visitor centre staff in Iqaluit have conducted ad-hoc training for new visitor centre employees in other communities. The department continues to offer professional development and training opportunities to regional visitor centre staff.

### Outputs

- GN Visitor Centre staff trained in customer service
- GN Visitor Centre staff receive professional development training



### 3.3 Community Tourism and Cultural Industries Program

The Community Tourism and Cultural Industries (CTCI) program is designed to encourage diverse and sustainable economic growth through the responsible development of the tourism sector and cultural industries. It encourages and supports economic development initiatives that build on and add value to identified areas of potential, including the arts and tourism sectors, and also reinforces sustainable economic development for communities that showcase the strength and richness of Nunavut's natural wonders, wildlife, and people. This program is based on the following Inuit Societal Values and guiding principles:

- *Pijitsirniq*: (serving and providing for family and community) Self-reliance of individuals, families and communities will be enhanced by the development of the applicant's talents and skills. A sustainable community tourism and cultural industries sector is one that respects the environment and motivates youth – the future generation – to become involved with the community tourism and cultural industries sector.
- *Pilimmaksarniq/Pijariuqsarniq*: (development of skills through observation, mentoring, practice, and effort) Applicants will be empowered to develop their skills through practice, effort and action.
- *Piliriqatigiinniq/Ikajugtigiinniq*: (working together for a common cause) The growth of the community tourism and cultural industries sector depends on a shared mission and commitment between the department and stakeholders in the industry.
- *Aajiiqatigiinniq*: (decision making through discussion and consensus) Funding must complement existing funding structures and deliver effective support to the community tourism and cultural industries sector. The results of community tourism and cultural industries funding must be measured and reported in order to support future decision-making discussions.

Funding is available to Nunavut-based municipalities, societies, businesses, artists, and artists organizations. Applications are directed to regional offices and emphasis is placed on projects at the community level. The program has three separate schedules:

- **The Getting Started, Creation and Training Schedule (Schedule A)** supports the government's commitments to tourism and cultural industries related education and training in keeping with the guiding principle of *Pilimmaksarniq/Pijariuqsarniq* (development of skills through practice, effort and action). This schedule supports small businesses, individuals, organizations and municipalities that seek to start, build upon, or enhance their service delivery capacity or hone their artistic ability.
- **The Product Development and Marketing Schedule (Schedule B)** supports the department's commitment to developing Nunavut's arts, cultural and tourism sectors. This schedule provides

- **Infrastructure Improvements Schedule (Schedule C)** supports infrastructure development and will add value to the cultural and tourism sectors. Funding is targeted towards small businesses, artist studios, municipalities, and other organizations and will support community visitor centre improvements and the installation of public art displays.

### 3.3.1 Funding highlights for 2018-2019

**In 2018-2019 the program funded a total of 115 projects, totalling \$1,272,822**

**Nunatta Sunakkutaangit Museum – Voices of Nunavut Exhibition, \$50,100**

“ᐃᑲᑐᒻᓴᕋᔭᖅᑐᑦ Ꮝᐱᑦ (Voices from Nunavut), a two-year Signature Project celebrating Canada 150, is an exhibition of a 27-channel video installation. Twenty-seven videos representing all communities across the vast territory of Nunavut were created by a youth group in each community.....These exhibitions of ‘Voices from Nunavut’ were a great success, and enthusiastically received by the public in all venues: in Iqaluit, Whitehorse, Winnipeg, Ottawa, Toronto in 2017 and in early 2018 for the last stop (at) Canada House (in) London, England. Further interests for exhibition came from other countries as well including Norway and Greenland, if future traveling exhibition funds become available.”

~ *Nunatta Sunakkutaangit Museum*

**Jerry Cans Tour - \$48,383**

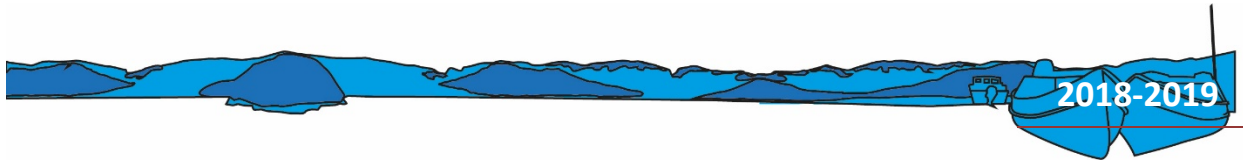
The department partially funded the Jerry Cans' tour through the United States and Canada. Since then, the band has been nominated for two Juno awards, performed at the Juno live broadcast to an audience of over two million viewers, and continued to develop the market for Inuktitut music across Canada and the world.

**Hamlet of Iglooklik, Creation of Iglooklik arts - \$81,785**

Igloodik is a very artistic community and extremely proud of their heritage. There are more artists in Igloodik per capita than any other place in Nunavut. At the moment, eight out of ten people in Igloodik are artists.

"We worked with local artist, held six workshops, teach them about safety, tools, ventilation and inspiration in regards to arts. We also selected two individual and travel to Winnipeg to the





Northern Exposure that took place in Winnipeg Art Gallery. We exhibit art from 32 individuals at this show.

We also hosted three artists Gatherings to discuss better support and initiatives to influence and support Art. Out of this came a platform to market artist and the community as an artistic and culture community. All together this allows us to sold (sic) over \$5,000 of Art and also have now set up 5 stores and 2 Galleries that we will be working with as channels to sell Igloolik Art. Over all 53 artists participated.”

### **Artcirq, Unikkaaqtuat Production – \$99,872**

Artcirq along with Les 7 doigts de la main and Taqqut Productions produced Unikkaaqtuat a major multidisciplinary production inspired by Inuit founding myths and illustrated by world-renowned artist Germaine Arnaktauyok.

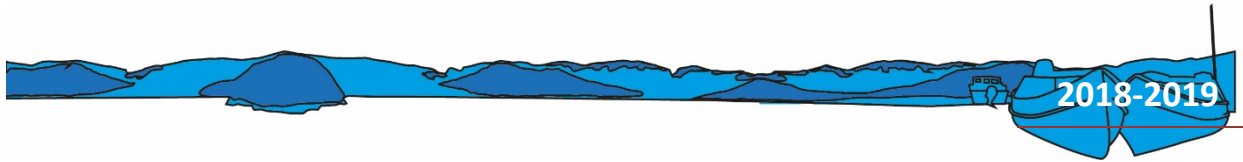
In order to promote this production for the benefit of Nunavut and its performing arts industry, Artcirq developed a marketing campaign integrating musical and video material with the support of experts in those fields.

### **Supported the Nunavut Development Corporation and the Winnipeg Art Gallery’s new store, the WAG @ Forks with \$225,000 over three years.**

The Nunavut Development Corporation (NDC) and the Winnipeg Art Gallery (WAG) entered into a three-year Project Funding Agreement in April 2016 to help support the opening of a new retail store called Wag@TheForks (WAF) whose core product lines include Inuit sculpture and other Nunavut-produced items such as sewn goods, prints, jewellery and crafts. The Department of Economic Development and Transportation and NDC entered into a corresponding three-year contribution agreement under which NDC is to receive a an annual contribution of up to \$75,000 to support the establishment of WAF by extending project funding to the WAG in accordance with NDC’s project funding guidelines.

### **3.3.2 Strategic Investments Program**

The department’s Strategic Investment Program offers assistance to businesses majority-owned by Nunavut residents, municipalities, not-for-profit corporations and societies. Under the program, businesses can apply for a contribution to cover expansion or start-up costs. Municipalities, not-for-profit corporations and societies can receive funding for training, marketing and community development.



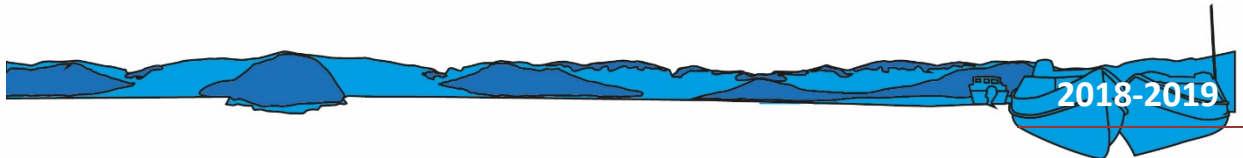
### **Municipality of Qikiqtarjuaq – Municipality of Qikiqtarjuaq, \$75,125**

The Municipality of Qikiqtarjuaq created the Qikiqtarjuaq Gathering House, which serves as a focal point for tourism activities in the community. The community required support to implement their 'Qikiqtarjuaq Tourism Plan 2018-21' which was produced by community consultations. The hamlet developed tourism products which include a Community Waking Tour, Iceberg Boat Tour, Cultural Home Visit, Overnight Cabin stay with wildlife viewing, Introduction to Inuktitut, Igloo Building and Dog Sled Tours.

The 2018-19 funds were used to complete the Qikiqtarjuaq Gathering House, host business development awareness workshops in the community, and aid the municipality with tourism-related community economic development planning.

### **Tundra Valley Lodge - \$250,000**

The department partially supported renovations for the Tundra Valley Lodge bed and breakfast in Iqaluit. The B&B offers a variety of services for their clientele. Located in the Tundra Valley neighbourhood of Iqaluit the B&B overlooks Koojesse Inlet and provides expansive views of the ocean. In addition to short-term overnight stays, the lodge offers a meeting space and workshop room rental for local business, government groups, and non-profit organization.



### 3.4 Cruise Tourism

The expedition cruise industry—if regulated and developed appropriately—represents a significant resource that is renewable, encourages cultural learning and exchange, and provides supplementary income and full-time job opportunities for Nunavummiut. The steady growth of the industry, coupled with Nunavut’s market positioning as an exclusive high-end destination, offers considerable scope for Nunavummiut to create unique tourism products and leverage ongoing economic benefits.

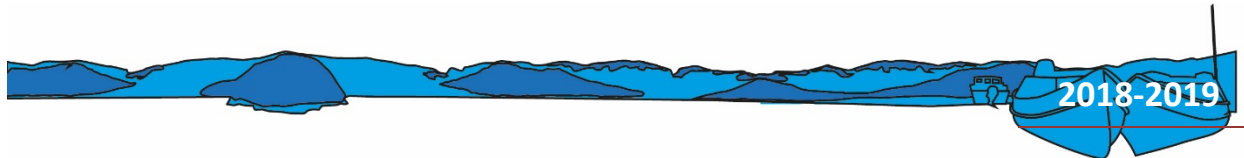
To take advantage of these opportunities the department is leading several development initiatives that tap directly into the potential for this unique economic resource. This includes the continued implementation of two flagship training programs: the Cruise Ready! Community Preparedness Workshops and *Nalunaiqsijiit*: the Inuit Tourism Training Initiative.

The Cruise Ready! Workshop is designed to help communities maximize spending from both cruise passengers and operators as each cruise ship visit leads to direct economic benefits for between twenty to forty individuals in each community. These workshops are delivered upon community request. To date the workshop has been held in Pond Inlet, Gjoa Haven, Cambridge Bay, Clyde River and Grise Fiord, with further plans for Resolute and a return to Gjoa Haven.

*Nalunaiqsijiit*: the Inuit Cruise Training Initiative is an innovative program designed to place twelve Inuit per year onboard cruise vessels as full expedition team members. The program follows a holistic approach to training. Nine out of ten of the trainees from the 2017 pilot program worked onboard vessels during the 2018 cruise season. Of the trainees from the 2019 cohort, ten worked onboard cruise ships this summer; additionally, four trainees will join Quark Expeditions’ staff training program in Antarctica in January and February of 2020.

The department also continues to undertake a number of other development efforts to increase general oversight of the cruise industry, and specifically to protect the rights of Inuit harvesters. In 2018 the department received formal letters of concern from HTO’s in Pond Inlet and Clyde River regarding potential disruptions in nearby fjords where traditional harvesting activities take place. The department communicated these concerns directly to operators and requested voluntary avoidance of these sensitive areas. The operators responded favourably to these requests, leading to a 100% voluntary compliance rate.

The department introduced new Marine Tourism Regulations, including a requirement for operators to complete economic benefit reporting forms to better quantify the financial contributions of cruise ships to communities. As an example of the impact of one ship, the 2019 Pre-Trip Economic Benefit Report submitted by Hurtigruten estimated nearly \$40,000 in operator spending over two days in Cambridge Bay. These mandatory economic benefit reporting forms are now also complemented by a data-sharing provision contained within a Memorandum of Understanding signed by the department and AECO at the recent Tourism Summit held this April in Iqaluit, which will serve to further strengthen their accuracy and completeness.



To streamline the above efforts and further engage Nunavummiut stakeholders, the department is developing a new Marine Tourism Management Plan which will outline implementation goals through 2025.

### Why Cruise Tourism?

Eight cruise ships conducted 23 voyages in the territory in 2018. The department estimates that 12 cruise ships conducted 21 separate voyages in Nunavut waters between July and September 2019. This includes the MS Roald Amundsen, a brand new 478 passenger ship from Norway's Hurtigruten, and MS The World, the luxury residential cruise ship that sails around the globe. Both of these ships will attempt to transit the Northwest Passage, with MS The World having previously done so successfully in 2012.

The complete itinerary for 2018 for all cruise ships in Nunavut can be found in **Appendix A**. For a list of cruise ships including their estimated passengers, size, ice class and the expected nationalities of their passengers, please see **Appendix B**.

Cruise tourism in Nunavut continues on its slow-but-steady growth trajectory, mirroring global trends that show an increase in demand for expedition cruise tourism in the planet's polar regions. As older ships are gradually decommissioned they are being replaced by newer, safer, and more fuel-efficient vessels. The municipality of Pond Inlet, with the help of departmental staff, developed a Pond Inlet Community Policy and Procedures for cruise ship visits (see **Appendix C**) which many other communities are now following.

This growth represents a singularly unique opportunity for Nunavummiut. It is at this critical stage – during the infancy of the industry's presence in Nunavut – that we can ensure program supports are put in place that consistently empower communities to seize available opportunities. It is important to keep in mind just how small the territory's marine tourism industry actually is: Nunavut welcomed 3,400 cruise passengers in 2018 whereas Greenland received over 28,000 passengers that same year. As other circumpolar destinations reach the point of saturation, Nunavut will see continued interest through the need for operators to diversify their itineraries.

### 3.4.1 Community Engagement

#### Radio Sessions

Radio Sessions were held in Pond Inlet, Gjoa Haven and Cambridge Bay as part of the Cruise Ready! Workshop. During the radio shows community members learned which dates the cruise ships planned to visit and were provided with information about the workshop. Listeners were also invited to call in and ask questions.

As expected, Pond Inlet received the highest level of engagement call-ins from listeners. Topics discussed included failure to generate crafts sales to passengers, recommended speed limits for cruise ships in Eclipse Sound and Navy Board Inlet, hiring monitors or observers onboard cruise ships, and how it could be possible for artists to better organize and prepare for cruise ship visits – i.e. knowing exactly when they are coming and what their passengers can buy. After brief introductions, GN staff opened the show to questions from community members.



Radio Call-In Show in Gjoa Haven, June 2019

## Community Hall Sessions Pond Inlet



Pond Inlet Community Hall Presentations, May 2019



The community hall presentations and discussions in Pond Inlet were well-attended, with over 80 community members present.

An introduction and overview of the program was delivered by GN staff. Presentations were delivered by representatives from Quark Expeditions, Eyos Expeditions and the AECO. This was followed by a question and answer period.

The presentations and discussion ran from 7:00 pm to 10:30 pm, an hour-and-a-half over schedule. It became clear that community members felt validated by the presence of industry representatives and responded well to their willingness to answer questions. This was the first community hall of its kind in Pond Inlet, with cruise industry representatives never participating in any previous GN and municipal office-led community preparedness efforts.

### Cambridge Bay

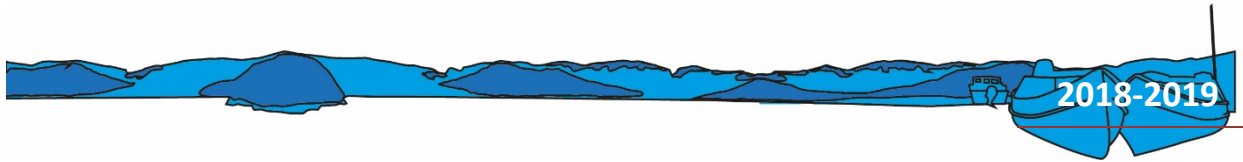
Attendance at the community hall presentation and discussions in Cambridge Bay was limited, with only 11 community members in attendance at the session. The format was similar to Pond Inlet, with GN staff introducing the workshop, speaking about the upcoming season, followed by a presentation from Hurtigruten introducing AECO.



**Cambridge Bay Cruise Ready! Workshop, June 2019**

### Grise Fiord

The Grise Fiord community hall presentation and discussion was relatively well-attended, with over 15 registered participants. Individuals expressed a high degree of interest in the information provided about



Nunavut's cruise industry in general and impacts on Grise Fiord more specifically. Overall, the presence of GN staff and discussions around cruise ships were seen as highly beneficial to community members.

### 3.4.2 Community Guidelines

The Association of Arctic Expedition Cruise Operators (AECO), represents all cruise operators, as well as some of the yachts, that visit the Canadian Arctic. This organization has developed a comprehensive set of guidelines for its members. Following these guidelines is mandatory in order to secure continued membership with the organization. These guidelines include Operational, Biosecurity, Wildlife, Clean-Up, and Visitor Guidelines for their members. The organization has also produced animated visitor guidelines which AECO member passengers watch before arriving in Arctic communities.

The AECO branded guidelines automatically have more leverage among the industry and it is mandatory for them to be communicated to passengers by expedition team staff. Specific community guidelines are more detail-oriented and provide a better reflection of the subtle nuances between different communities.

The AECO has developed specific community guidelines for other Arctic communities, including for Longyearben, Svalbard, Seyðisfjörður, Iceland, and Sisimiut, Greenland. No specific community guidelines exist for the Canadian Arctic however the AECO's general community guidelines have been adopted by some communities, most notably Pond Inlet, Clyde River and Cambridge Bay.

As part of the "Cruise Ready!" program specific community guidelines were developed by Pond Inlet and Grise Fiord community members. There were not enough community members in Cambridge Bay during the scheduled AECO workshop module to provide a relevant cross-section of community perspectives.

### 3.4.3 Economic Benefit Reporting

The department collects operator spending information for communities via its Pre- and Post-Trip Economic Benefit Reporting forms (**Appendix D**). These forms are mandatory under the Marine Tourism Regulations and all cruise ships visiting the territory are required to complete the forms as part of their overall departmental licencing process.

The forms capture direct employment on board cruise ships as well as goods and services purchased in communities by each operator. Given the recent nature of this requirement, many operators have filled in the forms inconsistently and arbitrarily. As operators get used to the requirement, the department is beginning to see more reflective numbers of the actual impacts of the industry. There are still a number of discrepancies between actual operator spending and what is reported to the department due to the unintuitive nature of the Pre-and Post-trip form spending categories.

The department, in collaboration with Statistics Canada, will develop a new form template for operators to use during the 2020 licensing season.

### Estimated spending through Pre- and Post-Trip Economic Benefit Reports\*

Year	Estimated Community Visits	Estimated Impact	Actual Community Visits	Actual Impact
2017	57	NA	52	\$400,000
2018	59	\$376,016	47	\$388,351
2019	57	\$677,258**	NA	NA

\*While operators are required to submit pre and post-trip spending information to the department, some operators complete the form incorrectly. The figures above are approximations and not necessarily reflective of the actual level of operator spending. For example, many operators don't list the salaries and wages of the Inuit culturalists and guest lecturers that they employ while voyaging in the territory.

\*\*Increased operator spending is directly related to increases in Nunavut community service fees.

### Passenger spending

The Pre- and Post-trip forms do not capture passenger spending. This remains a significant data gap for accurately reporting the economic impact of cruise ships in the territory. The 2015 Nunavut Visitor Exit Survey (VES) estimated a spending of \$670 per passenger in Nunavut. This figure is probably high due to methodological inconsistencies with the 2015 VES; namely, the VES did not ask for group size and instead extrapolated passenger spending on an individual basis.

The department is currently exploring ways to better capture cruise passenger spending in Nunavut. Additionally, the department is implementing a pilot project with Statistics Canada to capture passenger spending through a Cruise Exit Survey in Iqaluit, Pond Inlet and Cambridge Bay this year.

The Cruise Exit Survey questionnaire is listed in **Appendix E**.

### 3.4.4 Memorandum of Understanding with the AECO

After the AECO annual general meeting held on October 2018, the AECO members formed a Community Engagement Committee by unanimous vote. This committee's strategy and objectives are as follows:

In order to ensure the utmost consideration to local people, communities, and cultural heritage the AECO aims to:

1. Ensure **dialogue and collaboration** with all relevant stakeholders
2. Develop mutual **benefits**: including economic development, social responsibility and sustainability
3. Facilitate the **education** of staff and visitors

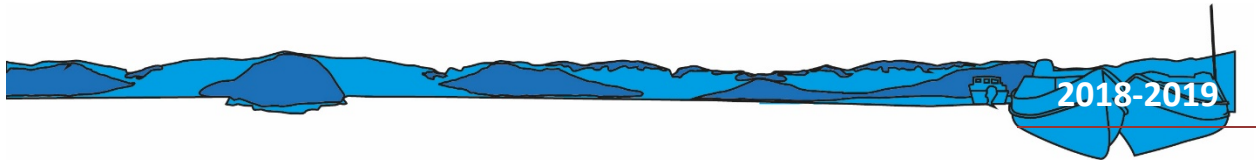
4. **Coordinate** joint efforts within the industry
5. Support community interest in competency **development and training**
6. Contribute to the **welfare** of Arctic communities

The MOU outlines a direct commitment from industry to support the ongoing implementation of the program and contains the following specific areas of collaboration;

- a) collaboration on the delivery of *Nalunaiqsijiit*: the Inuit Cruise Training Initiative;
- b) EDT will fund instructor fees, training fees, travel costs, and all other costs associated with *Nalunaiqsijiit*;
- c) collaboration with the Department of Culture and Heritage and Inuit Heritage Trust on the development of site-specific guidelines for archaeological, paleontological, and sensitive sites as well as municipalities in the Canadian Arctic;
- d) collaboration on Cruise Ready! Community Preparedness Workshops;
- e) collaboration on certain data-sharing protocols that will provide the Government of Nunavut with economic and geographical information on cruise traffic in Nunavut waters; and
- f) any other form which the parties agree would be practical in the circumstances.



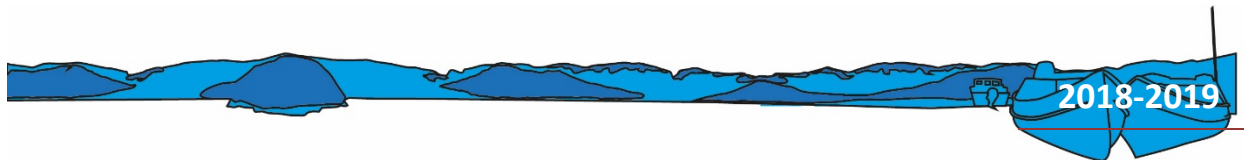
Signed MOU attached as **Appendix F**.



#### 3.4.5 Request to Restricted Areas for Operators

In 2018 the GN responded to community concerns from Pond Inlet and Clyde River about cruise ships going into certain traditional harvesting areas. The GN communicated this concern via the AECO to cruise operators, achieving a 100% compliance rate in 2018.





## 4. Destination Nunavut Branch

Destination Nunavut (DN) is the territorial destination marketing organization. DN raises brand awareness by advancing private sector efforts and partnering with leading national organizations in the field of tourism, including Destination Canada and Indigenous Tourism Association of Canada. DN works to increase inbound tourism numbers and expenditure by working closely with Inuit-owned businesses to target business and leisure travellers, improve Nunavummiut's quality of life by sharing tourism revenue across all three regions, and promote Nunavut as the authentic Inuit culture capital of the world. DN also provides training opportunities for Inuit outfitters to become business, market, and trade ready. Its marketing initiatives include:

- **Branding** - creating a name that identifies and differentiates Nunavut to make the territorial swoosh recognizable
- **Marketing** - promoting tourism products and services
- **Promotion** - publicizing DN to increase sales and public awareness
- **Public Relations** - creating a favourable image in the public
- **Trade relations** - building relationships with industry partners for co-marketing opportunities

Since online resources are the most preferred source of information for travellers' trip planning, DN uses the official website, digital campaigns, social media (Facebook, Instagram, and Twitter) and other digital media as main marketing channels.

### 4.1 Official Website

By March 2019, DN's official website had attracted 66,968 users and 156,044 page views from Canada (77%), United States (13.9%) and other countries. Compared to the year before, returning users accounted for 83.1% and new users 16.9%. Male (56.7%) viewers were slightly more than female (43.3%). Over 70% of the audience fitted DN's target age demographic of 35-64 years. The website was designed mobile-friendly as over half (55.3%) of the users accessed it via mobile phone, followed by desktop (32.2%), and tablet (12.5%). Twenty-nine per cent of the website traffic was generated by organic search, direct, social or referral while 71.2% from paid advertising (paid search, display and other). Due to a lack of paid ad campaigns in summer, the website experienced a traffic drop during that period of time.



## 4.2 Digital Campaigns

For the past year, DN ran advertising campaigns on Trip Advisor, Facebook, web search engines, Canadian Geographic, Horizon Magazine, and UpHere Magazine and other online platforms. They enjoyed a total of 20.7 million impressions, 88,166 clicks, 5,740 conversions, 0.42% click-through rate (CTR), and \$1.04 click per cost (CPC).

Display advertising is to display ads on websites, social media, or online magazines through banners, images, and video (**Appendix F**). The main purpose of display advertising is to create awareness and deliver brand messages to site visitors. This was the leading channel to drive awareness for DN, with over 16 million impressions over the year. It also had a healthy CTR of 0.12%, which was much higher than the industry average rate of 0.04%-0.05%.

Trip Advisor ranked the top of CPC as the website was visited by users with higher interest to travel. Facebook gained the highest number of conversion (3,181), followed by Paid Search (2,016). Paid Search had the highest CTR which showed high ad relevance and strong user intent.

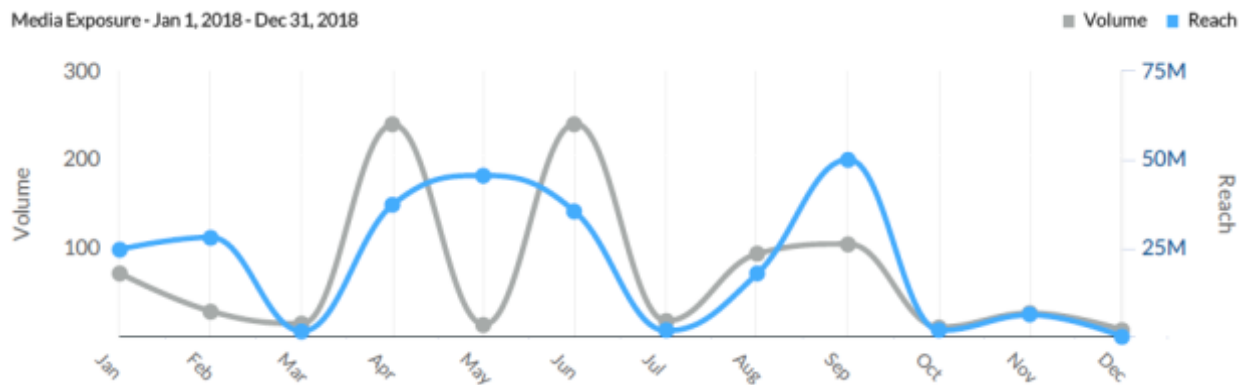
Channel	Impressions	Clicks	Conversions	CTR	CPC
Display	16,288,682	18,915	323	0.12%	\$1.96
Trip Advisor	594,545	725	220	0.12%	\$16.40
Facebook	3,625,981	48,858	3,181	1.35%	\$0.49
Paid Search	264,744	19,668	2,016	7.43%	\$1.42
<b>Grand Total</b>	<b>20,773,952</b>	<b>88,166</b>	<b>5,740</b>	<b>0.42%</b>	<b>\$1.04</b>

### Definitions:

- Impressions: How many people saw the ad in their feeds
- Clicks/CTR: How many clicked on the ads to the website /percentage of impressions
- Conversions: How many users interacted with DN's ad and then clicked through to an operator's page.
- CPC: Based on the cost and clicks how much did each click cost

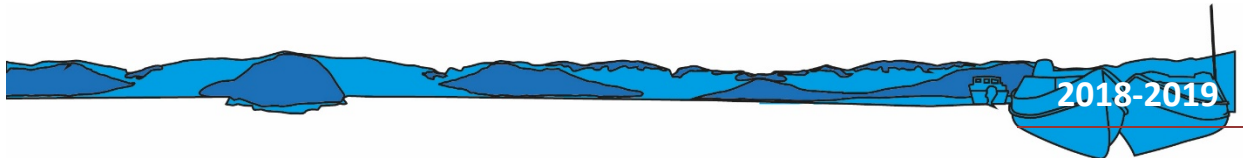
### 4.3 Organic media coverage

In 2018, DN and Nunavut tourism information received 874 editorial mentions (the number of appearances in articles) and 251 million organic media reach across 12 different countries, mainly in Canada (52%) and the USA (46%). DN also gained media coverage from Washington Post Travel, Fodor's Travel Magazine (reached 774k), Matador Network (reached 1 million) and other prestigious online publications.



#### TOP COUNTRIES

Canada	52%	Australia	< 1%
United States	46%	Germany	< 1%
United Kingdom	< 1%	Netherlands	< 1%
India	< 1%	Croatia	< 1%
China	< 1%	Tunisia	< 1%



## Highlights



*"Top world destinations are overrun. Take our suggestions for roads not taken."*

Washington Post Travel



Nunavut is on the 2019 Go List from Fodor's Travel Magazine.



Reached 774K!

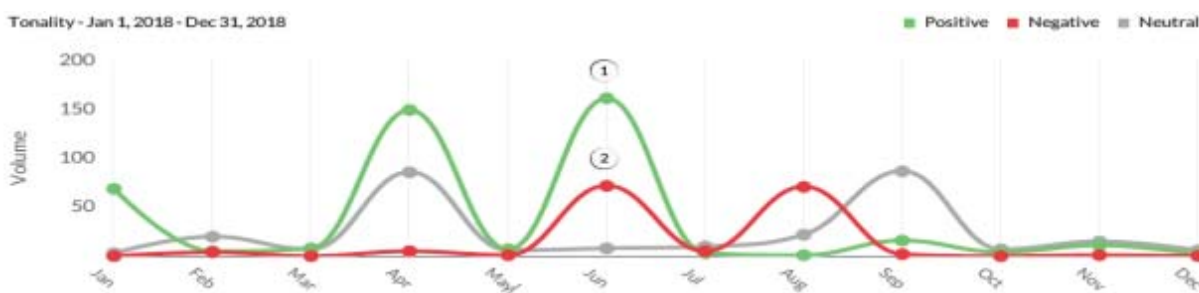
**"25 places you need to travel to in 2019"**

— matadornetwork.com



Reached 1million!

As tourism is susceptible to negative events and comments, DN also carefully monitors brand image and public relations through media monitoring tools. Overall, DN's net tonality was positive. June had the highest volume of 161 positive articles but also the highest volume of 72 negative articles. "BuzzFeed", with 32.3M reach, drove the highest positive sentiment in an article titled "The Jerry Cans Are A Victory For The North."



### ARTICLES WITH MOST IMPACT



BuzzFeed | May 31  
**The Jerry Cans Are A Victory For The North**  
 Why the Iqaluit folk-rock quintet are putting their Inuit roots front and centre.  
 Reach 32.3M ● Positive


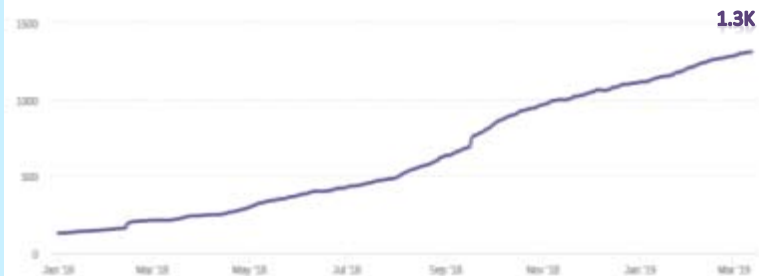
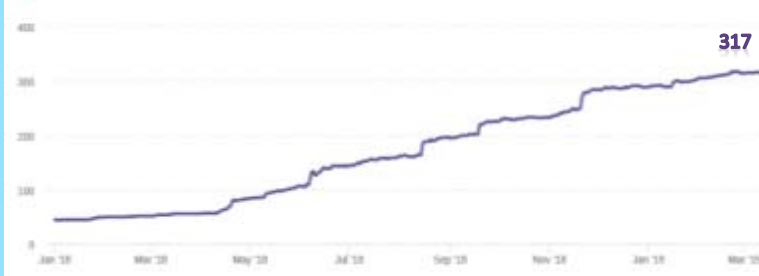


Global News | Aug 25  
**Passengers on grounded Arctic cruise ship to be flown back to Yellowknife**  
 KUGAARUK, Nunavut - RCMP say passengers from an Arctic cruise ship that ran aground Friday morning will be flown back south. Cpl. Serge Yelle of the Kugaruuk detachment says he expects between 80 and...  
 Reach 5.6M ● Negative



## 4.4 Social Media

DN actively publishes the latest travel information and industry news on social media to communicate with potential customers and increase brand visibility. Until March 2019, DN made 153 posts on Facebook (2-3 posts per week), 60 on Instagram (1-2 per week), and 149 on Twitter (2-3 per week). DN's followers have increased tremendously. Facebook followers rose from 318 in January 2018 to 2,100 in March 2019 (560% increase), Instagram from 129 to 1,300 (908% increase), and Twitter from 44 to 317 (620% increase); the total numbers of engagement (public shares, likes or comments) were 18,000 on Facebook, 2,100 on Instagram, and 1,900 on Twitter.

Dec 2018 Mar 2019	Posts	Engagement	Followers
Facebook	153	18,000	 <p>2.1K</p>
Instagram	60	2,100	 <p>1.3K</p>
Twitter	149	1,900	 <p>317</p>

### Highlights (Jan 2018–March 2019):

#### The top five Facebook posts by reach:

1. Feb 21, 2018: 8.9K - Destination Nunavut Video repost
2. Jan 25, 2019: 7.9K - NYT Travel Show Polar outfitting, Igloo Tourism post
3. Jan 27, 2018: 5.2K - Arctic Kingdom floe edge video
4. Jan 11, 2019: 4.4K - Matador Network article NU should be your next trip
5. Nov 7, 2018: 2.8K - International Inuit Day message

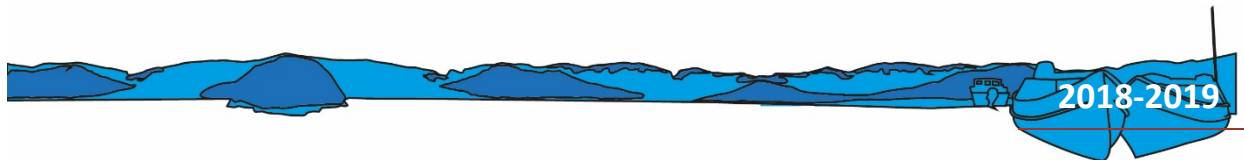
#### The top five Instagram posts by likes:

Posts Table			
Date	Message	Likes	Comments
destination nunavut Dec 10, 14:16	Located 800km north of the Arctic Circle, on Somerset Island is the most northerly fly-in lodge on earth-Arctic Watch Wilderness Lodge. There are no permanent residents on the island but it's home to polar bears, musk ox, arctic foxes and is a world class beluga whale observation site. #nunavut #spiritoftheArctic #canadakeepexploring #travel #travelphotography #travelphotos	196	8
destination nunavut Nov 23, 20:19	See Arctic wildlife in their #Arctic home, in Nunavut. #polarbears #nunavut #spiritoftheArctic #canadakeepexploring <a href="https://bit.ly/2P0KAD9">https://bit.ly/2P0KAD9</a>	168	1
destination nunavut Feb 06, 13:05	The first time you see a whale emerge from icy water and exhale sharply into the bright #Arctic sunlight, you will feel something that few travellers in this world have felt. Watch as thousands of belugas congregate near the shorelines and listen as their playful sounds fill the air. Searching for the mysterious narwhal? Travellers are in for a rare treat when they spot one of these unique whales. Or venture to the high—	150	8
destination nunavut Jan 27, 16:44	Nunavut is in @matadornetwork list of Top 25 places to travel in 2019, head over to @matadornetwork and check it out, link in bio. #nunavut #travel #Canada #travelphotos #thuckfirst	144	1
destination nunavut Oct 22, 17:46	Long nights just mean more time for #Aurora viewing. In Nunavut all you need is some clear sky and place to look up. #spiritoftheArctic #nunavut #canadakeepexploring	139	1

#### The top five Twitter posts by engagement:

(mostly driven by #CanadaChat, a co-marketing campaign with Destination Canada)

Date	Message	Retweets	Replies	Likes	Only Click
@NuTourism Nov 21, 18:42	A4: You are guaranteed a white #Christmas in Nunavut. And you will also find a warm, holiday spirit. The Aurora provide some spectacular Christmas lights. #CanadaChat #SpiritoftheArctic Photo: B. Hersh <a href="https://twitter.com/NuTourism/status/1065314418786033688/photo/1">https://twitter.com/NuTourism/status/1065314418786033688/photo/1</a>	44	4	182	
@NuTourism Nov 21, 18:15	A2: Across Nunavut, residents in each community eagerly anticipate the annual Christmas Games. They can run for up to 2 weeks with traditional Inuit games, dancing, and sharing in the holiday spirit. #CanadaChat #nunavut #SpiritoftheArctic Photo: M. Davies <a href="https://twitter.com/NuTourism/status/1065307819845533697/photo/1">https://twitter.com/NuTourism/status/1065307819845533697/photo/1</a>	24	4	97	
@NuTourism Nov 21, 18:50	A6: Christmas in #Nunavut is a wonderful experience, the warmth of families gathering to share holiday spirit under the #AuroraBorealis nature's #Christmas lights. #CanadaChat #SpiritoftheArctic Photo: M. Davies <a href="https://twitter.com/NuTourism/status/1065317801899782085/photo/1">https://twitter.com/NuTourism/status/1065317801899782085/photo/1</a>	26	1	89	
@NuTourism Aug 15, 17:18	A2: Taking a dip up north can be more than a little chilly, unless you have the right insulation! Baffin Island is teeming with marine mammals like the polar bear that swim in the cool waters of the Atlantic and Arctic Ocean. #CanadaChat Photo: @meetthenorth @eric_guth <a href="https://twitter.com/NuTourism/status/1029770747690569728/photo/1">https://twitter.com/NuTourism/status/1029770747690569728/photo/1</a>	14	1	74	
@NuTourism Mar 07, 20:11	Hockey is very popular in #Nunavut. One of the best tournaments is in Rankin Inlet, The Terence Toole Memorial Cup. In past years, facing flight cancellations from weather, teams skidoosed over 100 KMs to play in the tournament. #Hockey @tattaleee - @tootoo22 & @stuartjiaq <a href="https://twitter.com/NuTourism/status/1103750023362371585/photo/1">https://twitter.com/NuTourism/status/1103750023362371585/photo/1</a>	13	0	70	



## 4.5 Travel Trade and Media Events

DN has been working closely with Destination Canada (DC) and the Indigenous Tourism Association of Canada (ITAC) to attend trade and media shows and reach international markets and potential clients. Below is a list of 2018's events:

	Promotional Events	Time
1	Arctic Spirit Photography Contest	March-April, 2018
2	Rendez-vous Canada Halifax, Experiential Suite (co-funded by ITAC)	May 13-16, 2018
3	FPT Trade mission to China	June 21-28, 2018
4	Media tour—TV Series "Seeing Canada"	September 10-14, 2018
5	Nunavut Trade Show	September 18-20, 2018
6	GoMedia Calgary	October 1-4, 2018
7	World Travel Mart (WTM) London, UK	November 5-7, 2018
8	International Media Marketplace (IMM) New York	January 24, 2019
9	New York Times Travel Show (co-funded by ITAC)	January 25-27, 2019

### 4.5.1 Arctic Spirit Photography Contest

The goal of this contest was to enrich DN's photo bank and increase awareness of its Instagram and Facebook accounts by encouraging Nunavut residents to take photographs of special places in the territory. During the six-week event, Nunavummiut from all regions took pride in showcasing features of the land. DN was able to add 46 new images to the photo bank. Prizes with a total estimated retail value of \$1700 were given to the following photographers.

**1<sup>st</sup> place - Connor Goddard – Pond Inlet**



**2<sup>nd</sup> place Connie Nowdluk - Iqaluit**



**3<sup>rd</sup> place Matilde Metivier (Apex)**



### 4.5.2 Rendez-vous Canada (RVC) Halifax

The 42nd edition of Rendez-vous Canada (RVC) took place at the Halifax Convention Centre in Halifax, Nova Scotia and attracted more than 1,900 travel professionals from across 29 countries. Under Inuit Tourism Business Mentorship Program, DN brought four Inuit entrepreneurs to the show, including Hakongak Outfitting, Polar Outfitting, Arctic Bay Adventures, and Nunavut Outfitters.

To showcase Inuit art and culture, DN displayed carvings, seal skins, and qamutik at the Experiential Suite and invited staff from visitor centre to demonstrate Inuit games and qulliq lighting (without fire) at an Igloo tent decorated with cotton snow and Christmas lights. Country food was also served regularly to promote Nunavut culinary. Over the four-day event, DN made 37 appointments with national and international buyers and tourism professionals from 15 countries to promote tourism products and services and raise brand awareness in the industry. DN also delivered a media presentation and gained strong interest from foreign journalists.



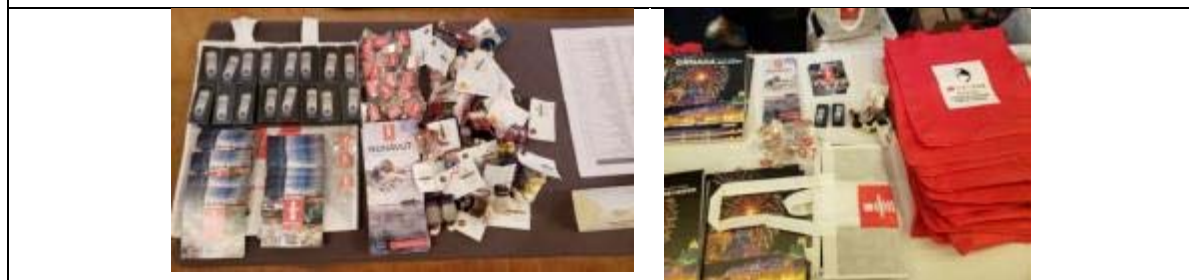
#### **4.5.3 FPT Trade mission to China**

In September 2016, Prime Minister Trudeau and Chinese Premier Li announced that 2018 would be the Canada-China Year of Tourism. On April 17, the Honourable Bardish Chagger, the former Minister of Small Business and Tourism, officially invited provincial and territorial delegates to join an FPT Ministerial tourism industry trade mission to China from June 21 to 28, 2018. The trade mission was part of Minister Chagger's commitment to working with provincial and territorial representatives to better promote Canada as a top tourism destination. Nunavut was represented by DN and select trade-ready businesses. DN successfully built connections with Chinese media, major online payment operators, high-end travel agencies and prestigious online travel agencies for potential partnership opportunities. DN also met with the Destination Canada Chinese office, Canada China Business Council, and Consulate General of Canada to obtain market information and facilitate future collaboration. Furthermore, DN enhanced destination awareness by reaching more than 100 local buyers with giveaways, pamphlets, and maps. Nunavut was also in the Hangzhou newspaper and the national TV channel.

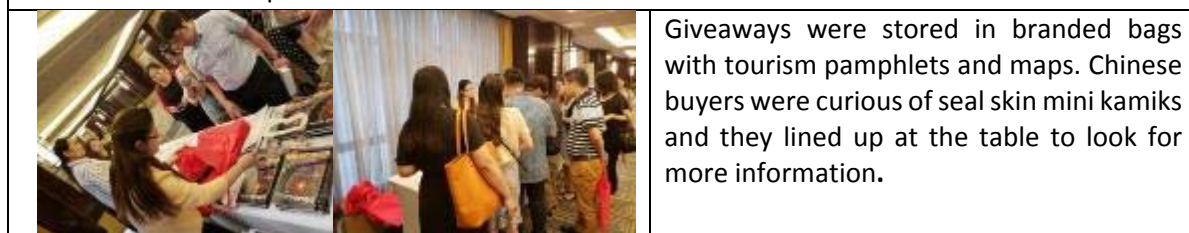




DN connected with local media, major online payment operators, high-end travel agencies, major online travel agencies, Destination Canada Chinese office, Canada China Business Council, and Consulate General of Canada in China.



DN offered USB (stored with tourism information), pamphlets, maps, and mini kamiks zipper pulls from Rankin Inlet to promote Nunavut.



Giveaways were stored in branded bags with tourism pamphlets and maps. Chinese buyers were curious of seal skin mini kamiks and they lined up at the table to look for more information.



Nunavut was in the Hangzhou newspaper

#### **4.5.4 Media tour—TV Series “Seeing Canada”**

Market research shows that the USA ranks after Canada as the second biggest inbound tourism market for Nunavut. To target the US market, DN hosted a five-day media familiarization tour with Brandy Yanchyk, a producer of a series of travel documentaries called Seeing Canada. An episode of Nunavut will be broadcast on PBS, Create TV, and other public television stations in the USA distributed through the National Educational Telecommunications Association (NETA). NETA’s shows are available to every public television station in the 50 states plus Puerto Rico and the Virgin Islands. From a television video on demand standpoint, the US learner audience is 35% more likely than the general population to watch PBS content. In fact, with the exception of California (Index 99), each target market over-indexes by about 30%. The Washington DC area (including Delaware/Maryland/DC/West Virginia) indexes the highest at 283, and Texas over-indexes at 280. PBS also indexes highly with US learners for online video-on-demand (125), online streaming (117), and website visits (136).



#### **4.5.5 Nunavut Trade Show**

The Nunavut Trade Show & Conference is Northern Canada’s largest annual business to business event, bringing together all levels of government, Inuit Corporations, Nunavut & southern businesses, investors, and entrepreneurs for three days of powerful networking. DN attended the Nunavut Trade Show and distributed giveaways to build connections with local stakeholders and increase brand awareness in the territory. It is important for Nunavummiut to learn more about DN because it will motivate them to improve service delivery and become tourism ambassadors in the near future. DN does not only think about marketing to its customers outside the territory. Internal marketing and branding is just as important to the people who can make the brand come to life.

#### **4.5.6 GoMedia Calgary**

GoMedia is Canada’s premier travel media event organized by Destination Canada that brings together top travel media from around the globe. In a fast-paced setting, DN was paired with 32 journalists to promote Nunavut’s tourism products in interactive one-on-one sessions. One highlight was that a Chinese blog covering DN’s information received organic media coverage of 3.214 million!





Reached  
3.214 million!

#### 4.5.7 World Travel Mart London, UK

World Travel Mart (WTM) London, UK is the leading global event that offers three-day business-to-business exhibition for the worldwide travel and tourism industry. In 2018 there were about 51,500 senior travel industry professionals, government ministers, and international press at the show to discover the latest industry opinion and trends. DN was working closely with Destination Canada to display Nunavut's tourism image on brochures, booth backboard, and LCD advertising TV wall to raise brand awareness and generate gross impressions from direct marketing and on-site promotion. DN also attended a Digital Influencers Speed Networking session and made connections with 37 buyers, media, partners, digital influencers, and industry stakeholders to understand market challenges, negotiate new opportunities with UK businesses, and promote Nunavut's products and services. After the show, DN continues to work with Destination Canada UK office to reach UK travel trade and media partners and update tourism information.



#### 4.5.8 International Media Marketplace New York

International Media Marketplace (IMM) is the leading single day event uniting journalists and the travel industry in the USA. It has played host to over 2,500 international media and 1,425 exhibiting companies since 2013. In 2019's event DN scheduled 48 appointments with journalists, influencers, bloggers, and

writers to target US market and increase exposure in the USA. DN also gained access to the media contact database and is aiming to develop lasting relationships with top journalists.

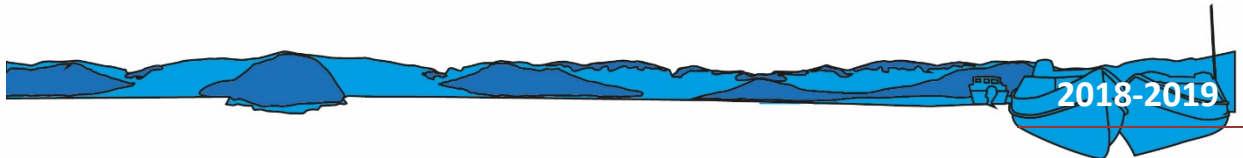


#### **4.5.9 New York Times Travel Show**

For over 15 years the New York Times Travel Show has been the largest travel show in North America. It brought together more than 700 exhibiting companies from over 176 countries and attracted 35,568 participants in 2019, including 11,756 travel trade and 23,812 consumer travelers. Market research shows that U.S. tourists to Nunavut are mainly from eastern large urban centres of Massachusetts, New York, New Jersey and Washington, with a smaller potential of visitors from the states of California. Through Inuit Tourism Business Mentorship Program, DN brought two Inuit entrepreneurs from Polar Outfitting and Igloo Tourism and Outfitting to the show to explore the market and gain first-hand feedback from potential clients.

Over the three-day show, DN and Inuit outfitters reached more than 500 attendees via face-to-face meetings, flyers, and giveaways. Participants were enthusiastic about Nunavut tourism products and lining up at the booth to talk to DN. The Facebook post also reached 7,837 people and gained the highest engagements of the month—1,179.





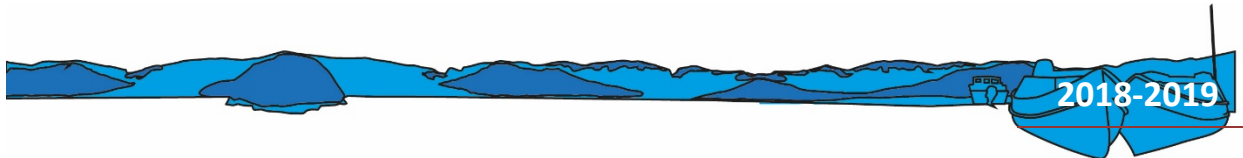
## 5. Visitor Centre Branch

Nunavut has four visitor centres operated by the Government of Nunavut:

1. Unikkaarvik Visitor Centre, Iqaluit
2. Kivalliq Regional Visitor Centre, Rankin Inlet
3. Arctic Coast Visitor Centre, Cambridge Bay
4. Angmarlik Visitor Centre, Pangnirtung

Visitor centres provide maps and tourism and historical information, feature prized Inuit artworks, and hold special events and exhibitions for tourists to the territory. For the past year, we received a total of 11,649 domestic and international tourists, including 9,171 in Iqaluit, 1,674 Rankin Inlet, and 804 Cambridge Bay. Especially in Iqaluit, the Unikkaarvik Visitor Centre saw 5,698 visitors from within Nunavut and 3,473 from Canada, America, and overseas. Visitor centres in Cambridge Bay, Iqaluit, and Pangnirtung experienced busy summer and cruise seasons; we continue to see steady visitor traffic throughout the year.

By the end of spring 2018, the Kivalliq Regional Visitor Centre, Angmarlik Visitor Centre, and the Unikkaarvik Visitor Centre have been connected to the Government of Nunavut internet network, with the exception of the Arctic Coast Visitor Centre in Cambridge Bay. The facility is not hardwired to the GN business central network. A separate package with Qiniq-SSiMicro had to be arranged for staff. All four visitor centres have now been equipped with GN issued computers, telephone equipment, and can now access the main GN network.



## Visitor numbers of Arctic Coast Visitor Centre and Kivalliq Regional Visitor Centre

Month	ACVC	KRVC
April 2018	47	
May 2018	80	
June 2018	107	261
July 2018	211	271
August 2018	121	296
September 2018	56	55
October 2018	58	216
November 2018	59	157
December 2018	8	44
January 2019	9	51
February 2019	29	242
March 2019	19	81
TOTALS	804	1674

KRVC numbers didn't start until June because of the transition to the new location.

## Visitor numbers of Unikkaarvik Visitor Centre

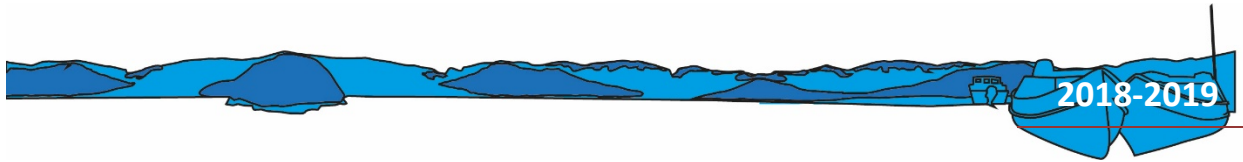
Month	Visitors/patrons from within Nunavut	Visitors from outside of Nunavut (domestic and international)	Total
April 2018	746	354	1100
May 2018	615	233	848
June 2018	625	249	874
July 2018	798	468	1266
August 2018	526	566	1092
September 2018	406	803	1209
October 2018	439	231	670
November 2018	365	148	513
December 2018	266	99	365
January 2019	227	59	286
February 2019	325	92	417
March 2019	360	171	531
<b>TOTALS</b>	<b>5698</b>	<b>3473</b>	<b>9171</b>

### 5.1 Unikkaarvik Visitor Centre, Iqaluit

In Iqaluit, the Unikkaarvik Visitor Centre ran weekly movie nights which have become popular community events. During 2018-19, there were about 45 movie nights that averaged 20 patrons a screening. The centre also hosted special activities including a literary performance by Wayne Johnston, the Glenbow Museum photo project with Joanne Schmidt from Calgary, and TD Book Week with children's author Carey Sookocheff.

Moreover, Unikkaarvik held a special screening of the Canada C3 documentary about the Icebreaker that took groups of Canadians across the Northwest Passage from Newfoundland to British Columbia. There were also Nunavut Premier film events such as *Tia* and *Piujuk* by Lucy Tulugarjuk, *Kivitoo* by Zacarias Kunuk, *Iglu: Angirraq* by Mosha Folger and *Trash* by Suzanne Parm-Etheridge.

Unikkaarvik continued to partner with local and national organizations to present the Cubesat satellite presentation with Nunavut Arctic College, the special screening of *Glory and Honour* with the Nunavut Black History Society, book sales, Christmas events, and Canadian Film Day with the Iqaluit Centennial Library and the Qilaut DVD launch with the Department of Culture and Heritage. On Canada Day, the visitor centre hosted Alianait for an acoustic concert by the Twin Flames, a Greenlandic Drum Dancing workshop and a throat singing workshop. Unikkaarvik provided a home base for the Qanurli television show crew for the filming of their final season, Moosemeat and Marmalade filmed parts of an episode in the visitor centre and Canada Goose filmed part of their Project Atigi promotional material inside the centre.



Unikkaarvik is a community centre and partner as well as being a visitor centre for tourists. It was and is Toonik Tyme Central every year providing support to Toonik Tyme as well as hosting events for the annual festival. The visitor centre is still the headquarters for the Iqaluit Community Clean Up and Barbecue and continues to be a part of the planning committee for that event and Nunavut Day. On Nunavut Day, Unikkaarvik Visitor Centre staff provided drinks and helped all day at the festivities.

## 5.2 Kivalliq Regional Visitor Centre, Rankin Inlet

The Kivalliq Regional Visitor Centre participated with its partners and NTI for Nunavut Day celebrations and with the Hamlet of Rankin Inlet for the Annual Community Cleanup. One of the highlights was the Grand Opening of the centre on June 16, which attracted about 75 attendees. The centre also hosted tours for large groups like the Canadian Rangers, summer camps and students from Rankin Inlet and Toronto. The centre has also become a popular place to host meetings for groups like the Kivalliq Inuit Association and Economic Development Officers. In partnership with Inhabit Media and Ivalu Lt. and the Nunavut Development Corporation (NDC), the visitor centre hosted a Nunavut Authors Signing and Sale Event, which featured Susan Aglukark, Germaine Arnatauyuk, Nadia Sammurtok, Suzie Napayok, and Aviaq Johnston. The event attracted over 100 people. The authors focused on Inuit Literacy by reading and sharing stories to children in Inuktitut. Susan Aglukark performed live for the community. The NDC provided traditional gourmet snacks and food. The Glenbow Museum's hosted a 3 day identification and showing of their Cape Fullerton photographic collection from the 1700s. Each event was well attended by local elders and residents. Inuit Art Markets and digital photography workshops for local Inuit artists and producers was sponsored by the Kivalliq Trade Show.

## 5.3 Arctic Coast Visitor Centre, Cambridge Bay

The Arctic Coast Visitor Centre is fully staffed and operational as of October of 2018. It has a close partnering arrangement with the Hamlet of Cambridge Bay. There were two joint projects that were driven by local groups in February/March of 2018: one was metal signage in Inuinnaqtun and English by the youth metal work artists; the other was community beautification project with the local 'Anaana's Group', to make banners with embroidered tundra flora and fauna images, and lettering in Inuinnaqtun.

The Hamlet of Cambridge Bay was administering and monitoring progress for both projects. A contribution from the CanNor grant that totalled approximately \$16,000.00 towards those two projects was made by the visitor centre in March 2018.





The Arctic Coast Visitor Centre entered into a partnership with Parks Canada for the delivery of annual Parks Day celebrations, barbeques, and traditional games and activities. They saw approximately 100-130 participants and visitors during the five-hour event at the centre grounds and facility on July 21, 2018.

### 5.4 Angmarlik Visitor Centre, Pangnirtung

The Arngmarlik Visitor Centre in Pangnirtung, has a fully dedicated Elders program. The centre hosts activities with the Elders twice weekly. The centre entered into an arrangement with the local Hamlet’s Tourism committee and the high school social studies class to develop and update historical and modern informational material to offer visitors. It also works closely with Parks Canada and Nunavut Territorial Parks for various events. For instance, the staff is involved in Parks Canada’s ‘Ship Wrecks’ identification project in and around Cumberland Sound. The team collects historical information from local knowledge holders, maps and record findings as part of Pangnirtung’s Whaling Industry history. Financed by a \$65,000 grant from CanNor this fiscal year, the Angmarlik visitor centre is now equipped with state-of-the-art audio and visual equipment and modern furniture for the Elder’s Room and the office. The centre is in the process of digitizing its large film library from VHS to digital. They will run movie nights and information sessions with the new digital library and equipment in the near future. The grant from CanNor will cover the cost of this work. In the late spring, the Glenbow Museum also conducted presentations and slide showings to show their Inuit photo collection from the 1700s.

#### Event photos

	
Author Carey Sookocheff TD Book Week with Ceporah Mearns	Black History Month



Glenbow Moodie Collection with Joanne Schmidt



Moosemeat and Marmalade filming



Pop Up Market Cruise Ships



Qanurli Season 7



Toonik Tyme Central



Trash Movie Iqaluit Premier



Twin Flames Canada Day Concert

## Appendix A: Cruise Nunavut – Community Visits Itinerary

Community	Ship/Company	Estimated Arrival Date*	Estimated Passengers**
Arctic Bay	Akademik Ioffe / One Ocean Expeditions	August 20	96
	Ocean Adventurer / Quark xpeditions	September 12	150
Cambridge Bay	Akademik Sergey Vavilov/One Ocean Expeditions	August 24 disembark	92
		August 24 embark	92
	Akademik Ioffe / One Ocean Expeditions	September 1 disembark	96
		September 1 embark	96
	MV Hanseatic / Hapag-Lloyd Cruises	September 3	170
	MV Fram / Hurtigruten	September 10 disembark	230
		September 10 embark	230
Cape Dorset	MV Silver Cloud / Silversea Cruises	September 12	250
Clyde River	Le Soléal / Ponant	August 24	264
	MV Hanseatic / Hapag-Lloyd Cruises	September 9	170
Gjoa Haven	Ocean Endeavour / Adventure Canada	August 30	198
		September 5	198
	Le Boréal / Abercrombie & Kent	August 31	264
	MV Hanseatic / Hapag-Lloyd Cruises	September 4	170
	Le Soléal / Ponant	September 6	264
	MV Fram / Hurtigruten	September 9	230
		September 11	230
Grise Fiord	Ocean Endeavour / Students on Ice	August 2	220
	MV Hanseatic / Hapag-Lloyd Cruises	August 14	170
	Akademik Ioffe / One Ocean Expeditions	August 18	96
	MV Silver Cloud / Silversea Cruises	August 28	250
	Ocean Endeavour / Adventure Canada	September 11	198
	Ocean Adventurer / Quark Expeditions	September 14	150
Iqaluit	Akademik Ioffe / One Ocean Expeditions	August 3 disembark	96
		August 3 embark	96
		September 13 disembark	96
	Akademik Sergey Vavilov/One Ocean Expeditions	August 2	92
		September 15 disembark	92
	Seabourn Quest / Seabourn	August 18 clearance	450
	MV Silver Cloud / Silversea Cruises	September 9	250

Community	Ship / Company	Estimated Arrival Date*	Estimated Passengers**
Kimmirut	MV Silver Cloud / Silversea Cruises	September 11	250
Kugluktuk	Ocean Endeavour / Adventure Canada	September 2 disembark	198
		September 2 embark	198
Pangnirtung	Akademik Sergey Vavilov/One Ocean Expeditions	August 4	92
		September 13	92
	Akademik Ioffe / One Ocean Expeditions	August 5	96
		September 11	96
Pond Inlet	Ocean Adventurer / Quark Expeditions	August 31	150
	Ocean Endeavour / Students on Ice	July 30	220
	Ocean Endeavour / Adventure Canada	August 12	198
		August 25	198
	Akademik Ioffe / One Ocean Expeditions	August 10	96
		September 7	96
	MV Hanseatic / Hapag-Lloyd Cruises	August 11	170
		August 29	170
	Nat. Geo. Explorer / Lindblad Expeditions	August 11	148
		August 22	148
	Akademik Sergey Vavilov/One Ocean Expeditions	August 16	92
		August 30	92
	MV Silver Cloud / Silversea Cruises	August 22	250
	Le Soléal / Ponant	August 22	264
		September 2	264
	Le Boréal / Abercrombie & Kent	August 26	264
Oikiqtarjuaq	MV Fram / Hurtigruten	September 3	230
		September 17	230
	Ocean Adventurer / Quark Expeditions	September 5	150
	Le Soléal / Ponant	July 31	264
	Akademik Ioffe / One Ocean Expeditions	August 7	96
	Ocean Endeavour / Adventure Canada	August 23	198
Resolute	Ocean Adventurer / Quark Expeditions	September 2	150
	Akademik Sergey Vavilov/One Ocean Expeditions	September 10	92
		September 10	92
	Ocean Endeavour / Students on Ice	August 6 disembark	220
		August 6 embark	198
		August 14 disembark	96
		August 14 embark	96
	Ocean Adventurer / Quark Expeditions	August 23 disembark	96
		August 23 embark	96
	Ocean Adventurer / Quark Expeditions	September 10 disembark	150
		September 10 embark	150



## Appendix B: Cruise Nunavut – List of Cruise Ships and their Statistics

Ship	Operator	Ice Class	Length	Tonnage	PAX	PAX Make-Up
L'Austral	Compagnie du Ponant	1C	142m (466 ft)	10,700 GT	264	French
Le Boreal	Compagnie du Ponant	1C	142m (466ft)	10,944 GT	264	French
MS Fram	Hurtigruten	1B	114m (374 ft)	12,700 GT	400	Norwegian, German
MS Roald Amundsen	Hurtigruten	PC6	140m (459 ft)	20 889 GRT	530	Norwegian, German
MV Bremen	Hapag-Lloyd Kreuzfahrten GmbH	E4	11m (365 ft)	6,751 GT	155	German
MV Hanseatic Nature	Hapag-Lloyd Kreuzfahrten GmbH	1AS	122m (403 ft)	8,378 GT	230	German
MV Ocean Adventurer	Quark Expeditions	1B	137m (450 ft)	12,907 GT	198	American, Canadian, English
MV Silver Cloud	Silversea Cruises	1A	157m (514 ft)	16,800 GT	296	South African, Australian, English
National Geographic Explorer	Lindblad Expeditions	1A	112m (367 ft)	6,471 GT	148	American
Ocean Endeavour	Adventure Canada	1B	138m (452 ft)	12,907 GT	450	Canadian, American, Australian
RCGS Resolute	One Ocean Expeditions	1AS	132m (433 ft)	8,378	146	American, Canadian
Silver Explorer	Silversea Cruises	1A	108m (345 ft)	6,130 GT	132	Australian, South African, English

## Appendix C: Hamlet of Pond Inlet Cruise Ship Services 2019 Policy and Procedures

### Hamlet of Pond Inlet Cruise Ship Services 2019 Policy and Procedures

#### Background:

Over the past several years the Hamlet of Pond Inlet has seen an ongoing interest and increase in the number of cruise ships visiting the community. The Hamlet appreciates the interest of the world and welcomes all who wish to visit and learn more about the Inuit language, its culture, heritage and life in the Baffin Region of Canada. In 2018 the Hamlet provided services to twenty-two (22) cruise ships and their passengers. These services ranged from hosting passengers on a guided tour, visiting the community's Visitor Centre to attending a local theatrical performance.

The provision of these services involves a great deal of preparation, training and management of staff, resulting in significant time and resources. It is in that light that the following "Cruise Ship Policy and Procedures" will be implemented for the 2019 Cruise Ship Season effective immediately.

#### 2019 Cruise Ship Service Rates:

Service rates for the 2019 Cruise Ship Season shall be **\$75.00 CDN per passenger** and all fees shall be **payable in advance**. Final determination of the number of passengers disembarking at Pond Inlet shall be made by Hamlet's Marine Security Officer at passenger point of entry. (There are no Goods and Services Tax -GST required for ships arriving from outside Canada)

*Note: Cruise Ships arriving from within Canada will be assessed GST at a rate of 5% or \$3.75 per passenger on all services delivered.*

#### Landing Requests and Approval:

Cruise Ships requesting Hamlet approval to come ashore shall do so in writing, prior to being provided with conditional approval. Approvals will be scheduled on a first come first served basis and are **conditional only** upon all service-related fees being transferred to the Hamlet of Pond Inlet by electronic funds transfer (EFT) a minimum of thirty-days (30) in advance of the scheduled date for arrival. Once all fees have been deposited, an email with final confirmation of the approved arrival date will be sent to the cruise ship operator.

Written requests for permission to come ashore at the Hamlet of Pond Inlet should be directed to the Senior Administrative Officer (SAO) at [Sao@pondinlet.ca](mailto:Sao@pondinlet.ca).

#### Advance Electronic Funds Transfer (EFT):

The transfer of all related service fees shall be sent to the Hamlet of Pond Inlet via electronic funds transfer (EFT) in Canadian Funds and as directed below:

**Transit Number: 09851**

**Institution Number: 003**

**Account Number: 101-380-4**

**Royal Bank of Canada**

**Iqaluit Branch**

**Iqaluit Building #922**

**P.O. Box 190. Iqaluit, Nunavut, XOA OHO**



## Hamlet of Pond Inlet Cruise Ship Services 2019 Policy and Procedures

Cruise ship operators making EFT deposits are advised to forward an email advice to [finance@pondinlet.ca](mailto:finance@pondinlet.ca) indicating the following:

- Name of Ship
- Operating Company
- Details of Payment

If the cruise operator requires an invoice from the Hamlet of Pond Inlet prior to making EFT transfers, a written request should be directed to [finance@pondinlet.ca](mailto:finance@pondinlet.ca).

### Cancellation Policy:

If the arrival of any cruise ship has been cancelled in advance of the scheduled arrival date, service fees held in trust from the cruise ship operator will be reimbursed by the Hamlet within one week via electronic funds transfer to the account of the cruise ship operator, less a **cancellation fee of twenty-five percent (25%) of fees on deposit.**

### Outstanding Arrears:

Approval for visiting the Hamlet of Pond Inlet shall not be granted to any cruise ship operator with arrears owing to the Hamlet of Pond Inlet for services provided in prior years. Full payment of all outstanding fees shall be received by the Hamlet by electronic funds transfer (EFT) prior to approval being granted for a scheduled visitation in 2019. Final approved date of arrival shall only be granted, conditional upon all outstanding fees for service being deposited within 30 days of scheduled date of arrival.

This Policy and Procedure has been approved by the Hamlet of Pond Inlet Council by Motion # 02-21-2019-06 dated this February 21, 2019.

  
\_\_\_\_\_  
Mayor  
\_\_\_\_\_  
SAO



<b>COMMUNITY NAME</b> <i>*please use one per planned community visit</i>	
<b>How many passengers disembarked in the community:</b>	
<b>How many staff and crew disembarked in the community:</b>	
<b>How much time was spent in the community (hours):</b>	
<b>What type of activities were undertaken by the passengers in the community (broadly):</b>	

### PRE-TRIP ESTIMATE & POST-TRIP ACTUAL

Economic Development Benefit Category	Pre – Trip Estimate \$ value	Post-Trip Actual \$ value	short description
1. Direct Employment <i>Wages, salaries, and contract commitments paid directly to Nunavut residents, companies, hamlets, or NGOs. Includes Nunavummiut hired to work on the ship.</i>			
2. Purchased Goods & Services <i>Purchases of goods and/or services with revenues going directly to Nunavut organizations, businesses, or residents. Includes performances, local guides, etc.</i>			
3. Services and Training <i>Services or training provided to community and community members by passengers and/or crew.</i>			
4. Donations <i>Money or estimated value of items donated directly to the community visited.</i>			
5. Passenger Purchases <i>Estimate of how much passengers spent in the community.</i>			
6. Indirect Benefits <i>Calculated at 10% of the above expenditures.</i>			
<b>TOTAL</b>			

Please click 'Add Another Page' and  
fill out one page per community

-->

Add Another Page

DISCLAIMER: "The use and disclosure of information supplied under this form is subject to the Access to Information and Protection of Privacy Act, S.N.W.T. 1994, c. 20 ("the ATIPP Act") and other applicable legislation."



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Building *Nunavut* Together  
*Nunavut* / Inuqatiglingniq  
Bâtir le *Nunavut* ensemble

ᐱᐅᐅᐅᐅᐅᐅᐅᐅᐅᐅᐅᐅᐅᐅᐅᐅ  
Department of Economic Development & Transportation  
Pivalliauliyikkut Ingilrayuliyitkullu  
Ministère du Développement économique et des Transports

## Pre-Trip Marine Tourism Economic Benefits Reporting Form

<b>Vessel Name:</b>		
<b>Voyage Name:</b>		
<b>Trip Dates:</b> (mm/dd/yyyy)	<b>From:</b>	<b>To:</b>
<b>Operator Name:</b>		
<b>Anticipated # of Passengers:</b>		

### PLANNED COMMUNITY VISITS

	COMMUNITY	DATE (mm/dd/yyyy)
List of intended Nunavut <u>community</u> visits AND ESTIMATED DATES: (According to the original itinerary, communities only: no other sites or special places in Nunavut)	Select Community...	
	Select Community...	
	Select Community...	
	Select Community...	
	Select Community...	
	Select Community...	
	Select Community...	
	Select Community...	
	Select Community...	
	Select Community...	

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20 ("the ATIPP Act") and other applicable legislation."

**COMMUNITY NAME**

\*please use one per planned community visit

**PRE-TRIP ESTIMATE**

<b>Economic Development Benefit Category</b>	<b>Pre –Trip Estimate \$ value</b>	<b>short description</b>
1. Direct Employment <i>Wages, salaries, and contract commitments paid directly to Nunavut residents, companies, hamlets, or NGOs. Includes Nunavummiut hired to work on the ship.</i>		
2. Purchased Goods & Services <i>Purchases of goods and/or services with revenues going directly to Nunavut organizations, businesses, or residents. Includes performances, local guides, etc.</i>		
3. Services and Training <i>Services or training provided to community and community members by passengers and/or crew.</i>		
4. Donations <i>Money or estimated value of items donated directly to the community visited.</i>		
5. Indirect Benefits <i>Calculated at 10% of the above expenditures.</i>		
<b>TOTAL</b>		

Add Another Page

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## Appendix E: Cruise Exit Survey Questionnaire

### Nunavut Cruise Exit Survey (CES) English

CONFIDENTIAL once completed.  
Please verify the information below  
before submitting the control form.

Version française disponible

BUSINESS AND CONTACT INFORMATION		TELEPHONE AND E-MAIL
Department of Economic Development & Transportation 1104A Inuksugait Plaza PO Box 1000, Stn. 1500 Iqaluit, Nunavut X0A 0H0		Tel: 867 975-7800 Fax: 867 975-7870 EDT@gov.nu.ca
SURVEY PURPOSE		
This survey collects traveller data on tourism and travel experience in Nunavut. Information from this voluntary survey will be used by the Government of Nunavut and members of the Canadian tourism industry and government tourism organizations to better understand and serve travellers.		
CONFIDENTIALITY		
The Government of Nunavut agrees to keep all data confidential and use them only for statistical purposes. This information may also be used by Statistics Canada for statistical and research purposes.		
<b>Why we conduct this survey?</b> The Government of Nunavut is conducting a survey on travel and tourism. Information from this voluntary survey will be used by members of the Canadian tourism industry and government tourism organizations to better understand and serve the travelling public. Your information may also be used by Statistics Canada for other statistical and research purposes. Although voluntary, your participation is important so that the information collected is as accurate and complete as possible. This survey is to be completed only by adults 18 years of age or older.		
BASIC TRAVEL INFORMATION		
1. Are you 18 years of age or older? <input type="radio"/> Yes <input type="radio"/> No → End interview		
2. Are you travelling as a member of a boat crew or a military or diplomatic corps? <b>Exclude</b> military personnel and diplomats; their spouses and dependents are also excluded only if they have diplomatic passports and are travelling as members of a diplomatic corps as part of their work. <b>Exclude</b> crew members from either boats or planes who are travelling because of their job. <input type="radio"/> Yes → End interview <input type="radio"/> No		
3. Where do you live? <b>Select only one.</b> <b>Within Canada</b> <input type="radio"/> Newfoundland & Labrador <input type="radio"/> New Brunswick <input type="radio"/> Manitoba <input type="radio"/> British Columbia <input type="radio"/> Nunavut <input type="radio"/> Prince Edward Island <input type="radio"/> Quebec <input type="radio"/> Saskatchewan <input type="radio"/> Yukon <input type="radio"/> Nova Scotia <input type="radio"/> Ontario <input type="radio"/> Alberta <input type="radio"/> Northwest Territories <b>Outside of Canada</b> <input type="radio"/> Australia <input type="radio"/> France <input type="radio"/> India <input type="radio"/> South Korea <input type="radio"/> United States <input type="radio"/> Brazil <input type="radio"/> Germany <input type="radio"/> Japan <input type="radio"/> Taiwan <input type="radio"/> China <input type="radio"/> Hong Kong <input type="radio"/> Mexico <input type="radio"/> United Kingdom <input type="radio"/> Other country – specify: _____		

8-2241-615.1: 2019-05-30



4. Including yourself, how many people (who travelled together) can you report spending for on this trip?

For this survey, these people are considered to be your travelling party. Please report for these people throughout the questionnaire.

### PACKAGE OR INCLUSIVE TRIPS

The following questions are about travel packages.

A travel package covers at least part of your trip and includes any combination of at least two services for which individual costs are not identified separately, such as:

- All-inclusive vacations
- Airfare and accommodation
- Airfare and cruise
- Accommodation, meals and entertainment

---

5. Is (or was) a travel package included as any part of this trip?

☐ Yes

☐ No → Skip to question 9

---

6. Which of the following items were included in the single price you paid?  
**Select all that apply.**

☐ Commercial transport to and from Canada (by plane, bus, train, boat)

☐ Transportation while in Canada

☐ Transportation (by plane, bus, train, boat) between foreign countries visited (other than Canada)

☐ Transportation within foreign countries visited (other than Canada)

☐ Accommodation

☐ Recreation and entertainment

☐ Food and beverages

☐ Other – specify: \_\_\_\_\_

---

7. How many nights were covered by the package portion of your trip?

---

8. How much did the package cost? (Total for your travelling party)

.00

Currency type (if other than CANS\$) used to report package spending:

☐ U.S. Dollar

☐ Chinese Yuan

☐ Japanese Yen

☐ Euro

☐ Mexican Peso

☐ Australian Dollar

☐ British Pound

☐ Other currency type: \_\_\_\_\_

\_\_\_\_\_

TOTAL SPENDING		
9. Please report <b>total spending for your travelling party</b> for this trip in each of the following categories:		
<b>Use estimates if necessary.</b> <b>Include</b> any planned spending for the remainder of your trip. <b>Exclude</b> travel package costs already reported. <b>Exclude</b> commercial transport costs to enter and leave Canada.		
Categories	Amount	Currency type (if other than CAN\$) used to report spending
Clothes, gifts and souvenirs <b>Not included</b> in travel package	□ □ □ □ □ □ .00	<input type="radio"/> U.S. Dollar <input type="radio"/> Chinese Yuan <input type="radio"/> Japanese Yen <input type="radio"/> Euro <input type="radio"/> Mexican Peso <input type="radio"/> Australian Dollar <input type="radio"/> British Pound <input type="radio"/> Other currency type: <input type="text"/>
Accommodation <b>Not included</b> in travel package	□ □ □ □ □ □ .00	
Transportation <b>while in Canada</b> (include gasoline, rented car, intercity plane, bus, train, boat, local bus and taxi) <b>Not included</b> in travel package	□ □ □ □ □ □ .00	
Transportation <b>within countries visited</b> other than Canada (include gasoline, rented car, intercity plane, bus, train, boat, local bus and taxi) <b>Not included</b> in travel package <b>Include</b> only Canadian residents travelling abroad	□ □ □ □ □ □ .00	
Food and beverages (include restaurants) <b>Not included</b> in travel package	□ □ □ □ □ □ .00	
Recreation and entertainment <b>Not included</b> in travel package	□ □ □ □ □ □ .00	
Other — specify: <input type="text"/>	□ □ □ □ □ □ .00	
<b>Not included above</b>		
<b>Total spending</b>	□ □ □ □ □ □ .00	
<b>Thank you for completing the survey.</b>		





exclude cooperation on any specific matter, and nor shall it in any way limit the ability of either party to independently determine and pursue its own objectives or priorities.

3. Cooperation under this Memorandum of Understanding will be realized in Accordance with the laws and regulations of Canada.

#### **Joint collaboration**

4. On the signing of this Memorandum of Understanding, and on a discretionary basis thereafter, the parties will meet to formally consider and determine priority issues or initiatives and to review progress on current or completed matters. Where the parties agree it would be desirable to do so, specific priorities and initiatives may be attached as appendices to this Memorandum of Understanding.

Initiatives pursuant to this Memorandum of Understanding may take the following forms:

- a) collaboration on the delivery of *Nalunaiqsijit*: the Inuit Cruise Training Initiative;
- b) EDT will fund instructor fees, training fees, travel costs, and all other costs associated with *Nalunaiqsijit*;
- c) collaboration with the Department of Culture and Heritage and Inuit Heritage Trust on the development of site-specific guidelines for archaeological, paleontological, and sensitive sites as well as municipalities in the Canadian Arctic;
- d) collaboration on Cruise Ready! Community Preparedness Workshops;
- e) collaboration on certain data sharing protocols that will provide the Government of Nunavut with economic and geographical information on cruise traffic in Nunavut waters; and
- f) any other form which the parties agree would be practical in the circumstances.

Unless otherwise specifically agreed to in advance, each party shall bear the costs of its own participation and involvement in any initiatives flowing from this Memorandum of Understanding.

#### **Coordination and Implementation**

5. Each party will be responsible for the coordination and implementation of this Memorandum of Understanding. The designated officials will maintain communication on a frequent and as needed basis to share information on matters of



relevance to both parties; to monitor ongoing initiatives; to consider additional matters which might be addressed; and to include those in the work plans as appropriate.

#### Amendment and termination

6. This Memorandum of Understanding will remain in effect unless amended or cancelled.
7. This Memorandum of Understanding may be amended at any time by written agreement of the parties.
8. Either party may terminate its involvement in this Memorandum of Understanding by giving three months prior notice in writing to the other party.

#### Review

9. The Parties agree that once every three (3) years this Memorandum of Understanding will be reviewed to ensure that the terms and conditions are mutually acceptable. It is also agreed that the annual objectives and progress achieved will be the subject of a joint annual review by both parties.

This Memorandum of Understanding is signed in Iqaluit, on this day of 16<sup>th</sup> April 2019.

B. MacIsaac Karin Strand

Bernie MacIsaac, Deputy Minister

Karin Strand, Executive Committee

Department of Economic Development and  
Transportation, Government of Nunavut

Association of Arctic Expedition Cruise  
Operators



## Appendix G: Destination Nunavut— Advertising Campaigns

### Print

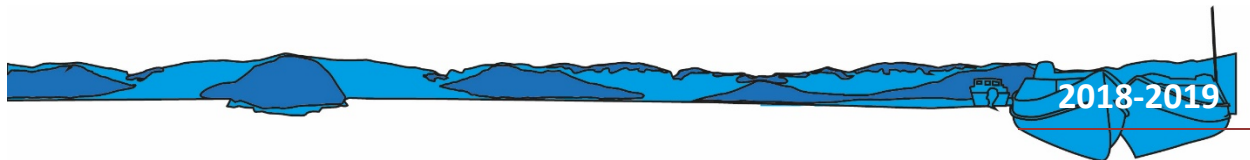


Canadian Geographic, Horizon Magazine, UpHere Magazine  
Including online presence on websites of magazines

### Virtual Magazine







## Digital Advertising



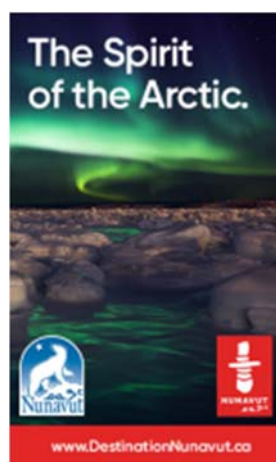
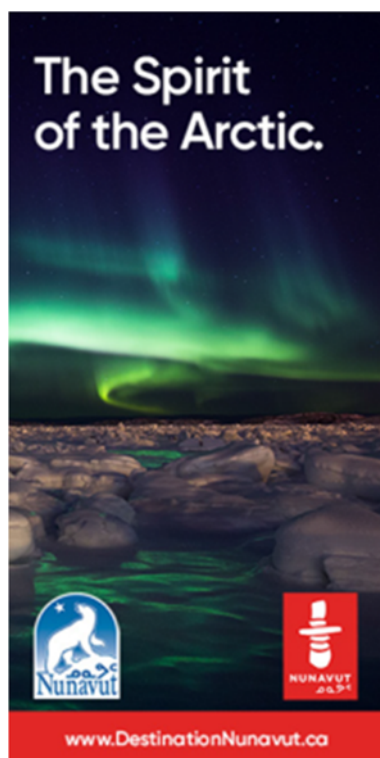
300x250



728x250



970x250



## Best performing creatives



5 sec animated videos  
– Awe-Thentic Arctic  
Campaign ended







# Pilot Survey

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Visitor Exit Survey 2018





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# Executive Summary

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The results of this pilot study speak to significant potential for Nunavut to build on its unique cultural and natural capital, as demonstrated by the positive feedback among the travellers it currently attracts and how the destination is able to accommodate, to a large degree, their desired activities and interests.

However, although the exit survey results were very positive, a number of challenges and opportunities remain unmet. Nunavut is a niche destination, particularly among international travellers. It tends to attract passionate enthusiasts in hobbies such as fishing, hunting, camping as well as wildlife. This is a strong foundation to build on, however logistical complexities, infrastructure and weather conditions present a challenge to growing within and beyond these drivers of inbound tourism – though this is by no means insurmountable with sufficient and targeted investment.

The cruise sector too presents a growing opportunity for the territory, with cruise passenger spending exceeding projections – however this sector is challenged by its ability to manage weather conditions and be flexible in its itineraries in order to maximize its potential. High cost is also a factor among both domestic and international visitors. This is no doubt exacerbated by the logistical

challenges of supplying the territory with necessary goods and services and the resultant downstream costs of touristic experiences and services. That being the case, Nunavut's unique natural and cultural capital provides it with built-in assets that can be leveraged for innovative lower cost and/or high value for money tourist experiences that could mitigate this barrier to entry.

We are excited to share that from April to September 2018, Nunavut received 51,200 visits and saw a total visitor spending impact of \$271,383,000 from outside the territory.

Within Canada, the majority of visitors come to Nunavut for business purposes, which leads to opportunities for the meetings, incentives, conventions, events sector (MICE). Taken as a whole, the pilot study indicates that Nunavut has the opportunity to market itself to domestic travellers as a distinct Canadian destination that's also the Inuit cultural capital of the world..

The Honourable David Akeeagok,  
Minister, Department of Economic Development  
and Transportation







# Methodological Summary

This document provides an analysis of pilot data collected for the Nunavut Visitor Exit Survey (VES) for the second and third quarters of 2018 and data on cruise voyages with stops in Nunavut for the third quarter of 2018. The report is a Government of Nunavut collaboration with Statistics Canada, and is a part of Statistics Canada's North Initiative project, a Statistics Canada project that aims to improve tourism statistics for the Canadian territories. The goal of the initiative is to create a statistical framework that will produce travel and tourism indicators for the territories that will integrate into the Tourism Statistics Program at Statistics Canada by 2020.

These questionnaires were developed in partnership between the Government of Nunavut and Statistics Canada. Statistics Canada will continue to provide support in future VES reports in the area of survey development, methodology, interviewer training, data capture, processing, and production of data tables and analysis of results. Government of Nunavut staff collected survey information in Iqaluit, Rankin Inlet and Cambridge Bay, and may expand data collection to Pond Inlet in future iterations of the VES.

There are some key methodological differences between the 2018 VES and the 2015 VES which are explained below.

The 2015 VES questionnaire did not ask travel party size while spending in the 2018 VES is determined based on the respondent's travel party size (e.g., a family of four).

It is possible that the 2015 VES report underestimated the passenger counts based on analysis of the flight passenger counts from OAG Aviation Worldwide, an external data provider that Statistics Canada uses for its program. Statistics Canada reviewed the passenger counts using the OAG data and compared it to what was reported on the 2015 VES report. If the flight passenger counts were underestimated in the 2015 VES report, this will directly impact the stated total expenditures and numbers of visitors to Nunavut.

The 2015 VES report excluded airfare/cruise tickets as part of total spending in Nunavut. The 2018 VES report focused on spending categories (i.e., transportation, accommodation, food and beverages, clothes and gifts, activities and recreation, other). The 2015 VES data was collected on three cruise ships and the report provided some spending data from cruise passengers. A new Cruise Exit Survey has been developed for future iterations of the VES but is not included in this pilot survey.

2018 Survey data was collected by personal assisted paper interview (PAPI); the questionnaire was on average 8 to 12 minutes in length. There are three components of the VES: a domestic questionnaire for Canadian residents travelling within Canada, an inbound questionnaire for international travellers visiting Canada, and an outbound questionnaire for Canadian residents travelling abroad. The inbound questionnaire was available in English and French while the outbound and domestic versions of the questionnaire were available in English, French, Inuinnaqtun and Inuktitut.

The target population is the civilian, non-institutionalized population 18 years of age or older travelling in Canada who are boarding commercial airplanes at one of the three target airports in Nunavut. Trips taken by diplomats, airline crew or military personnel were out-of-scope for this survey. The study did not capture inbound travellers to remote lodges via charter flights from Northwest Territories and Manitoba, however, as this is a pilot survey, the resultant data gap will be explored in further iterations.

Data from the three types of questionnaires were combined into a single raw data file. The low amount of total surveys submitted is due to this being a pilot study, representing only two quarters, and will be bolstered in further iterations with the goal of a year-round intake. Reference files that contain variations in spelling, abbreviations and possible misspellings of words were used to convert written-in-geographic answers to a code (e.g., province).



The number of questionnaires included in the raw and master data files are:

Questionnaire Type	Number of Completed Questionnaires
Domestic	669
Inbound	55
Outbound	11
Total	735

Three versions of the questionnaire were used for the 2018 Nunavut VES:

- Domestic** – This version of the questionnaire was for any resident of Canada that had a main destination that was within Canada. It was based on Statistics Canada’s National Travel Survey (NTS), which covers, amongst other things, domestic travel for residents of the provinces. This version was completed by:
  - Residents of Nunavut that were travelling either within Nunavut or to the rest of Canada.
  - Residents from the rest of Canada who were visiting Nunavut and their main destination was within Canada.
- Outbound** – This version of the questionnaire was for any resident of Canada that had a main destination that was outside of Canada. It was also based on the NTS, which also covers international travel for residents of the provinces. This version was completed by:
  - Residents of Nunavut whose main destination was outside of Canada.
  - Residents of the rest of Canada who were travelling in Nunavut but who had a main destination that was outside of Canada.

- Inbound** – This version of the questionnaire was for residents of the United States or any other foreign country that were visiting Nunavut. It was based on the Air Exit Survey (AES), which is a component of Statistics Canada’s Visitor Travel Survey (VTS). This version was completed by:
  - Residents of the United States and any other foreign country.

Cruise Voyage Data

Cruise data was collected under the authority of the Government of Nunavut, the Nunavut cruise data file was compiled based on data provided by cruise operators with at least one stop in Nunavut who completed the GN’s Marine Tourism Economic Benefits Reporting Form. Cruise data is available for a total of 23 cruise voyages made by 8 cruise operators who reported stops in Nunavut from July to September 2018. The dataset provides data for a total of 44 cruise visits to communities in Nunavut. Development of a cruise exit survey will be explored in further iterations. This cruise information does not include total passenger spending, however, the next iteration of the VES (2019) cruise passengers may be surveyed to get an idea of total passenger spending.

Glossary of Terms

**Business Travellers:** A Business traveller undertakes travel for work or business purposes, as opposed to other types of travel, such as for leisure purposes or regularly commuting between one’s home and workplaces.

**Destination Management Organisation (DMO):** A professional services company with local knowledge, expertise and resources, working in the design and implementation of events, activities, tours, transportation and program logistics.

**Domestic Trips:** Trips made by travellers residing in Canada who have travelled inside Canada for a period of less than 12 months and who are returning to their place of residency.

**Familiarization Tours (FAMs):** Trips organized by travel providers or destinations as a means to promote and educate the audience on their products and services.

**Inbound Trips:** An inbound trip will correspond to the travel between arriving in a country and leaving, whereas a domestic trip or an outbound trip will correspond to the travel between leaving the place of residence and returning. A domestic trip has a main destination in the country of residence of the traveller, while an outbound trip has a main destination.

**Meetings, Incentives, Conventions, Events (MICE):** A specialized niche of group tourism dedicated to planning, booking, and facilitating conferences, seminars, and other events.

**Other personal:** This can include to attend a non-business conference, convention or trade show, to shop, to go to school or to study, for an ambulance, for a regular treatment or check-up, for other medical, dental or health reasons, for religious reasons, to pick up or drop off someone or something, to move to a new residence or to help others move, to go to a funeral.

**Outbound Trips:** An outbound trip has a main destination outside this country.

**Overseas Countries:** Countries other than the United States.

**Tourism Operator/Supplier:** A tourism operator/supplier commonly refers to a business organization involved in the delivery of tourism services and/or experiences.

**Trade-Ready Operator:** A trade-ready operator is a tourism business demonstrating a degree of experience and sophistication to engage with domestic and/or international tour operators.

**Travel Agent:** An individual or organization engaged in selling branded and/or third-party tourism services and/or experiences.

**Travel Trade:** The industry standard definition referring to tour operators and travel agents engaged in promoting, selling and/or handling tourism services and/or experiences.

**Trip:** A trip refers to the travel by a person from the time of departure from his usual residence until he/she returns: it thus refers to a round trip. A trip is made up of visits to different places.

**Visitor:** A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips. Tourism refers to the activity of visitors.

**Unique Selling Proposition (USP):** The factor or consideration presented by a seller as the reason one product or service is different from and better than the competition.

**Visiting Friends and Relatives (VFR):** This category includes, for example, activities such as visiting relatives or friends; attending weddings, funerals or any other family event; short-term caring for the sick or old, etc.



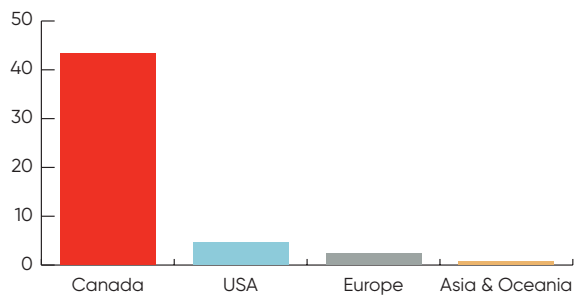
# Total Number of Travellers

## Travel within Nunavut

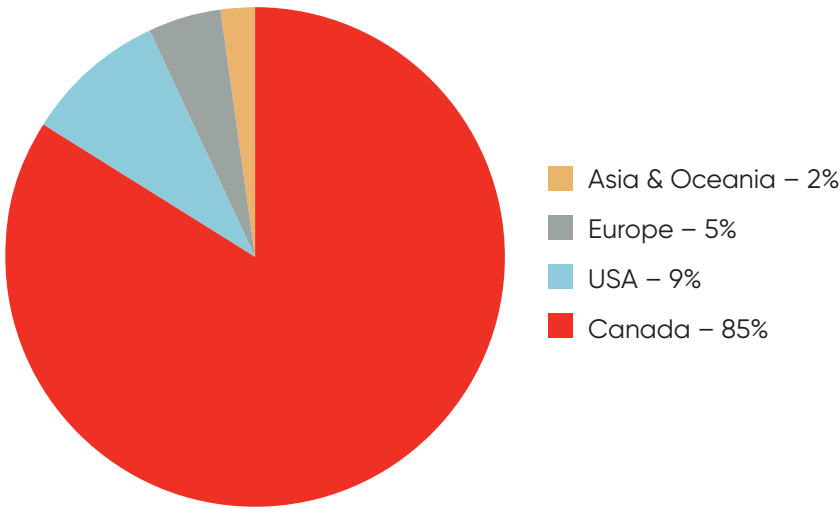
The total number of visits to Nunavut in 2018 from April to September 2018 was 51,200 from outside Nunavut (rest of Canada and international). Canadian residents, including Nunavummiut (people who live in the territory of Nunavut), made 134,100 visits in Nunavut in the second and third quarters of 2018, spending \$476 million. Over two-thirds (68%) of all visits by Canadian residents in Nunavut from April through September 2018 involved Nunavummiut spending at least one night within their territory of residence before travelling elsewhere (90,700 visits – i.e. stay within an individual location), spending about 54% of all travel expenses by Canadians in Nunavut. Average travel spending in Nunavut by Nunavummiut totaled \$2,800 per visit. Business was the main trip purpose for almost half of all trips by Nunavummiut (48%, 64,400 trips) within Nunavut, during these two quarters, followed by those who travelled for other personal reasons (33%) and

for holiday, leisure or recreation (14%). Domestic Canadian travel is unsurprisingly dominant in terms of inbound travel to Nunavut at this stage with 85% of visitors (43,400) from within Canada, only 9% from the USA and 5% and 2% from Europe and Asia and Oceania respectively.

**Total Visitors to Nunavut by Country (000s)**  
Total Visitors (Not including Nunavut Residents) – 51.2



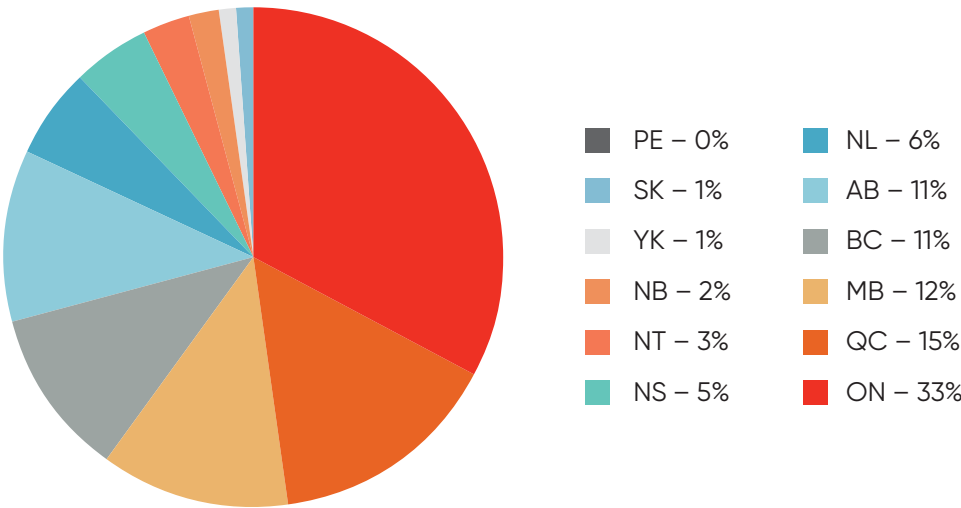
**Percentage of Visitors to Nunavut by Place of Residence**  
Total Visitors



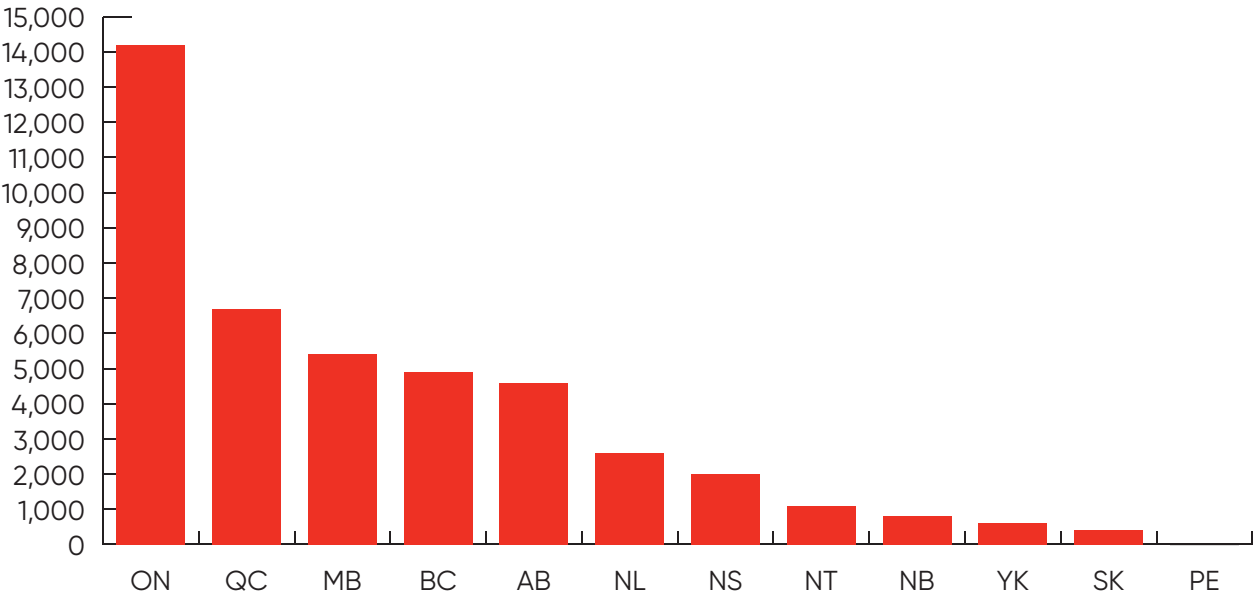
Ontario and Quebec Top Inbound Numbers

Within Canada the highest proportion of visits from outside Nunavut itself came from the major centers of Ontario and Quebec (33% and 15% respectively) followed by Manitoba (12%), British Columbia (11%) and Alberta (11%). Despite being a neighbouring province, the Northwest Territories featured much less prominently (3%).

Percentage of Canadian Visitors by Place of Residence  
Total Canadian Visitors (Not including Nunavut Residents) – 43,400



Canadian Visitors by Place of Residence  
Total Canadian Visitors (Not including Nunavut Residents) – 43,400



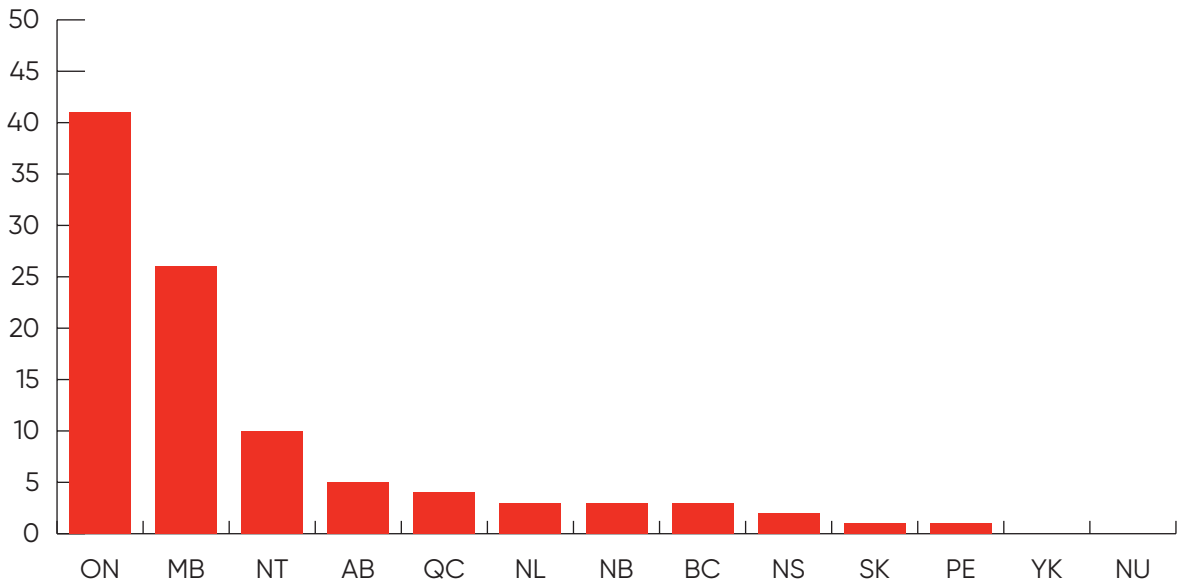
Travel Between the Rest of Canada and Nunavut

Travel between Ontario and Nunavut represents the highest degree of mutual travel between two provinces, with the largest proportion (41%, 35,500 in total) of the 85,800 Nunavummiut visits recorded outside of Nunavut in the exit survey travelling to Ontario. This is followed at some distance by Manitoba (26%) and the Northwest Territories (10%), with 48% of Nunavummiut travellers citing business as their main purpose of trip. Thirty-three per cent of Nunavummiut travellers attribute their travel to “other personal” – this can include to attend a non-business conference, convention or trade show, to shop, to go to school or to study, for an ambulance, for a regular treatment or check-up, for other medical, dental or health reasons, for religious reasons, to pick up or drop off someone or something, to move to a new residence or to help others move, to go to a funeral. To

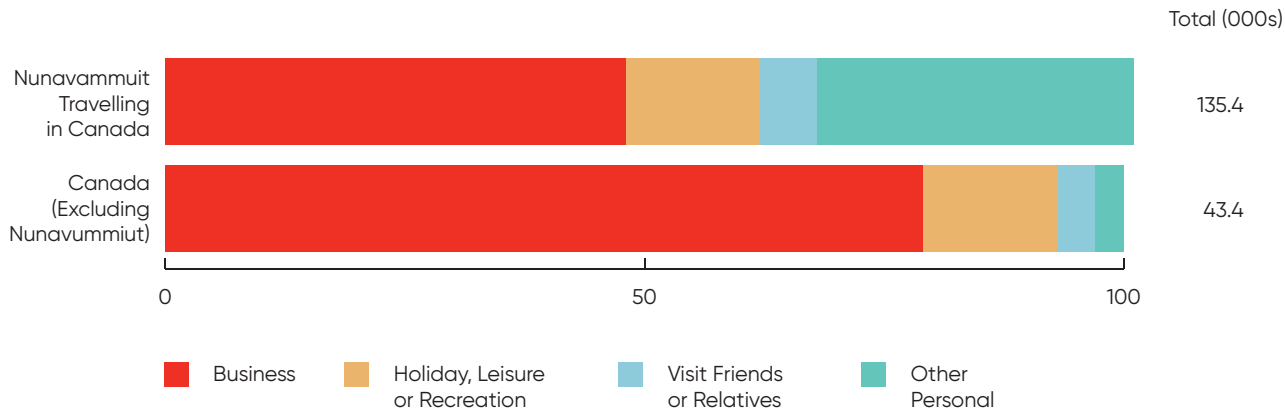
some extent this may be accounted for by connecting flights and trips with a combined purpose – as this option encompasses a range of activities and motivations, it may be worth additional investigation to gain a more granular understanding of this segment. Only 14% of outbound Nunavummiut travellers attribute their journeys to holiday, leisure and recreation.

When we directly compare inbound visitation from the rest of Canada to Nunavummiut travelling in the rest of Canada, there is a marked divergence in business travel, with far more Canadians travelling into Nunavut for business purposes than Nunavummiut travelling in the rest of Canada. This may bolster the imperative to develop the meetings, incentives, conventions, events sector (MICE) in Nunavut.

Percentage Nunavummiut Travelling in Canada by Destination



Nunavummiut Travelling in Canada vs Visitors to Nunavut by Purpose of Visit

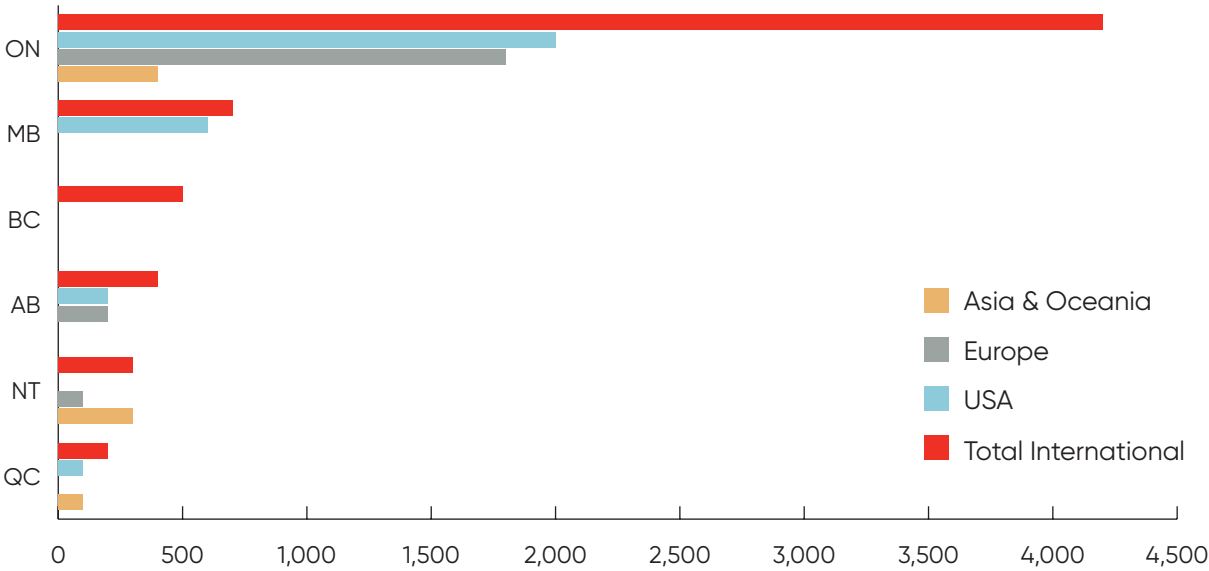


Ontario constitutes the main hub for international travellers in Canada whose trip involved a visit to Nunavut

In terms of international travellers in the rest of Canada whose trip involved a visit to Nunavut, Ontario (4,200) again tops the list followed by Manitoba (700) and British Columbia (500). It should be kept in mind that these do not represent absolute geographical counts of inbound

travel to Canada, but rather the most frequent other provinces visited when a trip included a stop in Nunavut. While a global destination in absolute terms, the low numbers in British Columbia can be explained by its relative distance from Nunavut.

Other Provinces Visited – International



Demographic Information

Visitor Breakdown – Canada

Place of residence	Visiting Nunavut
Nunavut	90,700
Ontario	14,200
Quebec	6,700
Manitoba	5,400
British Columbia	4,900
Alberta	4,600
Newfoundland and Labrador	2,600
Nova Scotia	2,000
Northwest Territories	1,100
New Brunswick	800
Yukon	600
Saskatchewan	400
Prince Edward Island	0

Visitor Breakdown – International

Place of residence	Visiting Nunavut
United States	4,600
Overseas:	
Europe	2,400
Asia & Oceania	800
Total United States/Overseas	7,800





Photo: Jason Nugent, Destination Nunavut

# Reason for Travel

## Most Canadian Visitors Come to Nunavut for Business Purposes

Over half of Canadian visitors to Nunavut (79%) come for business purposes. This result was most pronounced amongst visitors from New Brunswick (100%) and Quebec (94%). Given the proportionally high spend among Quebecois visitors, there may be an opportunity to grow the tourist market, though the low numbers of visitors who came to Nunavut for leisure purposes may be explained by the language barrier.

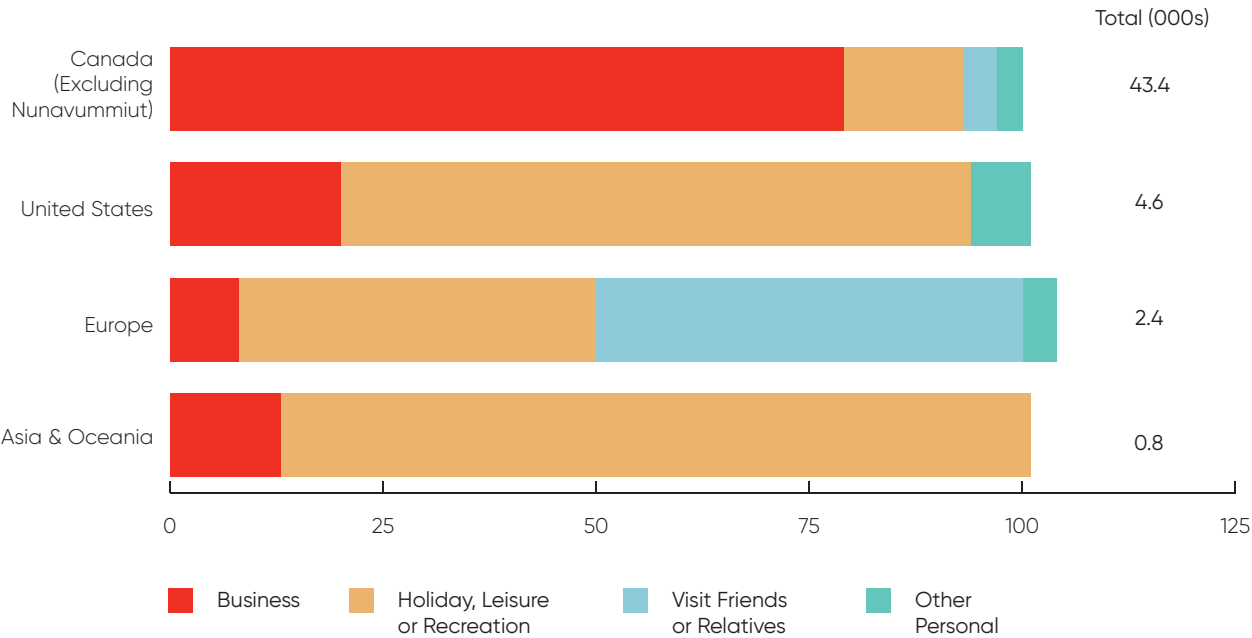
Overall, only 14% of Canadian visitors to Nunavut came for holiday, leisure or recreation. This is in contrast to 65% of international travellers who came for leisure.

This is easily explicable as for visitors who came to Nunavut for leisure purposes globally, Nunavut's unique

environment and communities may represent more value than it would for Canadian travellers. This could also play out in terms of travellers from very different climatic environments for whom the conditions in Nunavut represent a unique and novel experience, as opposed to Canadians for whom it may only be a more extreme version of the conditions they are accustomed to in their daily lives.

Visitors from the United States in particular skew towards visiting for leisure purposes (74%) and, given their high numbers relative to other international visitors, geographic proximity and high proportion of international tourist spend, could represent a very promising growth market for Nunavut.

Percentage International Visitors to Nunavut Purpose of Visit by Geography







# Regional and Community Visits

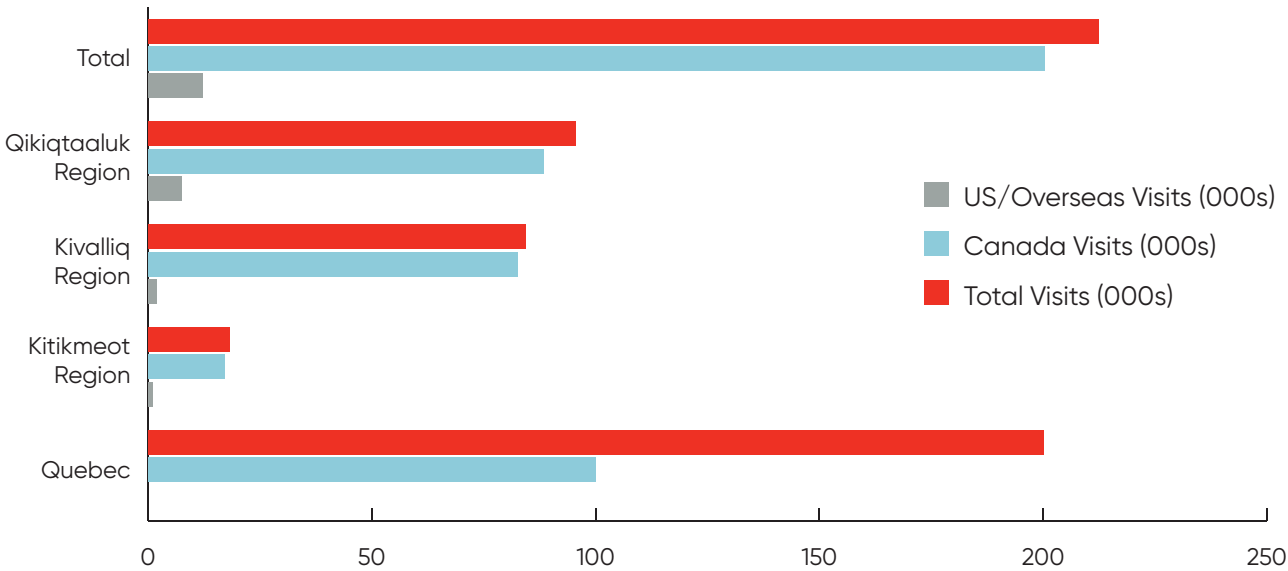
## Regional Visits

The Qikiqtaaluk and Kivalliq regions primarily drove visitation and tourist spending in Nunavut

In the context of this data, visits are defined at the community level and included visits by Nunavummiut travelling in their own territory. The Qikiqtaaluk region (95,600 visits) and Kivalliq (84,400 visits) reported the largest numbers of visits in Nunavut. The Qikiqtaaluk region also received by far the most visits by international visitors (12,100 compared to Kivalliq's 1,800). In this respect, The Qikiqtaaluk region represents a kind of regional brand ambassador for Nunavut, however, the diversity of the region and the local brands of other regions could be further emphasized to build a more holistic international brand for Nunavut.



Number of Visits by Region (000s)



**Of interest to DMO and Local Government** - Although currently fairly low profile, the tourism pull of Cambridge Bay could represent an opportunity to attract visitors and broaden the appeal of the region through some form of FAM tour or marketing campaign.

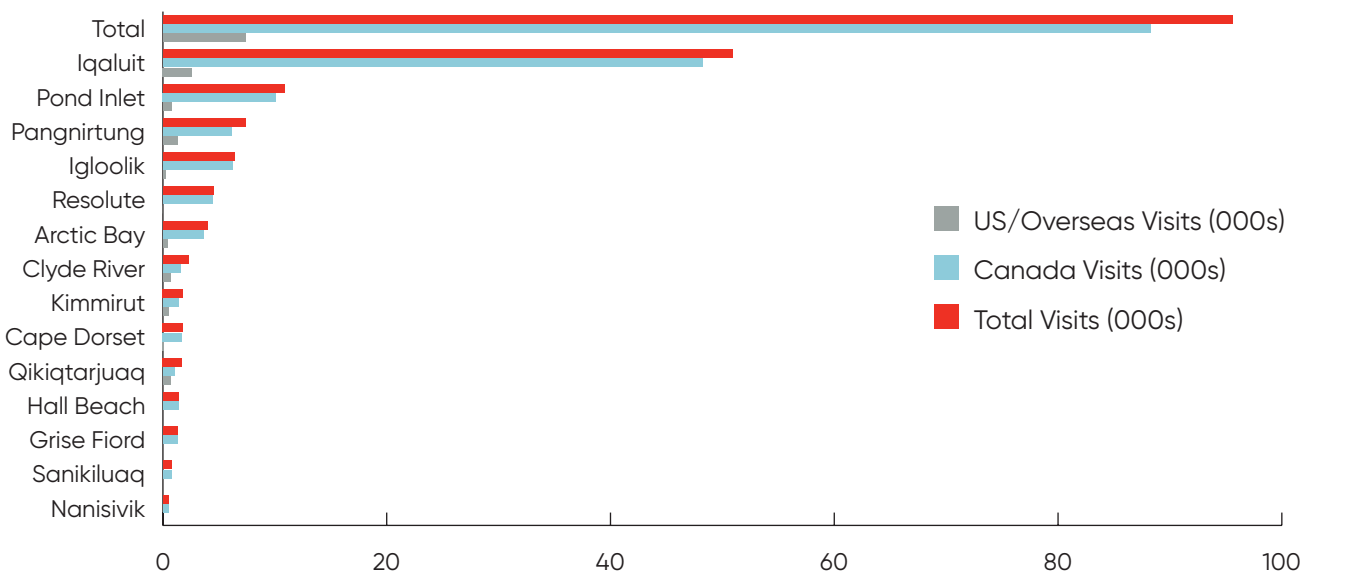
**Of interest to DMO** - The relatively high proportion of Canadian travellers visiting Nunavut for business purposes and accompanying high proportion of visitor spending may constitute an imperative to invest in MICE facilities and capacity to leverage this traveller demographic.

Community Visits

Travel spending by visitors to the Qikiqtaaluk region was the highest in Iqaluit

Within the Qikiqtaaluk region, just over half (53%) of all visits were to Iqaluit, the territorial capital. A total of \$75 million was spent in Iqaluit. After Iqaluit, the communities most often visited within the Qikiqtaaluk region were Pond Inlet (10,900 visits), Pangnirtung (7,400 visits) and Igloolik (6,400 visits).

Number of Visits by Community (000s) – Qikiqtaaluk Region



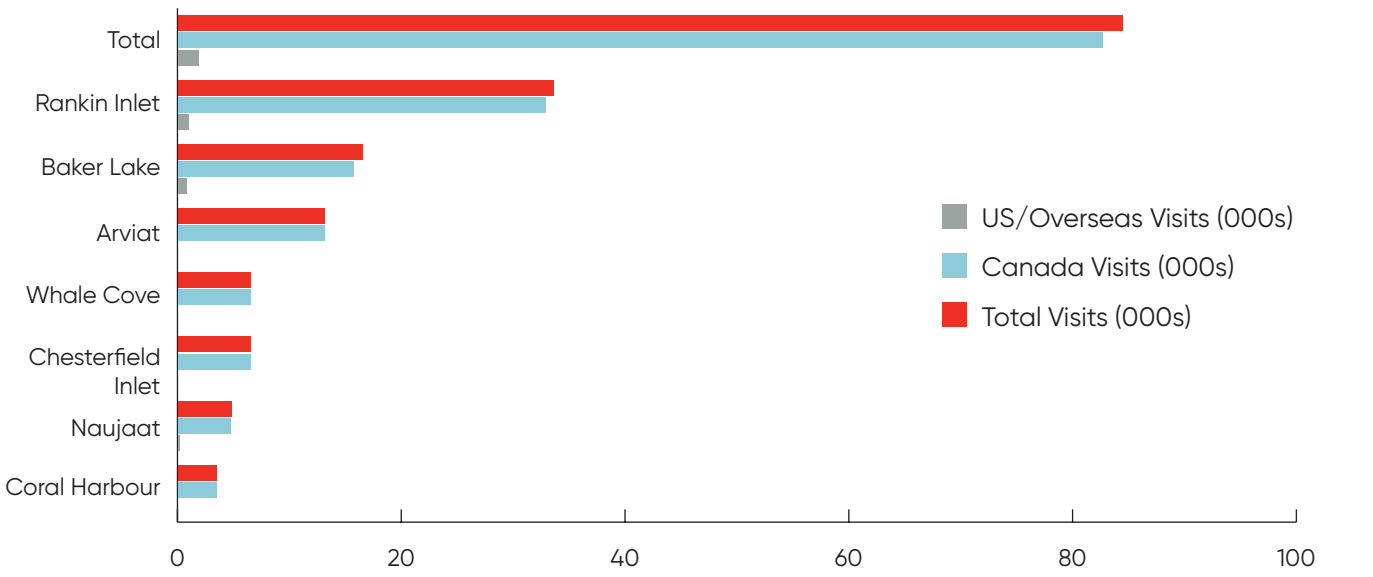
Rankin Inlet enjoyed by far the highest visitation and spending in the Kivalliq region

Rankin Inlet, at 33,600 visits and \$68 million in spending, was the community most visited within the Kivalliq region, followed by Baker Lake (16,500 visits) and Arviat (13,100 visits).

Cambridge Bay was the dominant community visited in the Kitikmeot Region

Compared to the other regions, Kitikmeot did not see a great deal of visitor traffic. However, relative to the rest of the region, Cambridge Bay saw a total of 12,400 visitors with fairly positive spending relative to the numbers visiting (\$36 million).

Number of Visits by Community (000s) – Kivalliq Region



Spending while in Nunavut

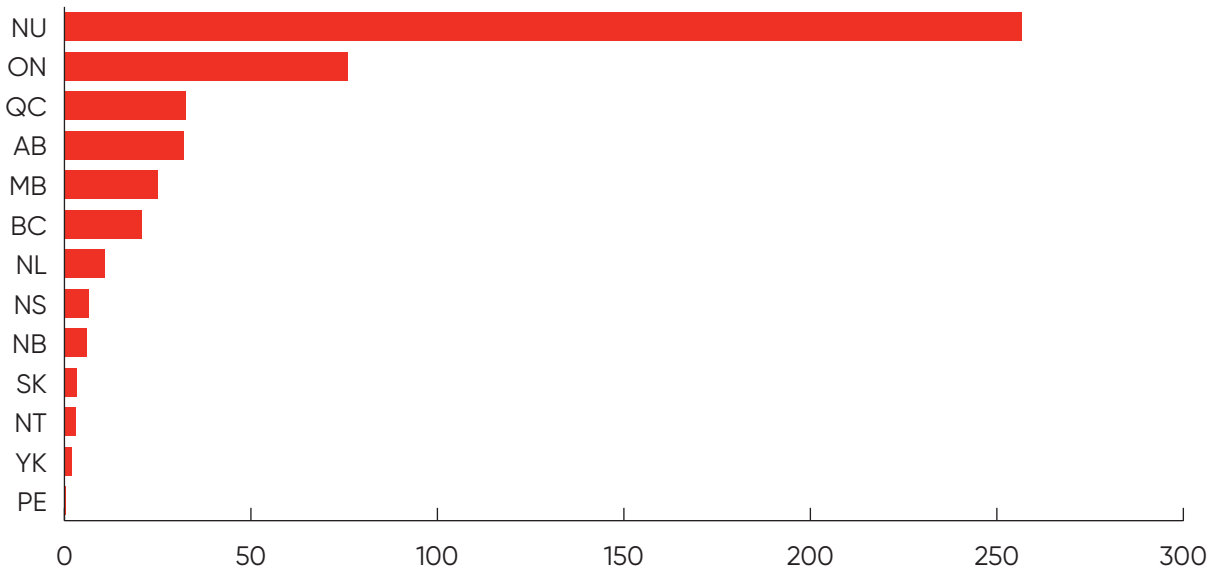
Spending Summary

In total we recorded a total spending of \$271,383,000 by incoming visitors from outside Nunavut both Canadian and international. Nunavummiut spending within the territory contributed an additional \$256,587,000.

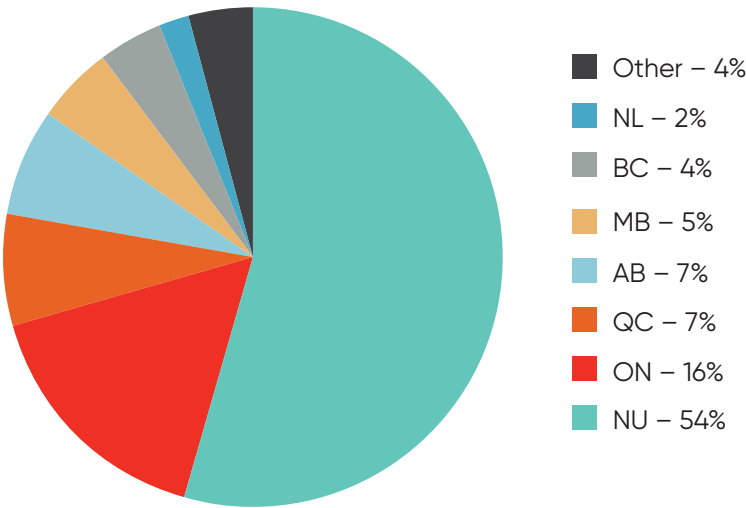
Ontarians contribute the highest spending among Canadian visitors

In terms of Canadian visitors, Including Nunavummiut travelling in their home territory, those from Ontario contribute the most to spending (\$76 million, 16% of total spending), unsurprisingly given their prominence in numbers. Quebecois and Albertan travellers in Nunavut contribute the second highest in terms of tourist spend despite Albertan visitors being only the 5th in terms of actual tourist numbers. This indicates a good target market for Nunavut to grow. Conversely, visitors from the Northwest Territories contribute only about 0.6% of domestic tourist spending.

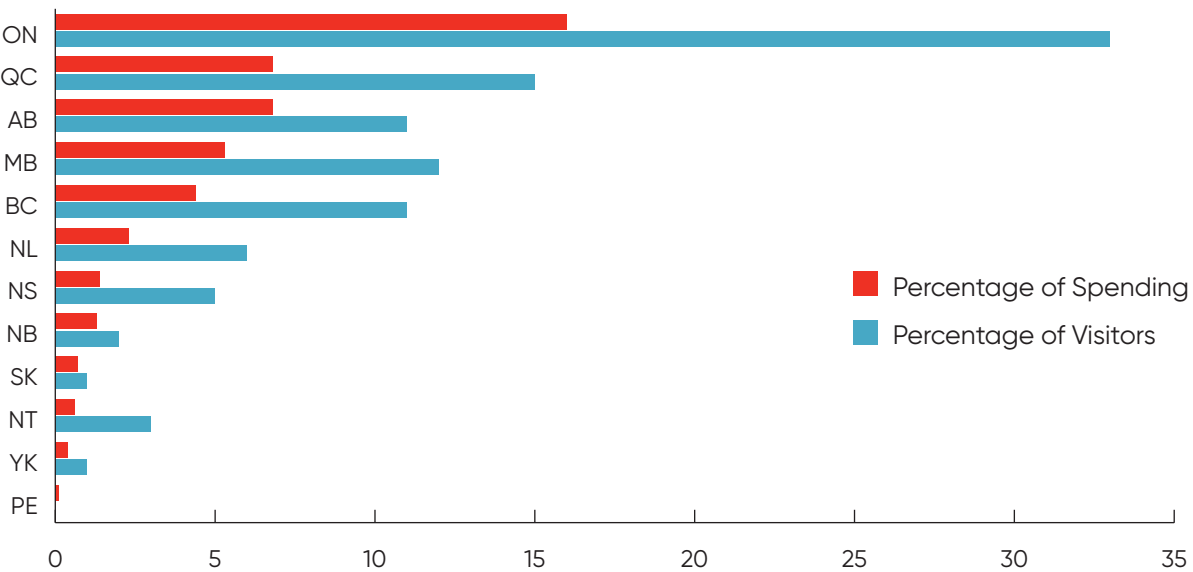
Canadian Expenditure in Nunavut by place of residence (USD millions)



Percentage of Nunavut Tourist Spending by Place of Residence



Percentage of Nunavut Tourist Spending by Place of Residence





Canadian visitors spend most on business trips in Nunavut

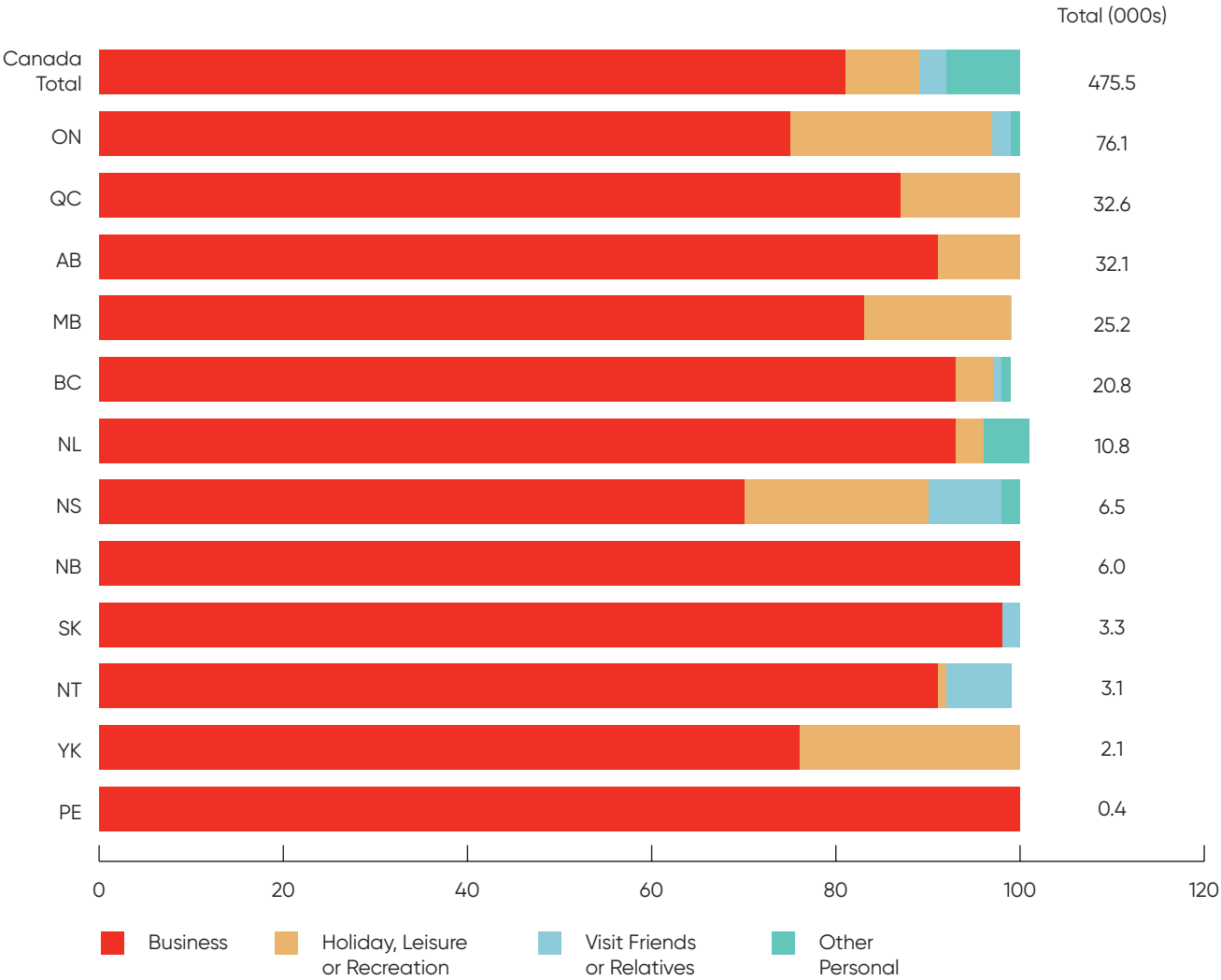
In terms of main trip purpose, Canadian travellers tend to spend most on business trips which is proportional to comparatively higher number of business trips (55%) than other categories. By contrast, international travellers spend by far the most (89%) on holidays.

The comparatively high spend of business travellers is largely driven by a very high proportion of spending from business travellers from Alberta (91%), Quebec (87%) and Ontario (75%).

USA visitors show high proportions of leisure visitors

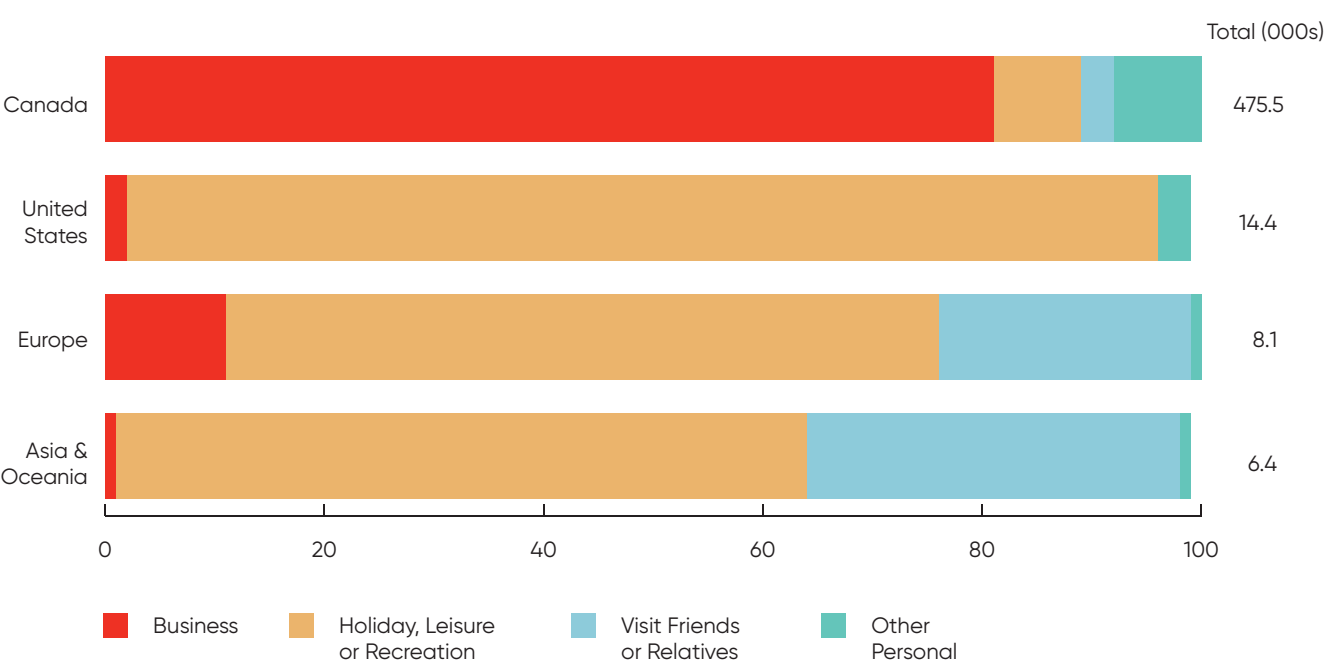
USA visitors show among the highest proportion of those visiting for holiday, leisure and recreation, 74% well above the overseas rate of 53%. An even more marked difference can be observed in the spending patterns of US visitors to Nunavut. While 74% come for recreational purposes, this proportion represents 94% of US travellers' spending in Nunavut.

International - Expenditure in Nunavut Trip Purpose (%)



**Of interest to Airlines, Operators and Travel Agents –** The relatively low number of international visitors to Nunavut can itself serve as a unique selling proposition (USP) to incrementally increase inbound international traffic. Nunavut represents a unique, rare and intensely different experience for travellers not merely seeking another stop on an established tourist route.

International – Expenditure in Nunavut Trip Purpose (%)





**Of Interest to Local Government and DMO** – Although the number of US visitors to Nunavut is around ten times less than Canadian visitors, this inbound segment should represent an area of focus for Nunavut – Nunavut is comparatively accessible to US visitors relative to other international visitors and US visitors able to travel that distance tend to have significant spending power. Further, US visitors visiting Nunavut spent almost as much in Nunavut as in the rest of the trip, likely indicating a willingness to spend highly in Nunavut as a unique premium destination, and a willingness to travel specifically to Nunavut as a single destination. Thus, when marketing to the USA, longer stays in Nunavut could be emphasized.

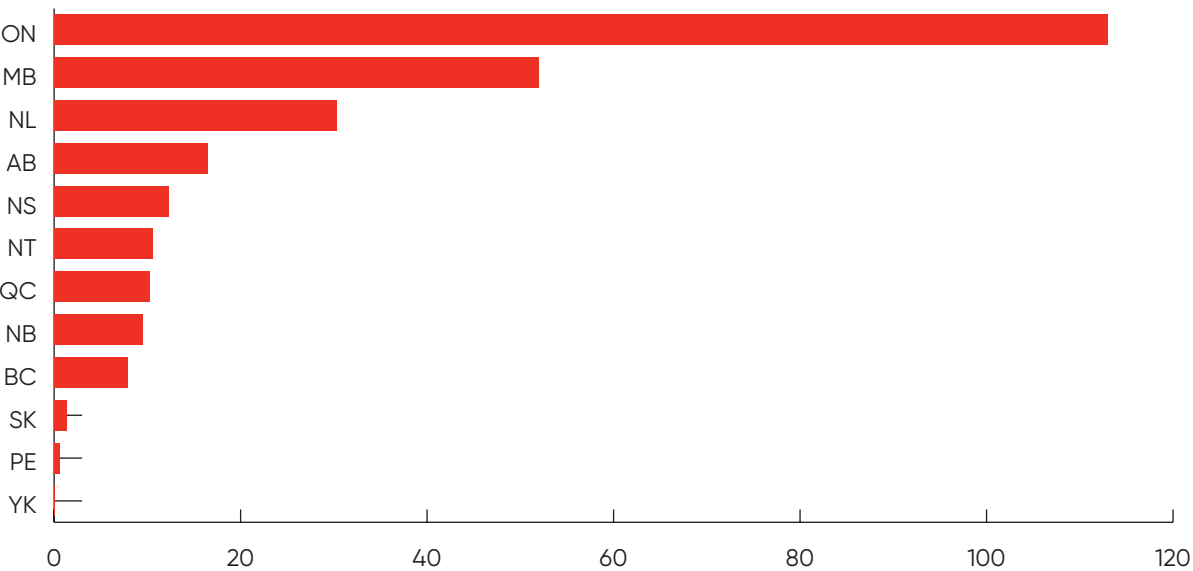


Spending Compared to Other Provinces and Territories

Canadian travellers spend the most in Ontario

In terms of spending in specific provinces, unsurprisingly, Canadian travellers whose trip included a visit to Nunavut spent by far the most in Ontario at \$113 million (15.3% of total recorded spend).

Canadian Expenditure by Place of Visit (millions USD)

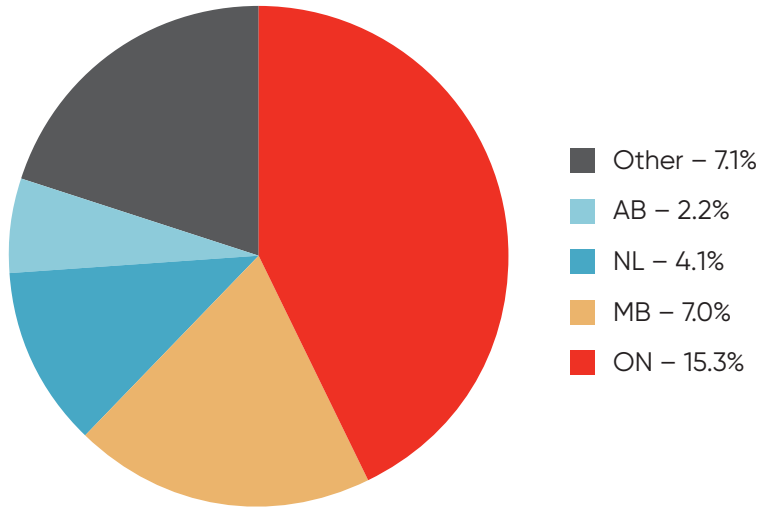




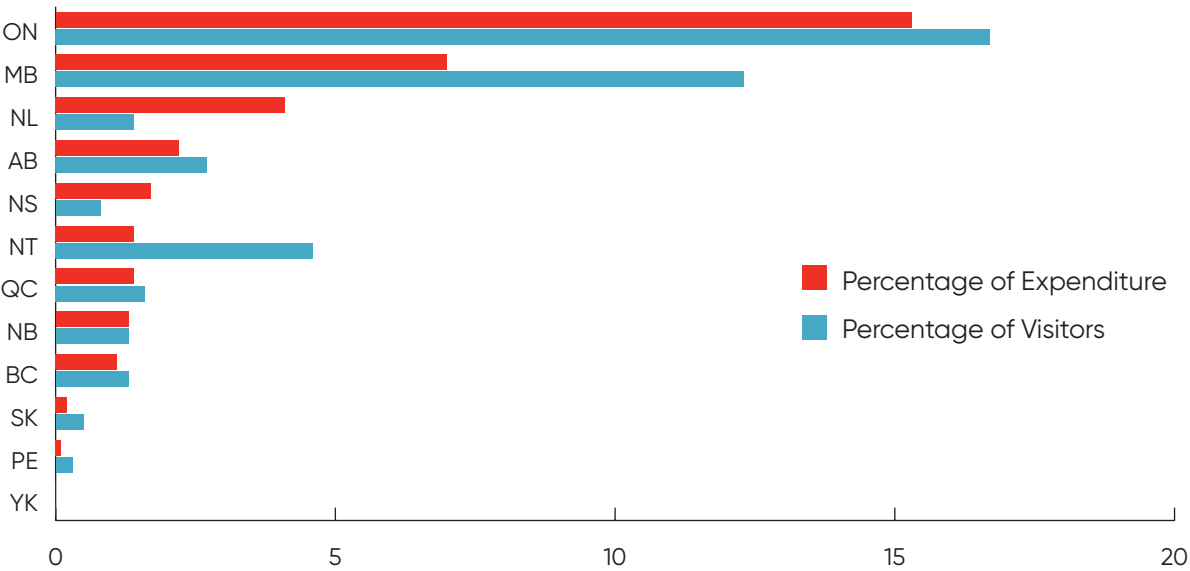
**Of interest to DMO –** As is reflected in the data, over the past few decades, Newfoundland and Labrador has cultivated a unique cultural and aesthetic brand, distinct from the rest of the country which attracts travellers to that destination specifically, to some extent regardless of their interest in the rest of the mainland. Given its unique nature, a similar strategy, though tailored to culture, climate and aesthetic of the area, could be cultivated for Nunavut, distinguishing itself as an authentic and unique destination, distinct from being a “Canadian” destination.



Percentage of Total Expenditure by Place of Visit  
Total – 740



Canadian Expenditure by Province Visited







**Of Interest to Tour Operators and Travel Agents** – For International travellers, while Nunavut represents a fascinating and diverse territory on arrival, the initial pull for visitation is less likely to stem from general interest but, more likely, from the desire to engage in their hobby, passion or sport of choice. Fishing, wildlife, hunting and camping are highly subscribed among international travellers and represent activities that can stimulate both local economic development in Nunavut and new opportunities to attract customers in the form of passionate enthusiasts who will then become ambassadors for the experience themselves.

# Activities while in Nunavut

## Visiting Friends and Relatives is the Most Common Activity for Visitors Overall

Eighty-seven per cent of visitors to Nunavut (86% of Canadians and 100% of international visitors) participated in some form of activity while visiting Nunavut. Overall the most common activity (41%) is visiting friends and relatives, though this is primarily driven by the higher number of Canadian than international visitors, and those engaging in this activity may be less inclined to participate in other activities if their main purpose of visitation is not strictly touristic.

Among Canadians sightseeing, wildlife and business/conference attendance are the primary activities

Canadian travel motivations differ from international visitors as their most chosen activities tend to be more passive in nature rather than adventure activities. Below visiting friends and relatives (41%), the most frequently participated in activities are sightseeing (38%), wildlife-viewing or bird-watching (30%) and attending business meetings, conferences or seminars.

Fishing is by far the most participated in activity among international visitors

In contrast to Canadian visitors, international visitors to Nunavut tend to participate in niche hobbies and outdoor activities. This is particularly the case for fishing (76%) followed by wildlife viewing/ bird-watching (38%), camping (35%) and hunting (35%). What is particularly noteworthy about these activities, is that very passionate individuals tend to participate in them and will often travel long distances and pay a premium to participate in that activity across the various locations on their “bucket-list”. Thus, the international visitor to Nunavut is more likely to engage in their particular passion. In the case of fishermen for example, the opportunity to go ice fishing around the Arctic Circle presents a novel expression of their particular hobby.







Photo: Jason Nugent, Destination Nunavut

Percentage of Activity Participation by Geography

	Total	Canada	US/Overseas
Visit friends/family	41	41	27
Sightseeing	37	38	20
Go wildlife viewing or bird watching	30	30	38
Business meeting, conference or seminar	26	26	8
Go for a medical or other health treatment	20	21	..
Dine out/go to a restaurant, bar or club	20	20	13
Shop	19	19	24
Hiking or backpacking	17	17	10
Museum or art gallery	15	15	7
National, provincial or nature park	14	14	12
Historic Site	14	14	19
Fishing	13	11	76
Aboriginal or Inuit event	11	11	16
Camping	10	10	35
Festival or fair	9	9	..
Other activity	7	7	10
Snowmobiling	6	6	12
All-terrain vehicle (e.g., ATV, quad, 4x4)	6	6	12
Hunting	6	5	35
Canoeing or kayaking	5	5	7
Boating (e.g., cruise, boat tour, other)	5	5	5
Beach	4	5	..
Take part in a film, television or commercial production	3	3	..
Performance such as a play or concert	2	2	..
Sport event as spectator	2	2	12
Play individual or team sports	2	2	..
Go to the movies	1	1	..
Cross country skiing or snowshoeing	0	0	..
Cycling	0	0	..





# Cruise Spending while in Nunavut

## Cruise Visit Spending Exceeded Initial Projections

A little over half (53.6%) of the passengers in the sample who disembarked in Nunavut communities visited Pond Inlet. This was followed by Iqaluit, Qikiqtarjuaq and Grise Fiord. Cruise visit spend during the survey period amounted to \$388,351, somewhat ahead of the pre-trip estimate of \$376,016. This is despite fewer passengers (3,404) arriving than initially anticipated (3,504) and the number of community visits (46) being lower than planned (59). While there were some shortfalls in the actual visitor numbers, the fact that spending still exceeded projections is an extremely encouraging sign for the development of the sector and region, and represents an opportunity for growth and capacity-building.

The divergence between pre- and post-trip spending estimates is largely driven by high spend and visitation at Pond Inlet

Looking at the differences in pre- and post-trip estimates for individual communities, it seems that Pond Inlet shows by far the biggest windfall in cruise visitor spending, with the final figure of \$246,565 being \$79,917 over the initial estimate. Looking at passenger visits we also see that Pond Inlet accounted for 100 for the 189.5 hours spent in Nunavut communities and by far the highest figure for passenger disembarkation (3,424, well over the next highest, Iqaluit's 479). If crew are included disembarkation numbers reach 3,974.

### Cruise Visit Overview

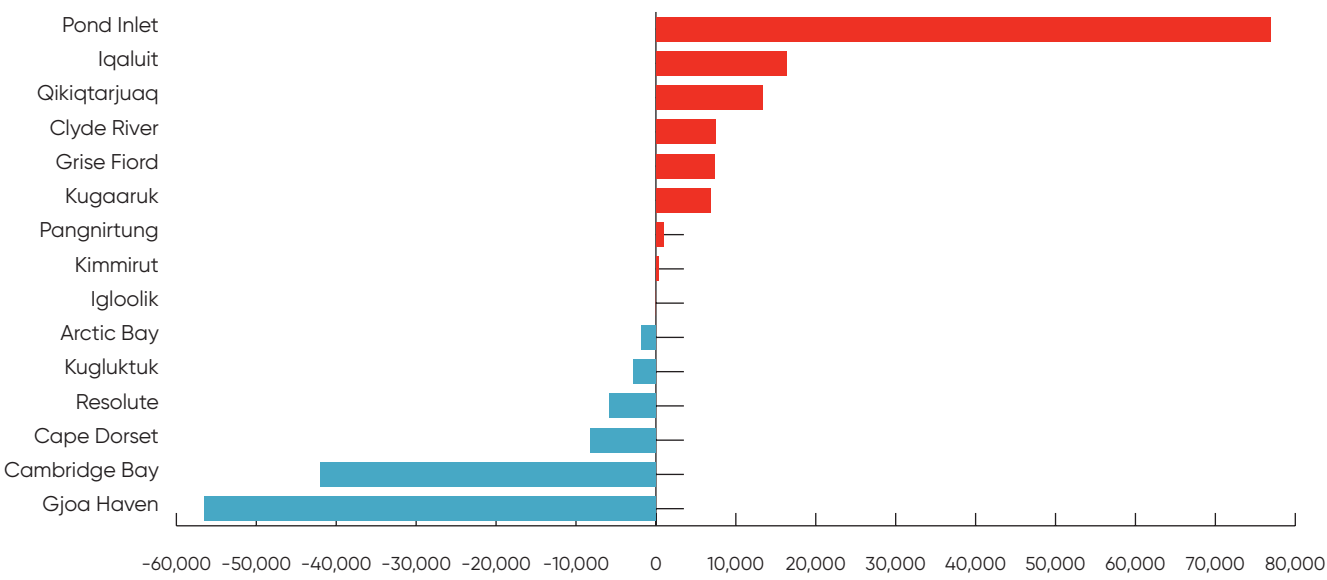
Pre-trip Estimate (\$ value)	376,016
Post-trip Actual (\$ value)	388,351
Anticipated Number of Passengers	3,504
Actual Number of Passengers	3,404
Number of Planned Community Visits	59
Number of Actual Community Visits	33
Number of Unplanned Community Visits	13
Number of Actual + Unplanned Community Visits	46



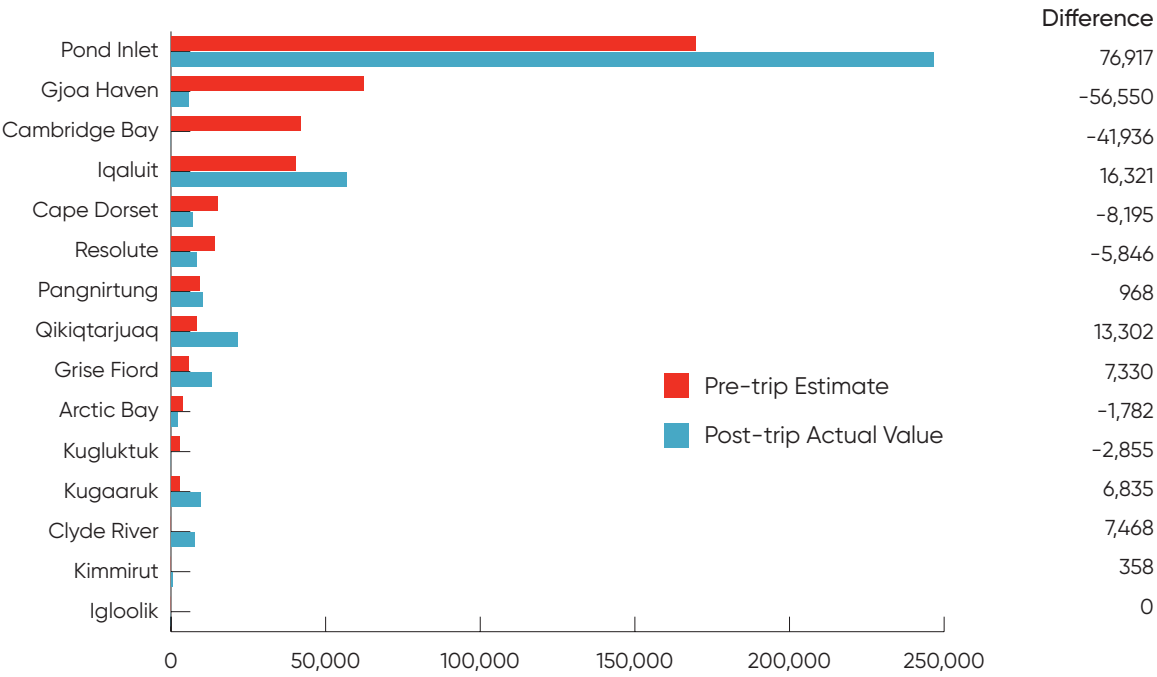
**Of interest to cruise sector and tour operators** – with expenditure from cruise passenger visits higher than projected despite slightly lower than anticipated actual passengers and community visits, and a number of “unplanned” community visits, Nunavut represents an opportunity to develop both cruise routes and community tours, both to increase the capacity of the region to absorb the spending power of cruise visitors and to accommodate interest in community visits and involve the communities themselves in the development of new revenue streams.



Difference between Pre-Trip Estimates and Post-Trip Actual Value

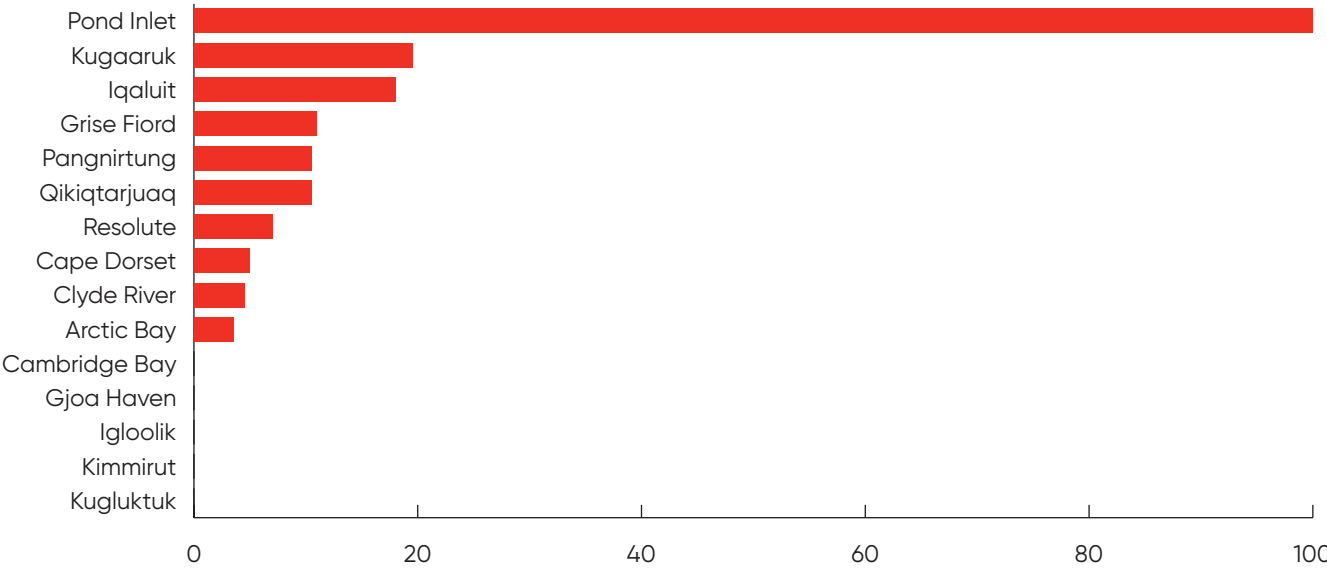


Post Trip Value vs Pre-Trip Estimate



Time Spent in Community (Hours)

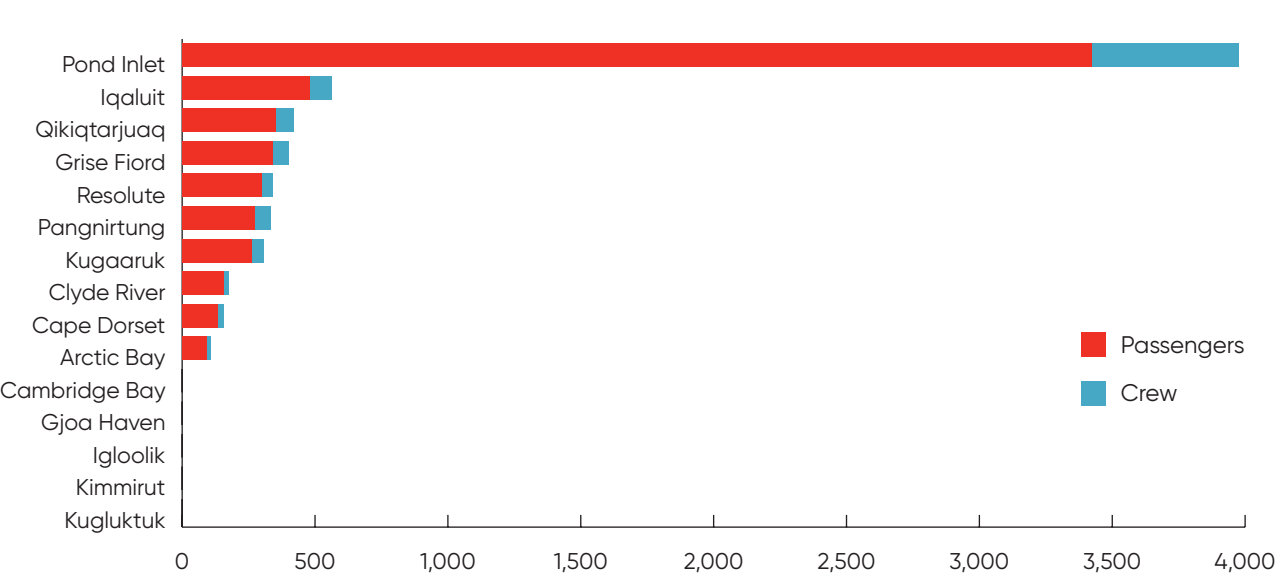
Total – 189.5



Passengers Disembarked

Total Passengers – 5,807

Total Crew – 970



**Of interest to cruise sector** – While weather conditions proved challenging to cruise itineraries this year, the operators who were most successful were those who were able to build flexibility into their itineraries, replacing cancelled community visits with substitute visits and driving their visits back up to initial projections. Thus, Nunavut offers significant opportunities for cruise operators who are creative and flexible in designing itineraries and have the resources to adapt to changing conditions.



Cambridge Bay and Gjoa Haven negatively impacted by planned visits not taking place

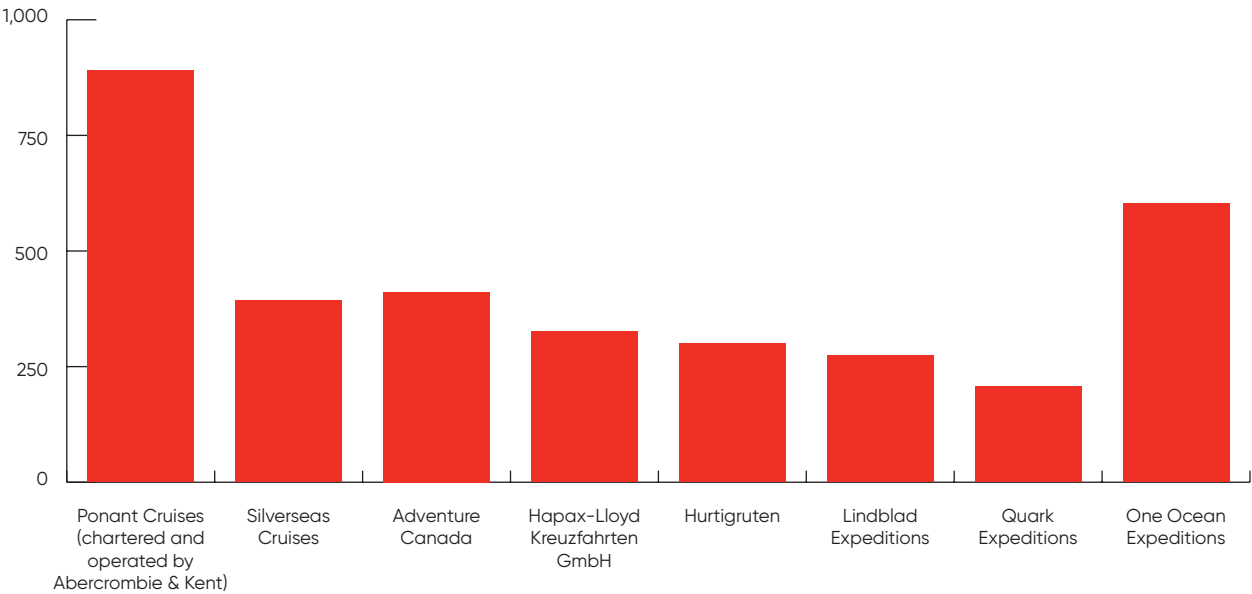
Among the voyages during this period, cruise operators planned 54 community visits. Of these, 55.6% or 30 visits took place as scheduled, and 24.1% were replaced by visits to alternate communities due to weather conditions.

20.4% of planned visits did not take place and were not replaced with visits to alternate communities. This impacted the communities of Cambridge Bay and Gjoa Haven the hardest, as they did not receive any cruise ship passenger visits in 2018. The total value of pre-trip estimated spending by cruise operators compared to post-trip actual spending represented a loss of about \$25,300 or 7% of total spending.

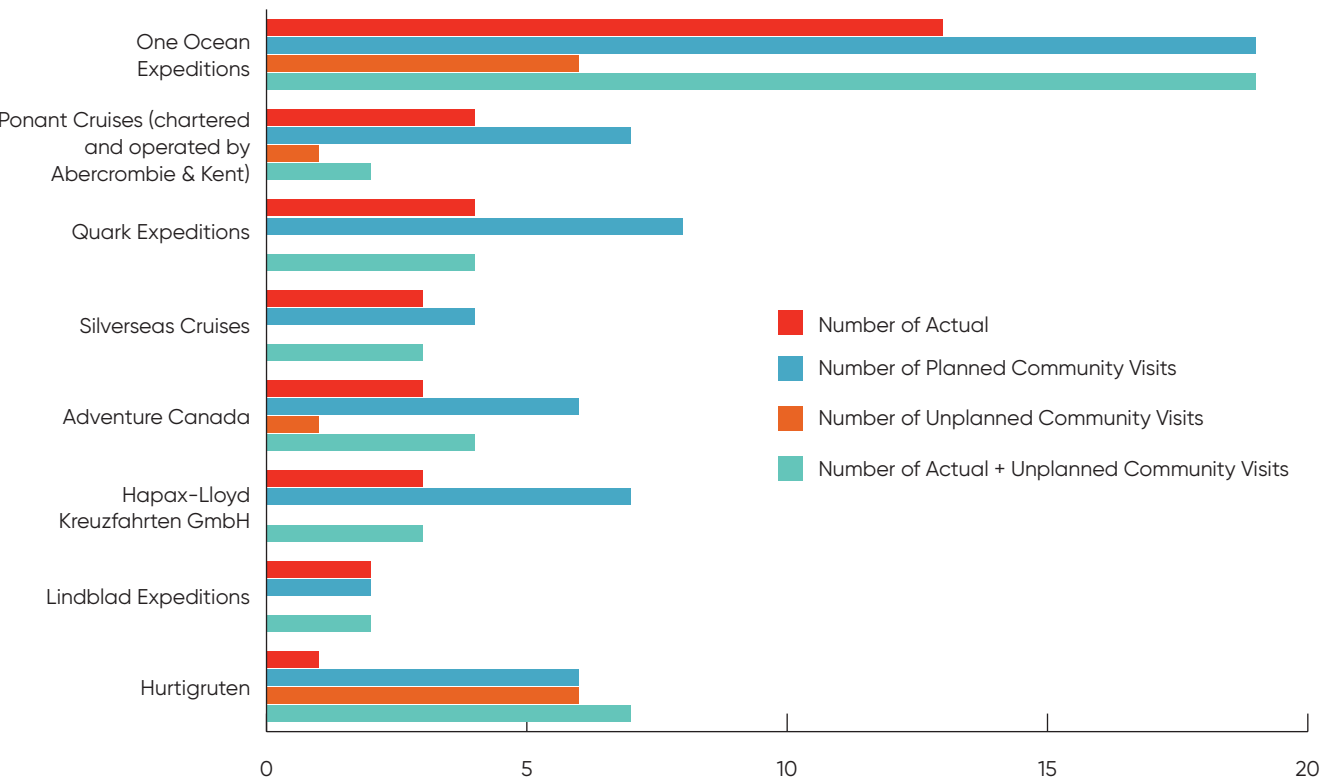
Abercrombie & Kent accounted for the most passengers while One Ocean facilitated the most community visits

By far the highest number of passengers were brought into Nunavut by Ponant Cruises, chartered by Abercrombie & Kent (890 in total, more than double the next highest of Silverseas Cruises at 393). However, One Ocean expeditions facilitated by far the highest number of community visits at 13 planned visits (though lower than the initially planned 19 though made up for by unplanned visits) while Ponant Cruises, despite their high passenger numbers, facilitated only 4. One Ocean were also the most flexible in terms of community visits with 6 unplanned community visits taking place, driving their numbers back up to initial projections.

Cruise Passengers – Total Number of Passengers



Community Visits







**Of interest to DMO** – Given the dominance of web-based sources of information, a well-designed website, web-based marketing campaigns and even social media marketing will be critical to driving both awareness and visitor traffic in Nunavut.

# Overall Experience in Nunavut

## Source of Information

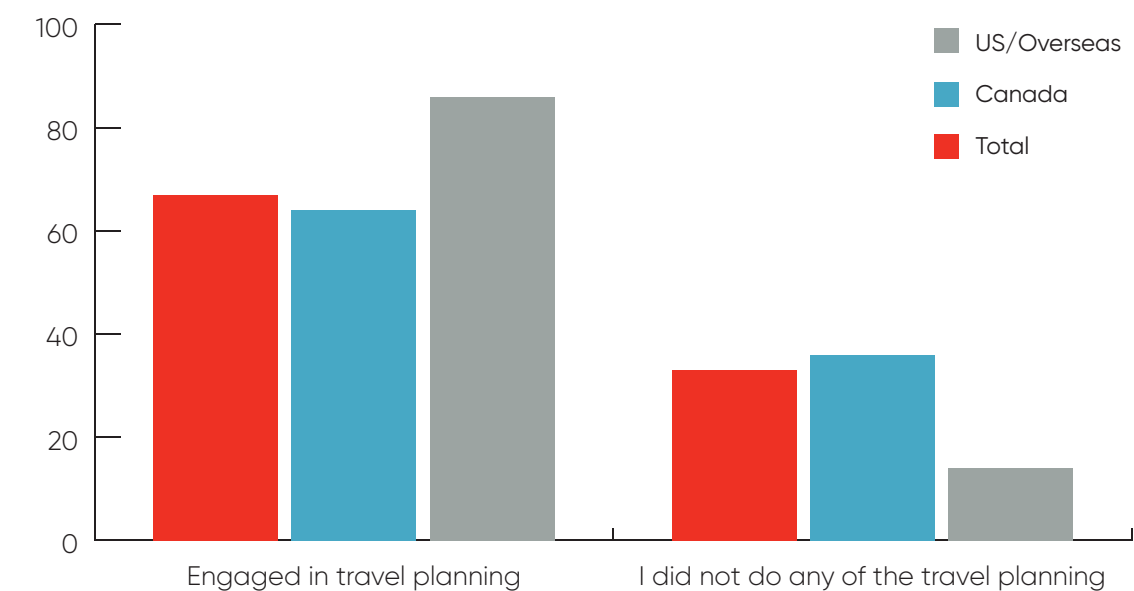
Travel planning is critical to international visitors

Unsurprisingly, international travellers are more likely to engage in travel planning than Canadians and, absent an ambient level of geographical and cultural knowledge that many Canadians possess, accessible, comprehensive and user-friendly sources of information will be critical in driving international inbound tourism to Nunavut.

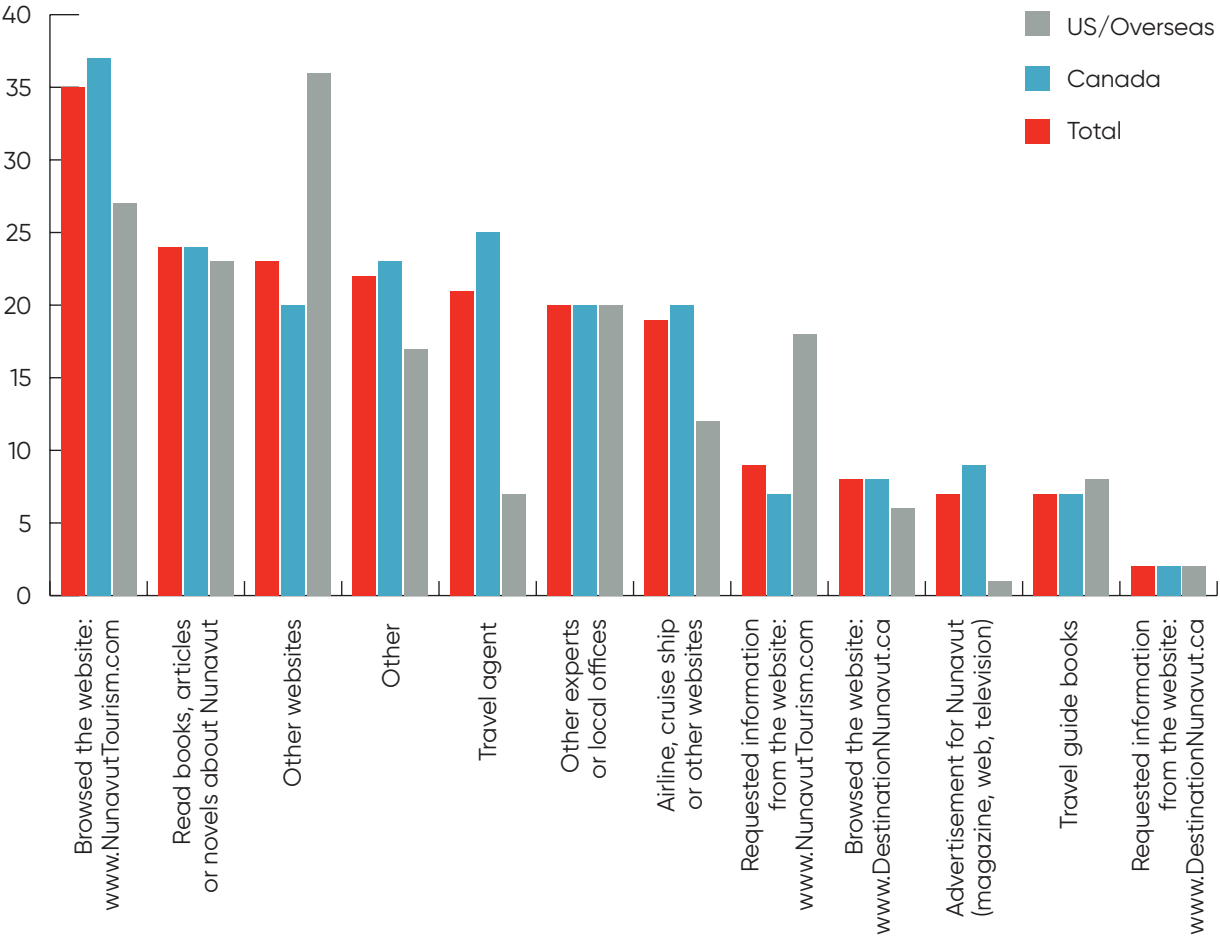
Online resources are critical in travel planning for visitors to Nunavut

Online resources are the dominant sources of information consulted by visitors to Nunavut, both Canadian and international. The Nunavuttourism.com website is the most-cited source overall more so among Canadians (37%) than international visitors (27%). International visitors tend more towards obtaining their information from other websites (36%). Canadians are more likely to consult travel agents (25%) and airline or cruise websites (20%) probably due to Canadian travels agents' higher likelihood of having the appropriate contacts and expertise. Both Canadians and international visitors are fairly likely to consult articles, books, novels and local experts and offices.

## Participation in Travel Activities



Sources of Information for Travel Planning



Overall Experience Rating

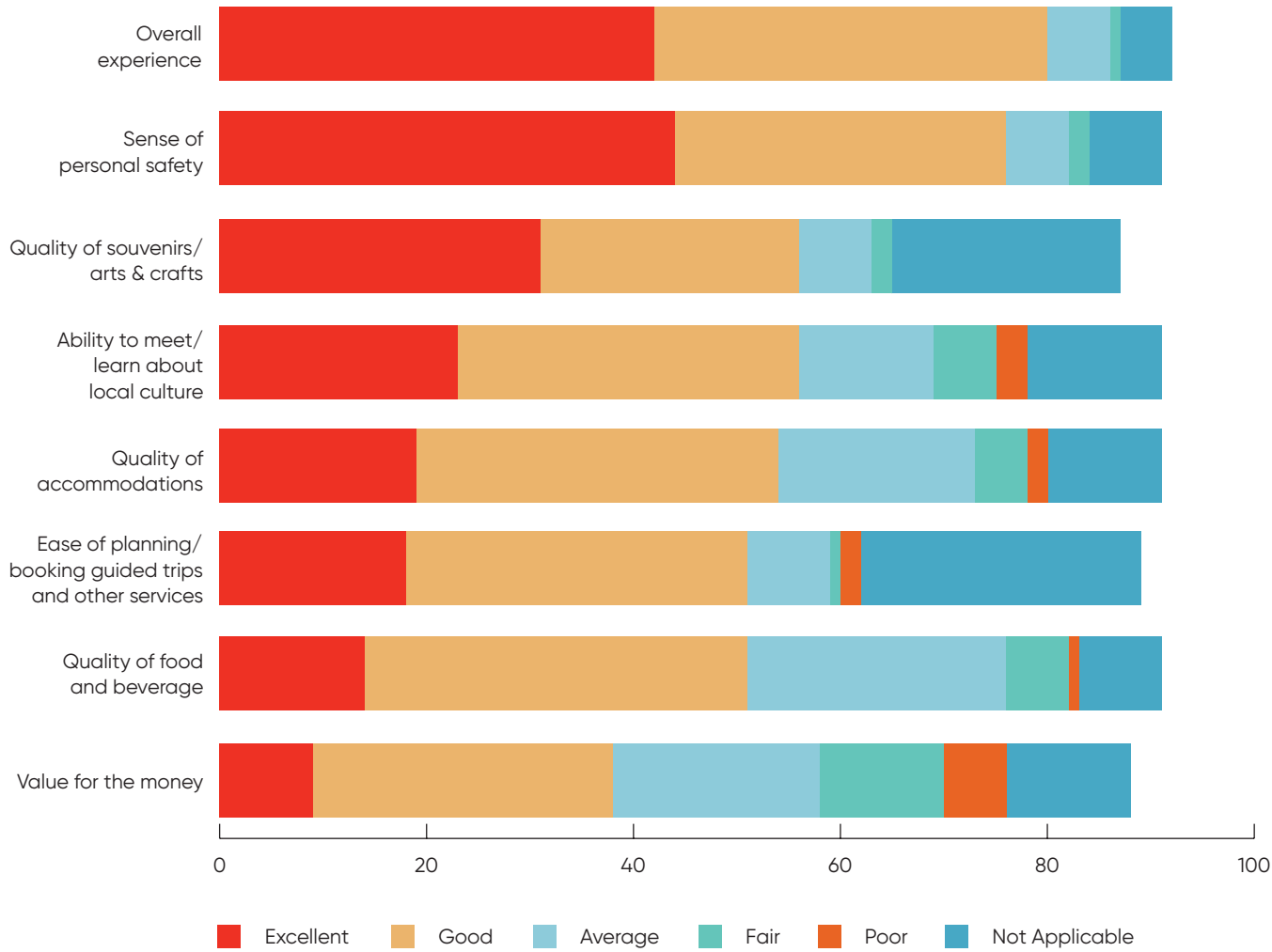
Nunavut is generally well-regarded among visitors, particularly around safety and arts and crafts

Visitors to Nunavut are generally positive about their experience, with the top-rated attributes being sense of personal safety (44% excellent, 32% good) and quality of arts and crafts (31% excellent, 25% good).

There are opportunities for growth and development around cultural experiences

Encouragingly, both Canadian and international visitors are positive about the opportunity to learn about local culture and traditions, though there were some very minor areas for improvement on this measure (3% poor and 7% fair for Canada, 3% poor and 1% fair for international visitors). Nunavut's unique cultural landscape is a built-in asset for the destination which should be refined and leveraged in order to further develop the destination brand.

Rating the Nunavut Experience





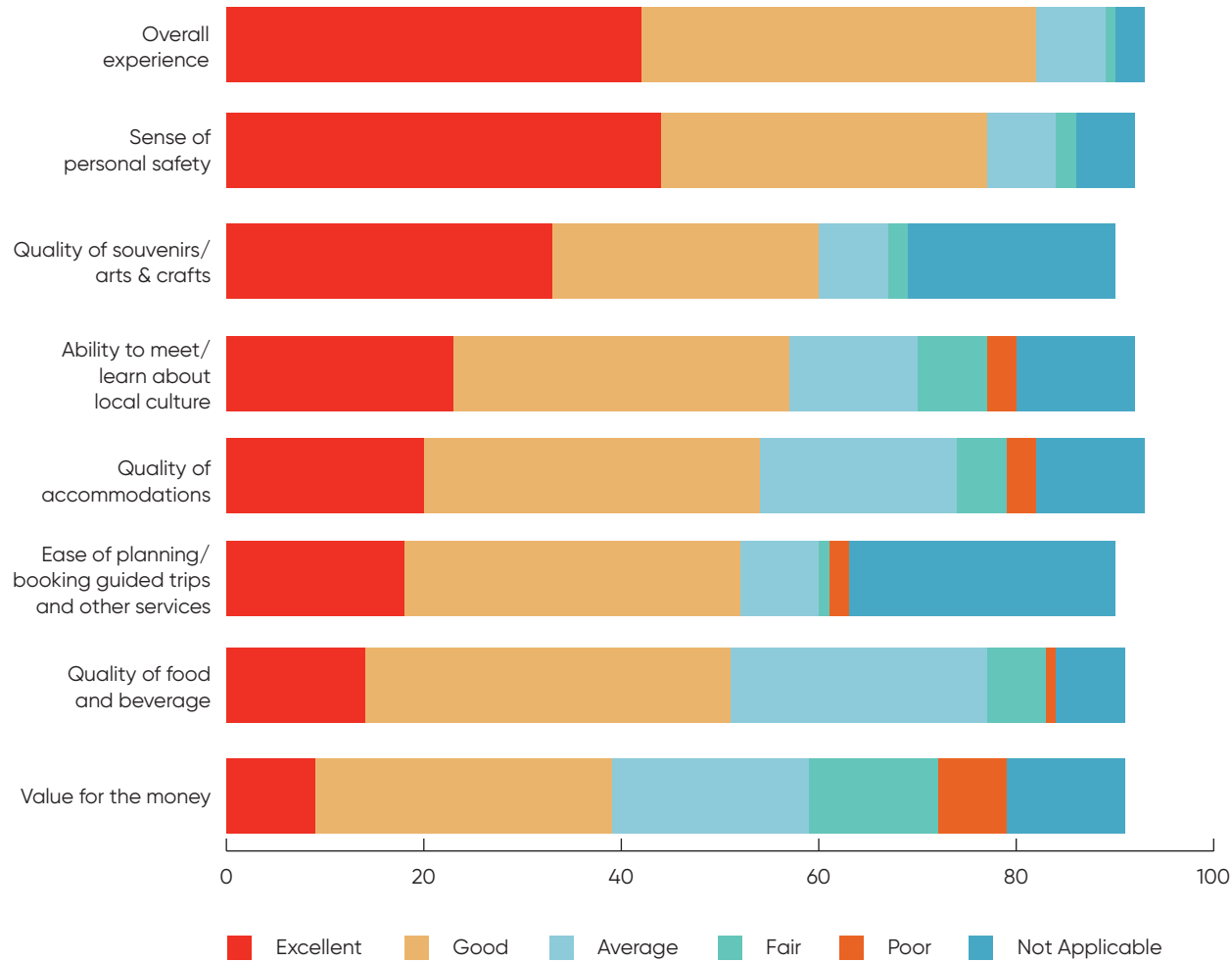
There are some challenges around perceived value for money and food and beverage quality

The destination fares less well around quality of food and beverage and value for money (with 12% fair and 6% poor). The result around value for money is perhaps unsurprising given the logistical challenges involved in supplying Nunavut with commodities and the resultant high costs. Food and beverage may also suffer as a result of this

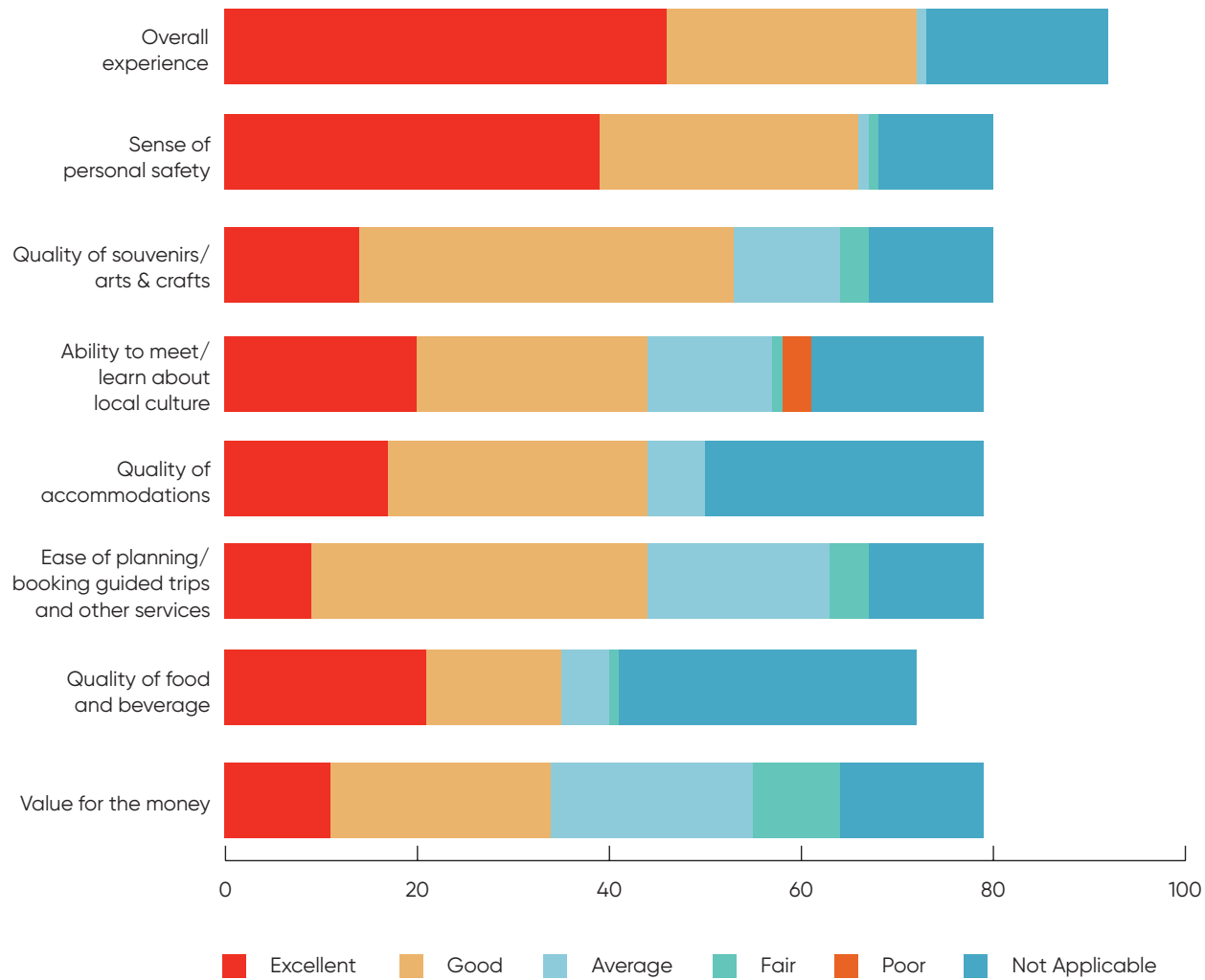
as respondents may be correlating quality with value for money, though this could also be due to unfamiliarity with local cuisines. This result is actually somewhat more pronounced among Canadian visitors, possibly due to lower inclination towards acknowledging “novelty value” and the fact that they are still spending money in-country rather than factoring in the costs associated with international travel.

**Of interest to tour operators –** The price premium in Nunavut may be a barrier to entry for some travellers. However, this could also present an opportunity to fill a gap in the market for affordable experiences, products and services. Given the increasing emphasis globally on “authentic” experiences and the degree to which Nunavut can benefit from this trend by leveraging its uniqueness, this cost-effectiveness could be achieved through Nunavut’s existing natural and cultural capital which could present myriad business opportunities for tour operators and stimulus to the local economy.

Rating the Nunavut Experience – Canada



Rating the Nunavut Experience – US/Overseas



Recreational visitors to Nunavut are the most positive about their experience

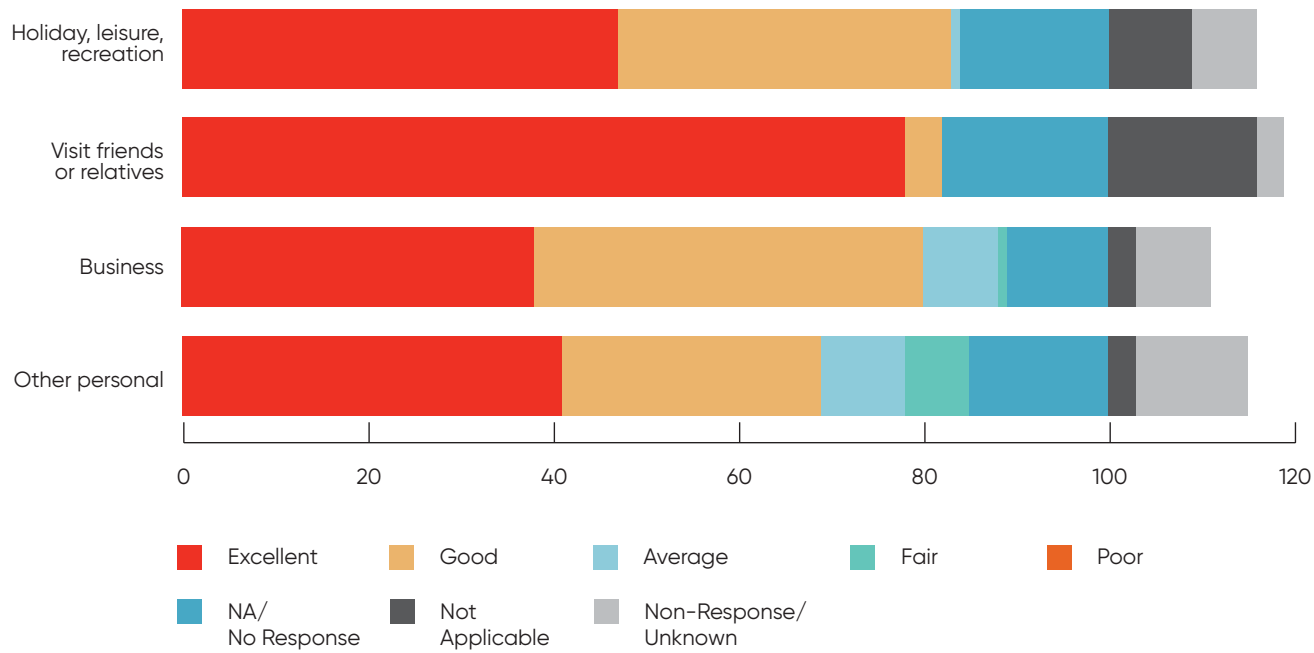
Looking at purpose of visit, those coming to Nunavut for recreational reasons are the most positive overall (47% excellent, 36% good) although visiting friends and relatives (VFR) visitors are far more likely to give an excellent rating (78%).

The vast majority of visitors report Nunavut either meeting or exceeding their expectations

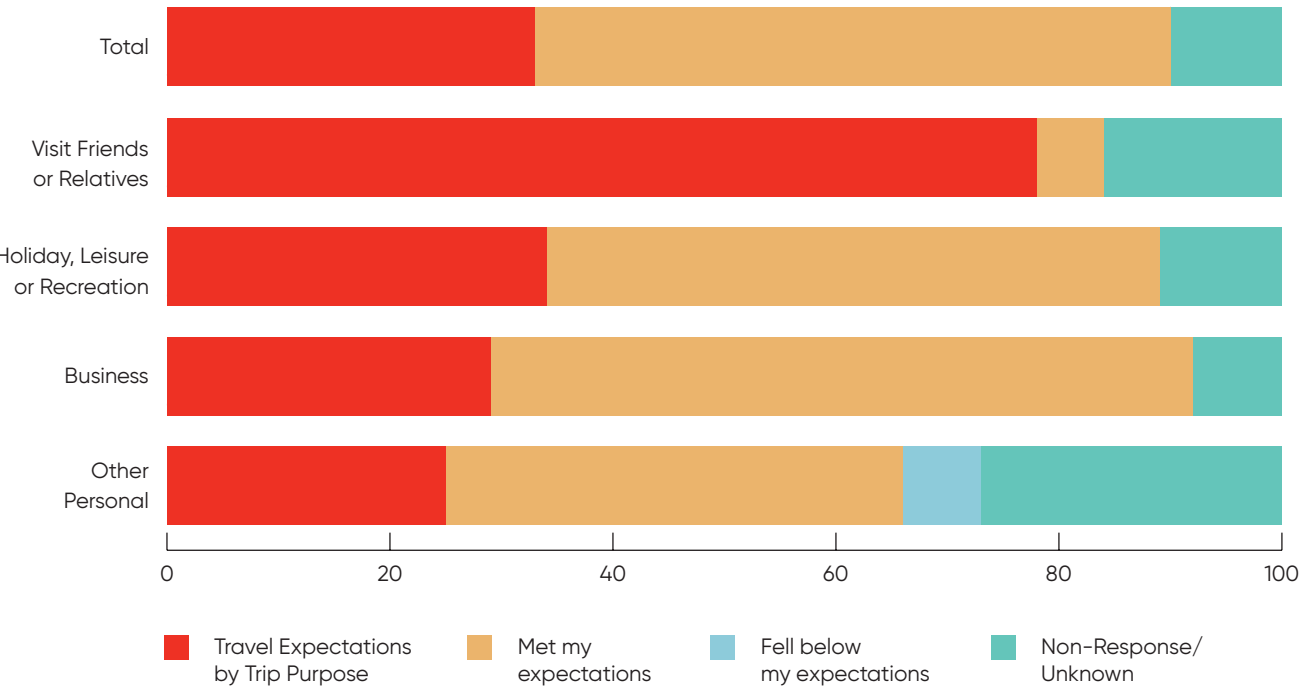
Encouragingly, very few visitors to Nunavut felt that their experience fell below their expectations, in fact only 9% of

personal visitations among Canadians and none among international visitors. Among Canadians VFR travellers are most likely to say the visit exceeded their expectations (90%), this may be because local connections were able to curate their experience for them, minimizing their role in the planning stages and reducing preconceptions about the kinds of experience they might expect. Interestingly, among international travellers, other personal visitors are more likely to report that the trip exceeded their expectations. This may be for similar reasons – if a visitor comes to Nunavut for non-recreational purposes, any positive experiences they do have may exceed expectations by default.

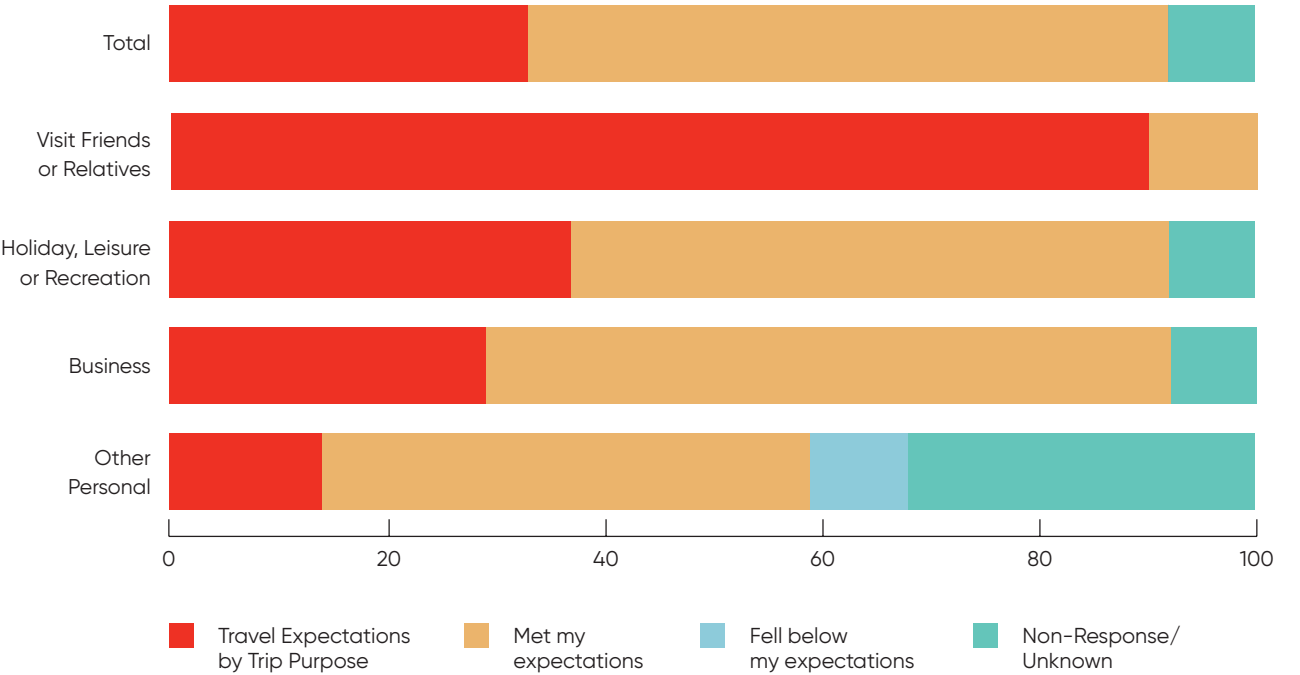
Rating by Purpose of Visit



Travel Expectations by Trip Purpose



Travel Expectations by Trip Purpose – Canada

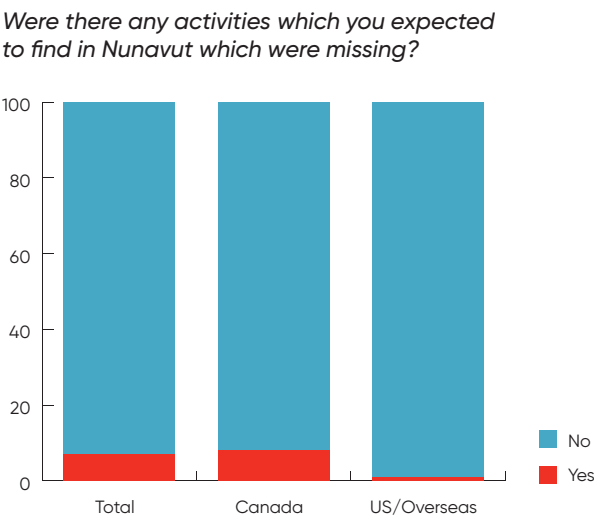




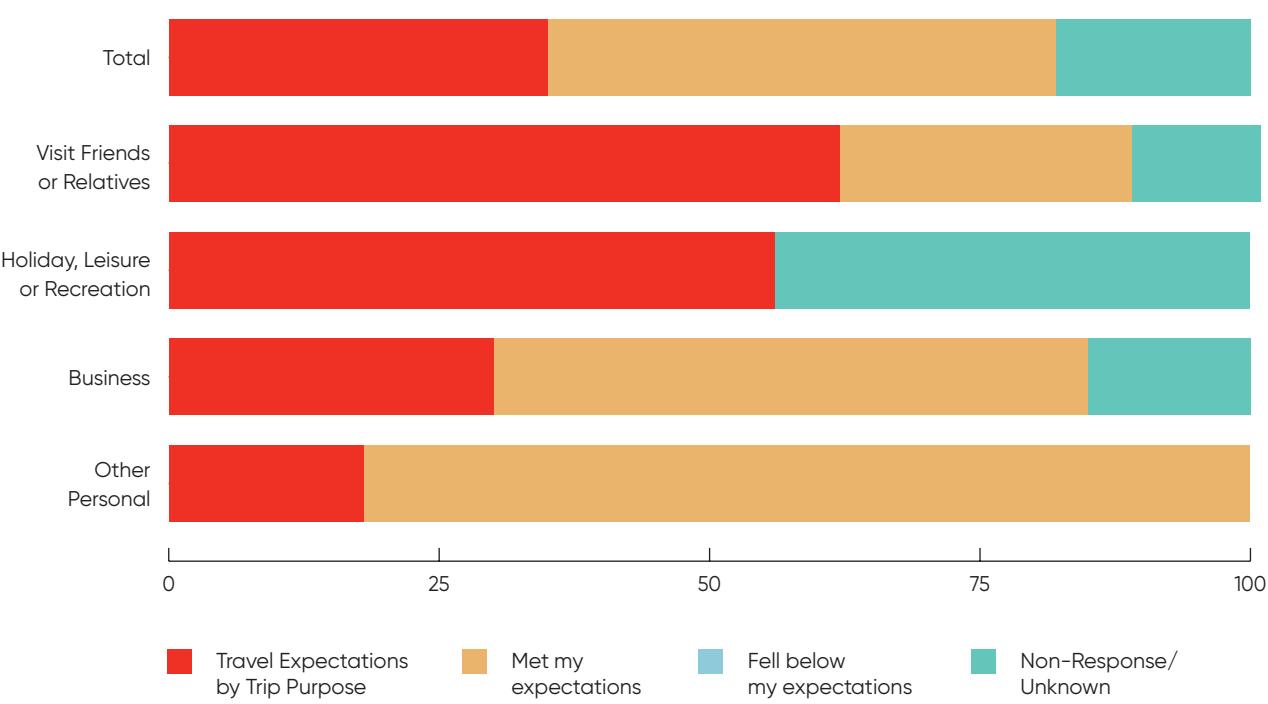
What Would Travellers Like to See?

Very few visitors felt any activities were missing from their experience

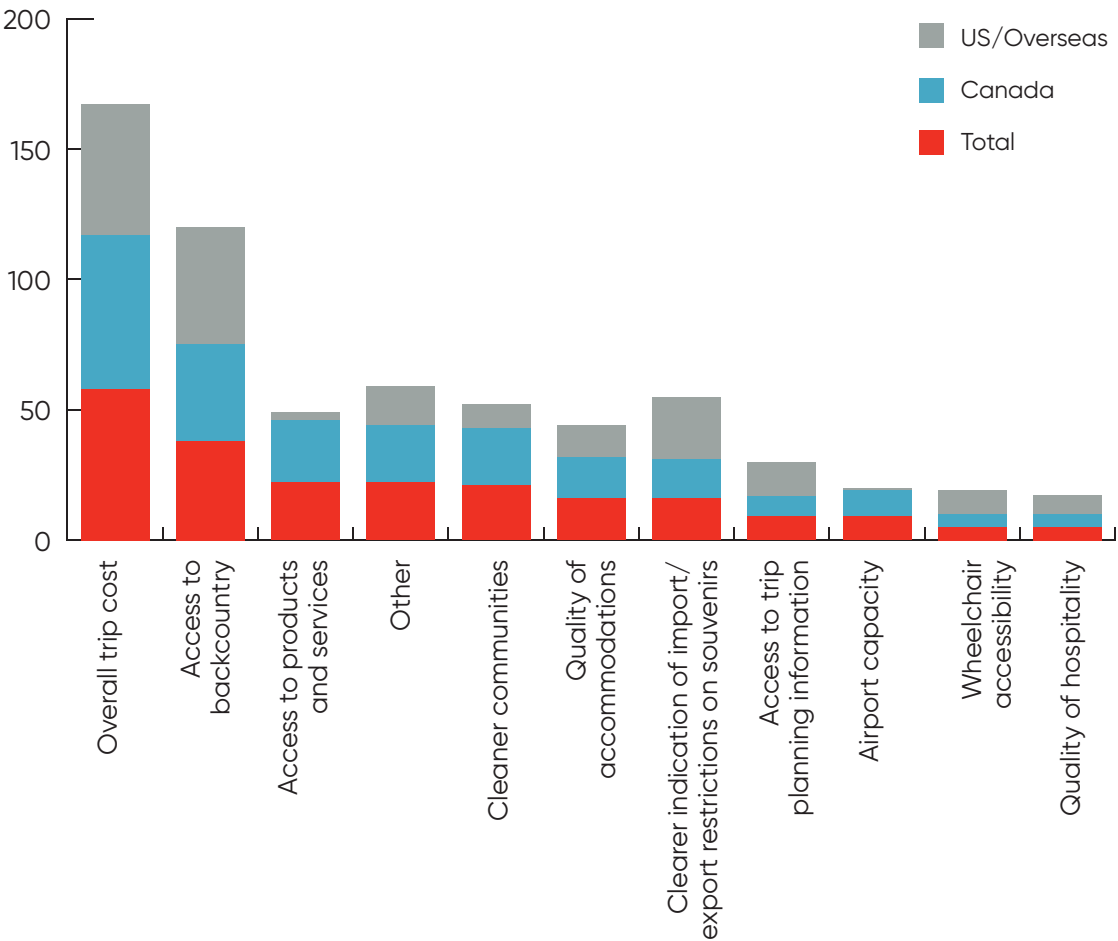
When asked if there were any activities they felt were absent from their visit to Nunavut, only 8% of the Canadian sample said yes and less than 1% of international visitors. However, that is not to say that there are not areas for improvement but that the selection of requisite activities are in place.



Travel Expectations by Trip Purpose – US/Overseas



Areas for Future Improvement





**Of interest to local government and tour operators** – In order to take full advantage of Nunavut’s natural capital, it may be necessary to overcome significant infrastructure and logistical challenges. Visitors to Nunavut are likely to be fairly adventurous travellers who want to access remote locations so there are likely to be many opportunities for tour operators, in partnership with the local infrastructure, to facilitate this access. Keeping in mind that this should be conducted under a sustainable tourism model, to not only preserve and protect the Arctic habitats and biodiversity but also to cater to adventurous travellers who more often than not are seeking authentic experiences in natural and preserved habitats.

### There are Areas for Improvement Around Cost and Access

In terms of areas for improvement, visitors are most likely to emphasize overall trip cost, more so among Canadians than international travellers (likely for the aforementioned reason that they are not working on an international travel budget). Access to back country is also mentioned by 37% of Canadians and 45% of international visitors. This is a crucial point as one of the unique selling proposition (USP) for Nunavut is its image as a “remote” destination and it may be frustrating for visitors seeking that experience to be confined to more populated areas due to limitations of logistics, transport and infrastructure. Further, access to products and services are also emphasized, this is again likely due to logistical challenges and not unrelated to the same factors driving cost concerns. 22% of visitors cite “other” and it may be instructive to delve into what these other areas are.

### Traveler Feedback

Nunavut leaves a positive impression and a desire to return among the vast majority of visitors

98% of Canadian and 100% of international travellers stated that would like to visit Nunavut again in the future. This is a resoundingly positive result speaking to Nunavut’s unique offering as a destination. Although some degree of recent visitation bias should be factored in, it nonetheless restates the opportunity Nunavut and its diverse communities have to become a world-renowned and inimitable destination brand.



Photo: Jason Nugent, Destination Nunavut



