



Tourism Potential in Canada's North

REPORT ON SURVEY RESULTS

JULY 2008

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Executive Summary

At its 2007 annual meeting, the Northern Development Ministers Forum (NDMF) identified the following theme for its August 2008 meeting: *Developing the Tourism Potential of the North*. A Working Group of NDMF member jurisdictions was subsequently convened, with a mandate to identify best practices and opportunities in developing and supporting tourism in the North. The NDMF Working Group designed a survey to be completed by NDMF member jurisdictions.

This report uses survey responses to address the five agreed upon objectives: 1. Profile current tourism marketing initiatives; 2. Profile current product and infrastructure development activities; 3. Identify human resources best practices; 4. Identify opportunities in research and planning; and, 5. Profile partnerships with Aboriginal peoples.

Survey respondents indicated a strong degree of consensus around key challenges and opportunities, and a healthy diversity of practices being undertaken to foster and support tourism. Respondents demonstrated shared expectations of growth in several emerging sectors, including eco-tourism, experiential tourism, adventure tourism, cruising, Aboriginal tourism, and learning or cultural tourism. Opportunity was

seen for both the traditionally busy summer season and for the winter season. Some respondents also anticipated continued growth in traditional sectors: sport hunting, fishing and general touring travel.

Among the tourism-related challenges cited by respondents are:

- Inadequate transportation infrastructure
- Increasing national and global competition
- Scarcity of “market-ready” local products
- Difficulty attracting and retaining skilled labour
- Insufficient and uncoordinated marketing resources.

Despite these challenges, a number of promising opportunities were identified by respondents: a focus on emerging growth sectors, a rising global awareness of the North and its people, the awareness and product marketing opportunities provided by the 2008 and 2010 Olympics, and the immense potential to access new audiences through web-based channels.

Northern Canada has significant tourism assets including UNESCO World Heritage Sites and other world-scale attractions and experiences.

The Strength, Weakness, Opportunities and Threat (SWOT) analysis identifies core assets and strengths, weaknesses, opportunities and threats in key areas: access, product and market development, destinations, marketing, training and community readiness and aboriginal community engagement.

Best Practices cited by respondents often reflected partnerships with other levels of government or with industry, to build capacity or leverage marketing resources. Examples included: The Northern Ontario Tourism Marketing Partnership (a government/industry marketing collaboration), 'Look Up North' (regional marketing campaign supporting Yukon, NWT and Nunavut), Manitoba's Aboriginal tourism training program (a government/industry training collaboration), collaborative training in Saskatchewan and the Yukon Tourism Training Fund (government-funded training support for businesses and individuals).

Among the healthy diversity of practices being undertaken to foster and develop tourism, many are best practice examples related to promising opportunities. For example, the opportunity identified to access and market to audiences

through web-based channels found expression in operator best practices such as nahanni.com (winner, overall Best in Show at 2007 CTC e-tourism awards).

Best practices in identified growth sectors include: eco-tourism - Bathurst Inlet Lodge (Nunavut), the Boreal Centre for Bird Conservation on Lesser Slave Lake (Alberta) and polar bear watching (Churchill Manitoba); experiential tourism – Aurora tourism (NWT); Adventure tourism (hard/extreme) – Yukon Quest, Rock and Ice Ultra (NWT), Cain's Quest (Labrador); Adventure tourism (soft) – Great River Journey (Yukon) and the Iron Horse Trail (Alberta); Cruising – Norweta (NWT) and Cruise North Expeditions (Nunavut and Québec/Nunavik); and Aboriginal/cultural tourism – Squamish Lil'Wat Cultural Centre, Ksan Historical Village (all British Columbia), Fort William Historic Park (Ontario), Pow Wows (across Ontario and the Prairies) and Voyager canoe races (Saskatchewan).

A range of best practice initiatives holds promise to address common challenges: transportation infrastructure (Yukon airport expansion and partnership to build charter/air traffic for tourism); visitor expectations for 'clean, pristine wilderness' in remote communities (Nunavut 'Trash Talking' initiative to clean-up/beautify communities); and, off-season/winter tourism marketing ('Storm watching' on the west coast of Vancouver Island – Tofino).

1 Introduction to the Northern Development Ministers Forum

Northern Canada includes a mix of the Cordillera, the Plains and the Great Canadian Shield, for a total of over two thirds of the Canadian landmass. In comparison, the population is proportionately much less.

The Northern Development Ministers Forum (NDMF) was established in 2001 to advance the diverse and common interests of Northerners in Canada while raising awareness among decision-makers and the public about the accomplishments, contributions and potential of the North.

NDMF member jurisdictions include northern representatives of the governments of British Columbia, Alberta, Yukon, Saskatchewan, Manitoba, Nunavut, Ontario, Québec, Newfoundland and Labrador, Indian and Northern Affairs

Canada as well as the Northwest Territories.

NDMF strategic objectives are as follows:

- 1) Determine strategic actions, act and provide leadership with regard to these actions in order to promote Northern development.
- 2) Reinforce the North's position among regional and national priorities.
- 3) Reinforce cooperation between northern provincial and territorial authorities and the Government of Canada.
- 4) Exchange information.
- 5) Organize an annual conference as a forum for Northern Development Ministers to establish priorities.



2 Introduction to the Northern Tourism Project

Northern jurisdictions share many of the same challenges and opportunities related to tourism. At the 2007 NDMF annual meeting in Ottawa, Ministers approved “Developing the Tourism Potential of the North” as the theme and priority project for the August 2008 Forum, to be held in Yellowknife.

A Tourism Project working group of NDMF member jurisdictions, led by the Northwest Territories, included Saskatchewan, Manitoba, Nunavut, Newfoundland and Labrador, Indian and Northern Affairs Canada. It was charged with a mandate to document best practices and the current state of the art in developing and supporting the tourism industry in the North.

The working group developed a questionnaire (Appendix A: Survey) to solicit input from each NDMF member jurisdiction regarding tourism in their Northern regions, and provided guidance in the development of this Report.

Findings from the survey, summarized in this report, will provide context for Ministerial discussion at the 2008 Forum and will be presented to governments and agencies in an effort to raise awareness of challenges, opportunities, and need for greater focus on northern areas. The August 2008 Forum should provide an ideal venue to generate the necessary communication and support for these efforts.

Report Objectives

An analysis of the answers to the following survey questions formed the basis of the Report.

Objective 1: Profile current tourism marketing initiatives.

What are the growth markets for Northern tourism? How do the different jurisdictions segment the market? What marketing campaigns have been successful? How is success defined?

Objective 2: Profile current product and infrastructure development activities.

What are the obstacles to product and infrastructure development? What approaches have been successful in overcoming these obstacles? How do different jurisdictions leverage private sector investment?

Objective 3: Identify human resource best practices.

What approaches are being used to train, certify and retain workers in the tourism industry? What is the best role for government to play?

Objective 4: Identify opportunities in research and planning.

How can governments partner with industry to provide relevant and timely information for tourism development?

Objective 5: Profile partnerships with Aboriginal Peoples.

How are Aboriginal Peoples capitalizing on the tourism industry across the North? How are they involved in planning, as entrepreneurs, providing investment and labour? How are they sharing their unique culture?

3 Methodology

A questionnaire was used to gather data for this report (See Appendix A: Survey). The questionnaire was developed by the NDMF working group to gather qualitative and quantitative information from the jurisdictions and address the objectives and questions cited in Section 2.

Data limitations include:

1. Reliance on self-reporting by respondents;
2. Data comparability restrictions; and,
3. Data availability restrictions for example, the proportion of Northern tourism activity, as compared to the provincial whole.

In March 2008, the questionnaire was circulated to a total of eleven recipients which were tourism or economic development departments of each NDMF member region, in addition to the federal government through INAC (who included input from the Canadian Tourism Commission), enclosed with a letter from the Deputy Minister, NWT Department of Industry, Tourism and Investment.

Completed surveys were submitted throughout March and April 2008 to the NWT as Chair of the working group and host for the 2008 NDMF annual conference. The response rate among survey recipients was 100%.

Preparation of a draft report was completed by a contractor in May 2008 for review by the NDMF senior officials working group. A follow-up was sent to each jurisdiction in early June requesting examples of their Best Practices. The final report was completed in July 2008 and incorporates survey answers, and Best Practices examples, received through June 30, 2008.





4 Survey Results

The following sections present a summary of questionnaire responses.

4.1 Sector Performance Overviews





The questionnaire responses presented limitations to developing an inclusive, fact based profile for northern tourism: British Columbia, Manitoba and Newfoundland and Labrador do not report Northern specific tourism; Nunavut reports a range; and, the reporting period varies for those jurisdictions that do report northern tourism data.

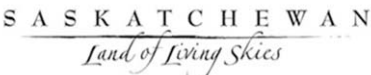





Nonetheless, there are some observations that can be made:

Southern Canadians are important to Northern tourism. The Canadian Tourism Commission reported a total of 30.4 million foreign visitors to Canada in 2007 with substantial numbers of these visitors focused on the southern cities and

southern tourist regions such as Niagara, mountain parks, Laurentians and the Maritimes.

Spending in the North by northern visitors is economically significant at an estimated \$ 2.45 billion, again led by Ontario, reporting spending by visitors to northern Ontario of \$ 1.7 billion.

Region	Provincial / Territorial Umbrella Brand	Annual Tourism (as reported by respondents)	% Northern Tourism
Yukon		\$192 million (territory-wide) 329,203 visitors (territory-wide) (2007 data)	100%
Northwest Territories		\$113.6 million (territory-wide) 63,500 visitors (territory-wide) (2006/2007 data)	100%
Nunavut		\$26 million-\$36 million (territory-wide) 13,000-18,000 visitors (territory-wide) (estimates based on 2006 data)	100%
British Columbia		\$11 billion (province-wide) (Northern only data not available) (data year not specified)	Not available
Alberta		\$315 million (Alberta North only) 1.5 m visitors 95% of visitors are from Canada (Alberta North only) (2004 data)	2004: 11.4% of Alberta visitors and 13.5% visitor spending in Alberta.

Region	Provincial / Territorial Umbrella Brand	Annual Tourism (as reported by respondents)	% Northern Tourism
Saskatchewan		\$125 million (Northern Saskatchewan only) 863,000 visitors (Northern Saskatchewan only) (2006 data)	9-11% of province-wide visitation and expenditure
Manitoba		\$1.42 billion (province-wide) 6.9 million visitors (province-wide) (2004 data)	Not available
Ontario		\$1.7 billion (Northern Ontario only) 9.8 million visitors (Northern Ontario only) (2004 data)	8-10% of province-wide visitation and expenditure
Québec		\$18 million (Baie-James, Nunavik only) 88,000 visitors (Baie-James Nunavik only) \$7.0 billion (province-wide) 28.3 million visitors (province-wide)	1.25% of province-wide expenditure
Newfoundland and Labrador		\$12 million (province-wide) 490,100 visitors (province-wide) (2007 data)	Not available
Government of Canada		\$16.6 billion (Canada-wide) 30.4 million visitors (Canada-wide) (2007 data)	Not available

4.2 Current Product Sectors and Market Segmentation

Product Sectors

Survey responses indicated a strong degree of overlap in current Northern Tourism product sectors and consensus on many of the growth sectors. Current shared product sectors include: Outdoor Adventure – hard/extreme adventure tourism and ‘soft’ adventure tourism; Experiential; Sport Hunting and Fishing; Touring; and, Aboriginal/cultural tourism. Outdoor, activity based products dominate the current sectors and there is a breadth of product for summer as well as winter tourism.

Markets and Segments

There is no common approach to the identification of visitor markets and/or segments across the jurisdictions. Many of the visitor market descriptions are based on activity participation: adventure, sport hunting, fishing, touring, aurora, business, meetings and conventions, aboriginal/cultural tourism. NWT, Northern Ontario and the Government of Canada include visitor audience segmentation based on related research typologies/tourist characteristics and are comparable. Other jurisdictions have

research- based visitor segmentation which isn’t directly comparable such as Yukon – Adventure Challengers, Cultural Explorers, Scenic Outdoor Travelers. There is no common approach to visitor characteristics / priority audience identification on which to base pan Northern marketing efforts.

Where geographic origin is reported, the near/regional markets are identified as high volume. The more distant/long haul markets (North America, Europe and Asia/Pacific) are identified as lower in volume/higher in margin/yield. Central and South America, Australia and Korea are listed as growth markets.

Region	Market Segments	Growth Sectors
Yukon	Adventure Challengers, Scenic Outdoor Travelers, Cultural Explorers, Traditional Value Travelers 3 Geographic: North America (Canada, US, Mexico), Overseas (Europe, Asia-Pacific)	Visitor type: Fully Independent Travel (FIT) Visitor experience: Experiential, Adventure, Fly Drive, Cruise-Tour
Northwest Territories	General Awareness, Sport Hunting, Sport Fishing, Aurora, Outdoor Adventure, General Touring, Business, Visiting Friends and Relatives Visitors: Active Escapists, Outdoor Enthusiasts	General Touring, Guided Outdoor Adventure (hard adventure and 'soft adventure'), Cruising, Business, European, Japanese, South Korean, Mexican, Australian
Nunavut	Adventure Tourism, Cultural Tourism, Consumptive Tourism, Accommodations and Business Travel, Sport Hunting and Fishing	Cruise, Adventure, Educational and Learning, Cultural, Sport Hunting and Fishing
British Columbia	Outdoor Adventure, Touring, Fishing, Golf, Festivals and Events, Aboriginal, Meetings and Incentive Travel	Aboriginal, Touring Investment priorities: Touring, Outdoor Adventure, Fishing, Festivals and Events
Alberta	Tourist characteristics: Savour the City, Peace and Tranquility, Adventures Await, Family Fun Geography: Near/regional markets (AB, BC, SK), Activity: touring, golfing, hunting and fishing, heritage, birding, meetings and conventions	Aboriginal Tourism, Heritage and Learning (includes resource extraction/ oil sands), Ethnic-Cultural, Golfing, Sport fishing, Birding, Business/Industrial companies, seasonal resource workers and new resident tourism
Saskatchewan	Recreation, Adventure, History and Culture, Attractions, Events, Services, Accommodations	Authentic Culture and Crafts, Adventure and "Experience" Tourism (quading, canoeing, kayaking, snowmobiling), "Soft" Adventure Tourism (cross-country skiing, tobogganing, ice-skating), and expanding product lines of existing businesses

Region	Market Segments	Growth Sectors
Manitoba	Geography: high volume (MB, ON, SK, AB, N Dakota, Minnesota) and high yield (long haul USA, Germany, UK) Experiential: Fishing and hunting, leisure/touring, adventure travel, culture and heritage, meetings, conventions and events	Outdoor and Aboriginal tourism, Churchill, wilderness lodges, parks Investment Priorities: Churchill, wilderness lodges, Star Attraction program, Grand Rapids, East Side of Lake Winnipeg and Northwest Manitoba.
Ontario	Hard/Extreme Adventure, Soft Adventure, Touring, Family Vacation, Aboriginal Tourism, Experiential Tourism	Nature and Outdoors, Angling, Hunting, Aboriginal Experience, ATV Riding, Great Lakes Cruises, Georgian Bay, Events and Festivals, Science North
Québec	Northern Tourism, Polar Tourism	Ecotourism, Cruise, Adventure Tourism, Educational and Learning, Cultural, Sport Hunting and Fishing
Newfoundland and Labrador	Labrador Tourism, Eco-tourism, Cultural Tourism, Winter Tourism, Adventure Tourism	Cultural Tourism, Non-Consumptive Tourism, Winter Tourism, Cruising, Outfitting (prior to legislative changes)
Government of Canada	No-hassle traveler, free spirit, cultural history buff, gentle explorer, virtual traveler, cultural explorer, authentic experiences, rejuvenator, personal history explorer	Northern Tourism, Aboriginal Tourism, Sustainable Tourism

4.3 Best Practices

Marketing best practices cited by respondents often reflected partnerships with other levels of government or with industry, to build capacity or leverage marketing resources. There is a healthy diversity of marketing practices being undertaken to foster and develop tourism. Examples include: The Northern Ontario Tourism Marketing Partnership -a government/industry marketing collaboration; 'Look Up North' regional marketing campaign supporting Yukon, Northwest Territories and Nunavut; collaborative training in Saskatchewan; and, the Deh Cho Travel Connection, a regional fly/drive marketing by Alberta, British Columbia and the Northwest Territories.

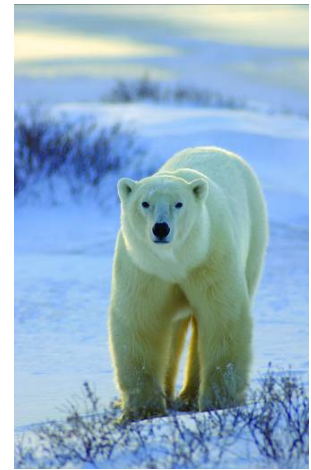
Best practices that address marketing challenges include:

- Yukon airport infrastructure development enabling long haul/intercontinental air charters
- Environmental best practices initiatives in British Columbia
- Nunavut community beautification

- Off season product development and marketing in Tofino, British Columbia with the 'storm watching'
- season now filling the previously under capacity/off season winter season.



5



Region	Marketing Practice Examples	Measures of Success
Yukon	Canadian River Expeditions/Nahanni River Adventures: Nahanni.com travel website is an example of how small, northern operators can leverage technology and new media to compete globally. Yukon Quest Great River Journeys (GRJ) Uncommon Journey Ltd.	Nahanni.com “Best of Show” for all of Canada in CTC 2007 e-tourism awards show. Winner, ‘Yahoo! Big Idea chair’ award. Long haul air charter tourism access is now well developed and private sector driven; Yukon is competitive with Alaska in air access for tourism.
NWT	Look Up North Campaign (partnership, media and trade program) Aurora tourism Rock/Ice Ultra: Adventure racing in March over ice and snow, attracting racers from all over the world to compete Town of Inuvik: marketing to the convention/meetings market, capitalizing on remoteness as an exotic destination Nahanni adventure tourism Norweta Cruise: Mackenzie River and Great Slave Lake East Arm cruises	‘Look Up North Campaign’: Recall and awareness of campaign (30-40%) Summer road traffic (20-30% increase following campaign) Website inquiries Toll-free tel requests for information Media conversion / effectiveness studies Trip diaries program
Nunavut	Look Up North Campaign (partnership, media and trade program) MOU with France to support francophone market development Bathurst Inlet Lodge eco tourism, Cruise North Expeditions (developing community training opportunities and program), ‘Trash Talking’ initiative (to clean-up/beautify communities)	Number of inquiries Number of website hits Visitor exit surveys Developing new Return on Investment (ROI) measures in 2008

Region	Marketing Practice Examples	Measures of Success
<p>British Columbia</p>	<p>Print: BC Outdoors Magazine, <u>The Milepost</u>, SnoRiders West Other campaigns in conjunction with other regional tourism stakeholders to leverage funding.</p> <p>Operational best practices to minimize environmental impacts: smaller size group tours; water travel at lower speed to reduce fuel consumption; using sails whenever possible; hiring local guides to reduce transportation to remote areas; using marine friendly and biodegradable paper products; on board water saving switches; marine friendly cleaning material; and annual carbon footprint reduction goals.</p> <p>Haida on the Queen Charlotte Islands green initiatives: HVAC /geothermal system to reduction fossil fuel consumption; green roof to minimize displaced water. Educational exhibits on climate change depicting the dramatic increase in sea levels and its impact on the landscape, archeological sites, ecosystems and animal population.</p> <p>'Storm watching' tourist product December - April in Tofino/ west coast of Vancouver Island: example of building off season (bad weather) tourism and potentially of climate change tourism (storms are potentially more frequent as a result of climate change).</p> <p>The Resort Municipality of Whistler has established itself as a centre for four-season recreation as snow pack and the snow season may become less as a result of climate change.</p> <p>Aboriginal/cultural tourism: Squamish Lil'Wat Cultural Centre in Whistler; Haida Museum and Community Centre, Skidegate, Haida Gwaii; Ksan Historical Village.</p>	<p>Web traffic, phone inquiries, email inquiries, fulfillment requests, contest entrants, audience reached</p>

Region	Marketing Practice Examples	Measures of Success
Alberta	<p>Deh Cho Travel Connection: regional 'fly/drive' destination marketing partnership involving three jurisdictions (Alberta, BC and the NWT) pooling resources to promote the 2,000 kilometer scenic touring loop with targeted marketing activities to international and domestic touring markets; maintains materials in English, French and German and undertakes special promotions, such as the Diamonds in the Rough campaign with a prize of a one carat diamond mined in the NWT</p> <p>The Boreal Centre for Bird Conservation on Lesser Slave Lake: an outstanding research and education centre complete with a hostel for researchers, volunteers or eco-tourists; attracts visitors interested in the boreal forest and birds, and those interested in the architecture and green features of the building, which is an outstanding example of energy-efficient construction</p>	<p>Operator sales/tourism expenditures Room/campsite nights booked Number of inquiries/website hits Number of partners/operators Marketing dollars leveraged</p>
Saskatchewan	<p>Print: Annual northern tourism visitor guide, materials produced by Tourism Saskatchewan (province-wide) and Northern Saskatchewan Tourism (to market northern Saskatchewan)</p> <p>Tradeshows</p> <p>Websites: Tourism Saskatchewan and Northern Saskatchewan Tourism</p> <p>Campaigns: Northern tourism visitor's guide used in four market-area campaigns (Saskatchewan resident campaign, Alberta resident campaign, U.S. resident campaign, growth and support campaign for former residents)</p> <p>Training programs delivered by Saskatchewan Tourism Education Council (Ready to Work, Service programs, Train the Trainer etc.)</p> <p>Collaborative (Industry-government) training programs for Northern residents</p> <p>Industry-government partnerships in planning Northern destination areas</p>	<p>Number of member partnerships Number of contacts and inquiries Number of visitors Point of origin of visitors Amount of dollars spent</p>

Region	Marketing Practice Examples	Measures of Success
Manitoba	<p>Destination Churchill: community-initiated tourism development strategy Travel Manitoba: assisted with Destination Churchill in development of 3-year strategy</p> <p>Spirit Way Inc: partner with Travel Manitoba for wolf-themed travel</p> <p>Media Relations: hosted 216 travel media</p> <p>Hosted Packaging Forums to develop Culture and Heritage and Adventure Travel & Ecotourism (ATE) products;</p>	<p>Designated lead for Churchill strategy \$26,000 in total from local operators to support marketing</p> <p>Media relations: leveraged \$7.7 in equivalent ad value New packages established and promoted in tourism campaign; may consider a packaging forum to bring together tourism operators in the North</p>
Ontario	<p>Northern Ontario Tourism Marketing Partnership (15% of provincial marketing budget) Local district marketing organizations: trade shows, sport shows Embarking on 5-year Northern Ontario tourism marketing strategy: customer focus, strategic partnerships, internet portal, one voice for Northern Ontario Pan-Northern Ontario Campaign: canadagreatoutdoors.com Science North (Sudbury): Diversifying product offering from an interactive science/nature education centre to include IMAX film development and production, traveling exhibits and an underground mine tour (Dynamic Earth) Fort William Historic Park: Engaging local aboriginal culture in its product offering Sault Ste. Marie/Algoma: Destination Marketing Fee (DMF) applied to hotel stays in Ontario; Sault Ste Marie and Kenora presently apply the fee; Other Northern Ontario cities will likely initiate in the future.</p>	<p>Not available</p> <p>DMF Introduced January 1, 2005. 20 properties currently participate, \$640,000 revenue generated in 2006 (year 2)</p>
Québec	<p>Press tours to promote hunting and fishing trips Cruise North cruises to the Canadian Arctic (Nunavik, Québec)</p>	<p>Number of phone calls received by outfitter and number of trips sold</p>

Region	Marketing Practice Examples	Measures of Success
Newfoundland and Labrador	SnoBreak, Snow Blast, Winter Odyssey, Cain's Quest (extreme winter adventure, Canada's longest endurance snowmobile race) Access North-Labrador 2002: dedicated provincial marketing campaign Provincial website	Increase in number of visitors to the region Number of active operators
Government of Canada	<p>Look Up North Campaign: business and marketing plan among Yukon, NWT, Nunavut, \$3 million federal contribution plus \$2 million Yukon contribution plus several in-kind contributions; 12 month campaign leading up to 2007 Canada Winter Games, involving television, magazine, mail/e-mail online advertising, shared web site and portal, special events. Early discussions are taking place to explore opportunities for a second campaign.</p> <p>Canadian Tourism Commission campaigns (Japan-awareness of aurora, Australia-broadcasting from Yukon, Germany-Canada whale night)</p> <p>Best Practice observed in other jurisdictions: Atlantic Canada Tourism Partnership, a nine-member, pan-Atlantic partnership including the Atlantic Canada Opportunities Agency, the four provincial tourism industry associations, and the Atlantic provincial governments; established to promote the entire Atlantic region as a tourism destination in targeted markets; could be an appropriate model to raise awareness of Canada's North as a potential tourism destination, domestically and abroad</p>	<p>Market research study on Look Up North concluded that the campaign raised awareness of the territories, increased the attractiveness of Northern tourism, and reduced perceptual and knowledge barriers.</p> <p>Positive results also observed for targeted CTC campaigns involving the North. Web site hits.</p> <p>Look Up North marketing campaign also demonstrated that territorial governments and industry associations can partner to successfully promote the North as a tourism destination.</p>



4.4 Research and Planning

Research is critical to tourism development. While the North has a lot to offer, no tourism product is unique; visitors can also see the Northern Lights in Alaska, Sweden and Northern Russia. Market demographics are also changing, and as it does, demand is shifting to other products. However, research and marketing is very expensive, while overall visitation is relatively small compared to national numbers. We could develop superior products by cooperating and sharing information. This could start with an outline of surveys and methodology, as well as the development of “research dictionary”. The “Research Dictionary” could outline the various types of surveys, their cost and benefit, as well as defining variables.

Region	Research and Planning Tools or Activities
Yukon	Department of Tourism and Culture tracks annual visitation, conducts Visitor Exit Surveys every five years Tracking of figures from Yukon Business Survey, Wilderness Tourism Licensing Act, Whitehorse International Airport, visitations at attractions, museums, and information centres
Northwest Territories	Works closely with NWT Tourism, CTC and other partners to provide relevant and timely research Responds to industry demand by focusing on key areas of interest Completes major tourism exit surveys every five years. Some of these surveys are even completed in Japanese. Works closely with the industry association, monitoring inquiries and market responses. Some indicators, including hotel occupancy, are collected from industry associations.
Nunavut	Visitor exit surveys (first in 2006, next in 2008) Tourism included in economic and business statistical analysis conducted by Nunavut and Federal governments Nunavut Tourism business plan for 2008/09 places greater importance on research and data collections.

Region	Research and Planning Tools or Activities
British Columbia	Tourism British Columbia works to build knowledge, foster insight and share information on tourism in northern British Columbia for Tourism British Columbia, the Northern BC Tourism Association, the tourism industry and all stakeholders; To accomplish this, Research and Planning monitors the performance of the tourism industry and conducts research and analysis to support all planning needs.
Alberta	Government grants to conduct feasibility studies Partnerships with the CTC on market potential studies in the US or overseas markets Partnerships with other provinces and territories, for example, with Tourism BC and CTC on Alaska Highway travelers. Research to support product development, for example an assessment of northeast Alberta Aboriginal product.
Saskatchewan	Tourism Saskatchewan (industry-government partnership) has Research Manager who collects data, distributes, analyzes, and disseminates information Research and training strategies delivered to industry through workshops.
Manitoba	Travel Manitoba's Market Intelligence and Research Division, provides monthly and/or quarterly reports and various research studies to measure effectiveness.
Ontario	Extensive use of web to provide research reports and studies. Monthly tourism performance research reports provided to key stakeholders. Provide information on many government programs and services to regional organizations.
Québec	Ministère du Tourisme: funding for regional tourism associations, Development Advisor to monitor issues in Nord-du-Québec region, and Coordinator to serve as product manager for Aboriginal tourism.
Newfoundland and Labrador	Representation on Management Committee for Destination Labrador. Attendance at meetings by invitation.
Government of Canada	The Canadian Tourism Commission works with Statistics Canada and other partners to produce tourism reports and summary publications, and to conduct travel surveys and tourism studies on Canadian and international travel.

4.5 Challenges and Partnerships

Key challenges cited by respondents include: inadequate infrastructure, lack of market-ready products, distance/access, and labour shortages. Several types of partnerships have been formed to address these challenges.



Region	Challenges	Partnerships (public/private sector)	Partnerships (Aboriginal)
Yukon	Development of tourism product and destination areas, quality of physical tourism assets, quality of service and hospitality, public infrastructure improvement, access to capital for small and medium-sized enterprises, labour shortages	Established collaborations between territorial, municipal and First Nations Governments and partnerships with non-governmental organizations and the private sector (e.g. Tourism Cooperative Marketing Fund) Private sector investment leveraged through cooperative marketing initiatives ('pay to play')	Department of Tourism and Culture provides financial assistance to Yukon First Nations Tourism Association for operations and marketing; Developing a Yukon First Nations Tourism Strategy and associated business support program (\$450k through Northern Strategy); A number of First Nations led tourism businesses are market-ready (e.g. Great River Journey); Many First Nations Development Corporations investing in Yukon tourism
Northwest Territories	Infrastructure, labour, lack of skilled workers, access to capital, cost of travel/fuel, extensive consultation process, low internet presence, lack of package tour options	Tourism 2010 Plan: committed funding for five years for tourism development of marketing, product development, infrastructure, human resources, research and planning Tourism Product Diversification and Marketing Program: significant funding for tourism operators to diversify or expand product offerings Cooperative advertising with tourism industry and operator-hosted familiarization tours for media professionals	NWT Tourism includes six Aboriginal-appointed members on its fourteen member Board

Region	Challenges	Partnerships (public/private sector)	Partnerships (Aboriginal)
Nunavut	Infrastructure (ports, refueling), product development, short season, cost of labour/travel/goods, shortage of skilled labour, lack of tourism businesses	Partnerships with Federal Government Focusing on sector-targeted markets, high-yield businesses (e.g. accommodations, specialized tourism, cruise industry) Nunavut-France MOU facilitates business partnership formation and investment attraction	Capacity-building in communities Investment partnerships to support transfer of expertise and technology Training programs
British Columbia	Infrastructure, market-ready tourism product, skilled labour, education	Work with government agencies at all levels Leverage marketing with regional partners	Haida Heritage Centre, Ksan Historical Village, Kitselas Canyon Development, Museum of Northern BC
Alberta	Distance, infrastructure to support facility development, land use competition (forestry, oil, gas), accommodation, labour, operator capacity, lack of destination awareness	Work with municipalities and natural resource industries to identify land for tourism Temporary Foreign Worker Program to address labour issues Tourism Investment Symposium (provincial government), although limited investment-ready opportunities available Improved communication between province and tourism operators / municipalities Cooperative marketing with industry Iron Horse Trail: 300 kilometer continuous multi-use recreation corridor running through northeast Alberta that is owned and managed by a not-for-profit entity, North East Muni-Corr Ltd (provincial model of success	Aboriginal Tourism Advisory Council, government grants specifically for aboriginal tourism development, Travel Alberta initiatives to build capacity and awareness for Aboriginal Tourism

Region	Challenges	Partnerships (public/private sector)	Partnerships (Aboriginal)
		for municipal cooperation) Deh Cho Connection – partnership of Provincial/Territorial/Municipal/Regional /Tourism Associations	
Saskatchewan	Infrastructure (roads, parks, communications), labour shortages, limited available skills, minimal certification standards, minimal community capacity, policy restrictions, limited awareness of northern tourism products, limited financing: funding from Canadian Tourism Commission requires leveraged dollars, criteria for provincial marketing dollars may not fit all regions equally	Tourism Saskatchewan, an industry-government partnership, works with five tourism regions in Saskatchewan. Each of the tourism regions partners with industry in their region. Collaborative training programs for northern residents Corporate sponsors in marketing by Northern Saskatchewan Tourism	Aboriginal Tourism Association-produced tourism guide, Aboriginal membership in Northern Region and Tourism Saskatchewan for cooperative advertising, discounts, etc.
Manitoba	Access, product and service gaps, technology adaptation, destination awareness, climate change, competition, environmental impact	Creative and effective destination web marketing Leverage of globally-recognized brands (e.g. Churchill) Partnership with other northern destinations, positioning as a cohesive destination In the past: cost-sharing agreements	Product expansion and enhancement through development of four northern Aboriginal clusters for development: Churchill, Grand Rapids, Northwest Manitoba and East side Lake Winnipeg.

Region	Challenges	Partnerships (public/private sector)	Partnerships (Aboriginal)
	of tourism on tundra	to provide seed money through forgivable loans to leverage private sector dollars	
Ontario	Distance, access to capital, cost of waterfront, infrastructure, regulatory concerns, lack of investment-ready products, lack of strategic planning, tightening of US border, decline of travel from US	<p>Joint industry-government working group to address issues</p> <p>Building more effective relationships between tourism and forestry industries (e.g. Resource Stewardship Agreement)</p> <p>Land use planning for more strategic consideration of tourism</p> <p>Facilitate Ontario-US travel through Western Hemisphere Travel Initiative</p> <p>Northern Ontario Heritage Fund provides up to 50% of capital and installation costs for alternative energy in the Far North</p> <p>Ontario Tourism Marketing Partnership Corp. works with operators and industry to leverage marketing resources</p>	Provincial and federal assistance for Aboriginal Tourism Associations and Economic Development initiatives, hosting and promotion of annual Aboriginal events
Québec	Distance, transportation costs, lack of qualified labour, few tourism products	<p>Assuming responsibility at local and regional levels for training and development of new products</p> <p>Ministère du Tourisme actively developing "north-south" links between businesses</p>	<p>Workforce training pilot project by Kativik Regional Government</p> <p>Partnerships between adventure and eco-tourism (Link between South of the province and Aboriginal communities in the North)</p>
Newfoundland and Labrador	Product development, access, infrastructure (transportation, info	Destination Labrador undertaking product development Department of Tourism, Culture and	Limited provincial initiatives

Region	Challenges	Partnerships (public/private sector)	Partnerships (Aboriginal)
	centres, lookout sites), customer service, lack of dedicated provincial marketing campaign for Labrador	Recreation working on product development and infrastructure Interest groups lobbying for enhanced access through airlines, ferries Department of Innovation, Trade and Rural Development funds many tourism initiatives requiring private sector investment	
Government of Canada	Product development, strategic marketing matched with service capacity, transport infrastructure Standardized labeling of tourism sectors	INAC's Strategic Investments in Northern Economic Development (SINED) programs provide contribution funding to the territories, a portion of which targets the tourism sector in each territory. INAC seeks leveraging from project proponents and other stakeholders, including territorial and Aboriginal governments, not-for-profit organizations, and private sector entities Infrastructure Canada's Public Private Partnership Fund, to be administered by PPP Canada Inc., will invest in public private partnerships using a set of financial instruments to support private sector participation in public infrastructure projects	Great River Journey (GRJ): With the support of the territorial and federal governments, GRJ is a partnership between four First Nations and the operator to develop a wilderness safari on Yukon River targeting global high end travelers

4.6 Training and Capacity Building

There was strong consensus among respondents regarding workforce related challenges: labour shortages overall compound the difficulties faced by the tourism sector in attracting, training and retaining skilled labour. The scarcity of trained workers was linked to:

- Access to training, particularly in remote communities and cost of accreditation/training
- Structural issues in attracting and retaining staff in seasonal, low wage employment - including availability of more attractive employment options, limited employment benefits (health, wellness, child

care), and availability of affordable staff housing in remote locations

- Difficulty building quality/service standards

Key strategies to address training and capacity building include: targeted human resource programs and activities for the tourism industry; links with post secondary institutions to develop tourism curricula and training; government partnerships with Aboriginal Peoples; community based outreach; and certification to build quality standards.

Region	Challenges	Strategies for Training and Capacity Building
Yukon	Lack of qualified skilled workers, retaining young workers, service standards	Yukon Government Department of Education recently adopted Labour Market Framework outlining strategies to support labour market development Yukon Tourism Education Council provides training for individuals Yukon Tourism Training Fund supports individuals and businesses
NWT	Lack of skilled workers, staff turnover, seasonal employment	Tourism 2010 Plan: \$100,000 annually to tourism training (e.g. customer service workshops, product packaging workshops) NWT Government, through Aurora College, offers courses for the public / tourism industry (e.g. bookkeeping, marketing, etc.)
Nunavut	Lack of skilled workers, lack of training facilities, availability of other more attractive employment options, seasonal nature of tourism	Nunavut Tourism has identified specific training needs (e.g. Cruise Ship, Customer Service) Government of Nunavut works with Nunavut Tourism to identify human resources capacity issues Government of Nunavut in discussions with Federal Government to address human resources development Investment Partnership Strategy includes expertise transfer to address capacity issues
British Columbia	Attracting and retaining skilled labour	Continue to work with go2HR.ca tourism website and post-secondary institutions on program offerings in tourism
Alberta	Labour shortage across the province, particularly in North (wage competition with resource industry) Limited tourism expertise, awareness and resources of northern operators	Provincial Workforce Strategy for tourism and hospitality industry (within its broader labour strategy: "Building and Educating Tomorrow's Workforce") with industry taking lead responsibility for implementation Certification and training through Alberta Hotel and Lodging Association Two major tourism conferences every year, and Travel Alberta workshops and information sessions Aboriginal interpreter program at Lakeland College (discontinued due to lack of registrations)

Region	Challenges	Strategies for Training and Capacity Building
Saskatchewan	<p>Saskatchewan in the midst of labour shortage, difficult to fill lower paying entry-level tourism positions</p> <p>Limited financial resources to support staff retention, motivation, and to deliver skills training programs</p> <p>Limited available skills</p> <p>Health and wellness issues</p> <p>Limited availability of day care staff</p> <p>Travel distances and limited means of transportation for staff</p> <p>Limited accommodations or housing available in northern communities for staff</p>	<p>National occupation-specific certification process delivered by Saskatchewan Tourism Education Council</p> <p>Training programs delivered by Saskatchewan Tourism Education Council (“Ready to Work”, Service Programs, Train the Trainer, etc.)</p> <p>Training programs delivered by colleges</p> <p>Industry-based training programs delivered by Saskatchewan Tourism Education Council, Saskatchewan Outfitters Association, Hotel Association, etc.</p> <p>Workshop delivery by Northern Saskatchewan Tourism, with the support of the Ministry of First Nations and Métis Nations – Northern Affairs Division</p> <p>Tourism Community Champion Program, delivery by Northern Saskatchewan Tourism and Tourism Saskatchewan, identifies individuals in communities to champion tourism, individuals then form a network across the province</p> <p>Maintain contact with students to help them move forward in their career (e.g. certification)</p> <p>Deliver in-house professional development opportunities to enable individuals to perform their job well, and to prepare them for other positions</p> <p>Develop reward / recognition programs, offer competitive wages</p> <p>“Dollar an hour” bonus structure for hours served (ability to “bank” an additional \$1 per hour, paid when employee completes employment)</p>
Manitoba	<p>Lack of skilled workers, limited access to training in remote locations</p>	<p>Long-term Aboriginal tourism training program under development in cooperation with tourism training partners (e.g. Manitoba Tourism Education Council (MTEC) training for Pow Wow visitor services staff)</p> <p>MTEC works with other western provincial tourism education councils to provide human resource solutions</p>
Ontario	<p>Retaining employees in seasonal businesses, limited awareness of tourism as a career, access to training in remote communities, increased competition from staff training provided by resource-based tourism industries</p>	<p>Tourism-related training available through Ontario Tourism Education Corp. (OTEC), as well as certification programs</p> <p>Post-secondary tourism programs available through community colleges in Northern Ontario</p> <p>Ministry of Tourism works with community colleges and OTEC to encourage development of targeted Human Resources curriculum</p>

Region	Challenges	Strategies for Training and Capacity Building
Québec	Labour shortage	<p>Tourism Policy of Québec, an industry-government partnership: Expected results include increased supply of trained staff</p> <p>Training and planning for human resources responsibility of regional organizations (including Cree and Inuit)</p> <p>Ministry of Tourism using industry-recognized quality standards (e.g. training program for snowmobile guides)</p>
Newfoundland and Labrador	Labour shortage, low wages, seasonal hours, lack of access to training	<p>Hospitality Newfoundland and Labrador (tourism industry association)</p> <p>Familiarization tours</p> <p>Provincially-supported economic development board, industry association, and tourist information centres</p>
Government of Canada	Not applicable	<p>Canadian Tourism Human Resource Council (CTHRC): industry engagement</p> <ul style="list-style-type: none"> • Emerit program (www.emerit.ca) • Discover Tourism (www.discovertourism.ca) • Ready to Work • Canadian Academy of Travel and Tourism <p>Parks Canada Agency: internships, Aboriginal staffing</p> <p>Parks Canada (Northern Field Units) – research to help build reception capacity via community based eco-tourism and cultural tourism.</p> <p>Temporary Foreign Worker Program: to meet short or long term needs</p>

4.7 Analysis of Strengths, Weaknesses, Opportunities and Threats

Northern Canada has significant tourism assets - UNESCO World Heritage Sites, world scale attractions and experiences.

The analysis of the Strengths, Weaknesses, Opportunities and Threats (SWOT) identifies issues in key areas: access, product and market development, destinations, marketing, training and community readiness and aboriginal community engagement.

Key opportunities include: infrastructure to enable improved access; sustainable experiential tourism product; northern tourism awareness to capitalize on the growing world interest in the North and its peoples; coordinated image management; environmental practices; workforce and community readiness, and aboriginal community engagement.



Summary of Strengths, Weaknesses, Opportunities and Threats cited by survey respondents (in aggregate).

Strengths	Weaknesses	Opportunities	Threats
<p>Products: abundant fishing and hunting, niche offerings, demand for saleable products, many experienced, reputable operators, multiple lakes and waterways, extensive provincial parks, climate change (extended access)</p> <p>Existing tourism governance and industry participation</p>	<p>Products: dominant focus on hunting/fishing, lack of signature festivals / events, products not market-ready / export-ready, demand for Aboriginal products exceeds supply, too many part-time tour operators, lack of travel packages, lack of convention / meeting facilities, limited range of accommodations, wide range of “business-readiness” among communities</p> <p>Inconsistent regulatory approaches (e.g. allocation of crown land to industry)</p>	<p>Product Growth Sectors: Aboriginal tourism, business travelers, adventure tourism, cultural tourism, non-consumptive tourism, eco-tourism, educational tourism, Northern Lights tourism, fly fishing and ocean/salt water fishing demand, demand for “untouched” areas, development of themed products’ suites of activities’ (winter, water, high-end luxury), development of distinct brand(s)</p>	<p>Products: climate change, declining wildlife populations, regulatory restrictions on hunting/fishing - hunting restriction on Polar Bear and Caribou, public opposition to some hunting</p> <p>Changing markets and demographics (e.g. older clients, shorter vacations, amenities expectations), declining overall participation in fishing and declining economic profile of traditional lake fishing audiences</p>
<p>Access: good air, road and water access in some locations, American road travel to Alaska requires passage through Alberta, BC and Yukon</p>	<p>Access: Inconsistent level of access infrastructure, mixed/ overall ‘poor’ international air accessibility, inconsistent, expensive local connections to tourism destination/ product</p> <p>Lack of good roads and ports, distances between attractions, roads not RV/luxury automobile friendly, lack of rest stops and signage</p>	<p>Access: ability to service long-haul direct flights from overseas markets, potential for year-round tourism, proximity to Northwest Passage and Alaska’s cruise industry, growing use of high-end recreational vehicles</p>	<p>Access: passport and border issues, Western Hemisphere Travel Initiative, ongoing road construction and poor road conditions, lack of broadband network access, potential development issues on traditional lands</p> <p>Cost: Rising fuel prices</p>
<p>Profile destinations: including Haida Gwaii and Gwaii Haanas, Kluane, Dawson City, Nahanni, Thelon, Tuktoyuktuk, Churchill, Pisew Falls – Kwasitchevan Falls, Wood Buffalo, Prince Albert, Algonquin</p>	<p>Reliance on Profile Attractions: Growth of visitor preference for ‘experiential travel’ over ‘destination travel’</p> <p>Awareness of other destinations and attractions.</p> <p>Limited Capital to develop other potential</p>	<p>Build on Global Profile:</p> <p>Build experiential travel links.</p> <p>Develop product and audience awareness for broader range of destinations and attractions</p> <p>Maintain strengths in face of</p>	<p>Global competitors marketing, experiential tourism products in remote, (wilderness) locations (World Tourism Organization (WTO) Barometer reports 2007)</p> <p>Cost: rising cost of fuel, value of Canadian dollar, insurance costs for businesses, increasing labour</p>

Strengths	Weaknesses	Opportunities	Threats
Aurora viewing	destinations: limited investment available, dependency on government, small marketing budgets, value of Canadian dollar	competitive effort (Aurora/Fairbanks Alaska) Access to Capital: increased government tourism funding, partnering among Northern tourism groups to leverage dollars	costs, global economic challenges (e.g. energy, food costs)
<p>Global Profile/ Image: Remote, pristine wilderness</p> <p>Fresh, clean, air and water</p> <p>Dramatic natural wonders.</p>	<p>Marketing: lack of a unified northern brand and awareness,</p> <p>Limited funds: province-wide marketing dilution, small marketing budgets, lack of cooperative marketing between sectors,</p> <p>Visitors are changing and visitor expectations are escalating: clientele more experienced travelers,</p> <p>Tourism association membership costs</p>	<p>Marketing:</p> <p>Global awareness of the North is rising, Inuit culture is unique worldwide, global marketing opportunities (e.g. 2008 Olympic Games in Beijing, multi-language websites), 2010 Olympic Games in Vancouver,</p> <p>High-end niche product marketing, online marketing, coverage in international travel magazines, filming and photo travel, “getaway marketing” with airport authorities and regional airlines, travel packages, four-season marketing</p>	<p>Higher profile, alternatives: Northern/remote, ‘off the beaten path’ tourism is intensely competitive: international competition, national competition, competition within the provinces, lack of outward focus to competitive regions</p> <p>‘Green’ Environmental practices are limited (fossil fuel dependency)</p> <p>‘Pristine wilderness experience’ for visitors compromised (e.g. - trash in communities)</p>
<p>Training and Education: Diverse training and certification programs in all jurisdictions</p>	<p>Training and Education: lack of skilled workers, lack of training opportunities for operators, low paying jobs insufficient as careers</p>	<p>Training and Education: Increase uptake of existing programs and industry standards (e.g. CTHRC)</p>	<p>Training and Education: lack of trained personnel and certification of staff; variable quality visitor experience</p>
<p>Aboriginal Communities: authentic Aboriginal art, craft and culture (Esp. awareness of Inuit and Pacific Northwest) heritage, history, community events</p>	<p>Aboriginal community readiness and engagement: scarcity of aboriginal culture market ready experiences or ‘products’; tourism work force participation; marketing and merchandising of aboriginal arts and craft</p>	<p>Partnerships and program development with aboriginal communities: establish aboriginal cultural centers and opportunities to share culture; reinforce traditional knowledge and importance of elders.</p>	<p>Aboriginal culture: loss of aboriginal culture as a visitor experience; reduced visibility of aboriginal culture; decline of traditional knowledge and culture; decline in market for art and crafts</p>

5 Summary of Best Practices

In addition to addressing the survey questions, jurisdictions were asked for examples of northern tourism Best Practices, to support information sharing and provide context for discussion at the 2008 Forum. Their submissions represent the creative and innovative initiatives being undertaken to address the challenges identified in the SWOT.

This section summarizes best practices corresponding to these challenges.



Key Challenges	Best Practices
Aboriginal Culture	Manitoba Packaging Forums to develop Culture and Heritage and ATE products; NWT regional and sector product development workshops
Access	Charter Airline Access: Yukon developed air access infrastructure (extended landing strip etc.) to enable long haul charter landings and partnered with Condor, a major international/European charter group to build charter tourism traffic.
Costs	<p>Northern Ontario Heritage Fund provides up to 50% of capital and installation costs for alternative energy in the Far North.</p> <p>Operational best practices (BC): water travel at lower speed to reduce fuel consumption; using sails whenever possible; hiring local guides to reduce transportation to remote areas</p>
Environmental Practices	<p>Nunavut: 'Trash Talking' initiative to clean-up/beautify communities.</p> <p>Haida on the Queen Charlotte Islands (BC) green initiatives: Heating, Ventilation, Air Conditioning (HVAC) /geothermal system to reduce fossil fuel consumption.</p> <p>Operational best practices (BC) to minimize environmental impacts: smaller size group tours; using marine friendly and biodegradable paper products; on board water saving switches; marine friendly cleaning material; annual carbon footprint reduction goals.</p>

<p>Marketing</p>	<p>Aboriginal arts and crafts (Four Hosts) and Inuit Inukshuk (Nunavut) on display at Beijing through Vancouver Organizing Committee for the 2010 Olympic and Paralympic Winter Games (VANOC).</p> <p>Regional marketing partnerships: 'Look Up North' Yukon, NWT, Nunavut partnership; Northern Ontario Tourism Marketing Partnership; Deh Cho Travel Connection partnership between Alberta, BC and NWT.</p> <p>Website workshops at regional and sector tourism operator meetings through NWT Tourism Pan-Northern Ontario campaign: canadasgreatoutdoors.com Canadian River Expeditions/Nahanni River Adventures leverages new media and new technology to compete globally: Nahanni.com award winning web site, national Canada 'best in show'.</p> <p>CTC 'Explorer Quotient' is promising; Yukon and NWT research driven, visitor characteristics based on audience segmentation specific to Northern Tourism.</p>
<p>Global Competition</p>	<p>NWT: Tourism 2010 and the Tourism Product Diversification and Marketing Program both provide committed funds to assist operators to upgrade, diversify or expand product.</p> <p>Great River Journey (GRJ): With the support of the territorial and federal governments, GRJ is a partnership between four First Nations and the operator to develop a Yukon River wilderness safari targeting global high end travelers.</p> <p>Storm watching' tourist product December - April in Tofino/ west coast of Vancouver Island.</p>
<p>Training and Education</p>	<p>MTEC training for Pow Wow visitor services staff.</p>

	<p>Tourism Community Champion Program, delivery by Northern Saskatchewan Tourism and Tourism Saskatchewan, identifies individuals in communities to champion tourism, individuals then form a network across the province</p> <p>Cruise North Expeditions developing community training opportunities and program in Nunavik</p> <p>Ontario Tourism Education Corp.; Saskatchewan Tourism Education Council provides occupation specific certification; Alberta Hotel and Lodging Association provides certification and training</p> <p>Parks Canada Internships and Training on site</p>
<p>Products</p>	<p>Eco-tourism - Bathurst Inlet Lodge (Nunavut), the Boreal Centre for Bird Conservation on Lesser Slave Lake (Alberta) and polar bear watching (Churchill Manitoba)</p> <p>Experiential tourism – Aurora tourism (NWT)</p> <p>Adventure tourism (hard/extreme) – Yukon Quest, Rock and Ice Ultra (NWT), Cain's Quest (Labrador)</p> <p>Adventure tourism (soft) – Great River Journey (Yukon)</p> <p>Cruising – Norweta (NWT) and Cruise North Expeditions (Nunavut and Québec/Nunavik)</p> <p>Aboriginal/cultural tourism – Gwaii Haanas, Squamish Lil'Wat Cultural Centre, Ksan Historical Village (all BC), Fort William Historic Park (Ontario), Pow Wows (across Ontario and the Prairies).</p>

6 Conclusion and Recommended Actions

Conclusion

Canada's North is the home of spectacular tourism destinations and experiences that attract visitors from within Canada and around the world. Aboriginal tourism in particular is a growing northern attraction, and various partnerships are being created to develop and market world class products to compete globally. Northern jurisdictions have to respond to threats and challenges such as rising fuel costs, global competition and world focus on environmental stewardship. This report gives us ideas on what other Canadian northern jurisdictions are doing, and what more we could do.

Recommended Actions:

1. That each jurisdiction present the "Tourism Potential in Canada's North" report to their Minister of Tourism, and a copy be sent to the Canadian Tourism Commission.
2. Post the Report on the Northern Development Ministers Forum website (www.focusnorth.ca).

Appendix A: Survey

Developing the Tourism Potential of the North

Questionnaire

Jurisdiction: _____

Contact: _____

Northern Tourism Marketing:

What are the growth sectors in the northern tourism industry in your jurisdiction?
How does your northern jurisdiction segment the market? (e.g. northern tourism or Aboriginal tourism.)
What northern marketing campaigns have been successful and how does your jurisdiction define and measure success?

Are there specific tourism marketing campaigns for your northern jurisdiction? If so, what would be the comparison between dollars spent in the northern jurisdiction versus the entire province?

Northern Tourism Development:

What are the obstacles to tourism development in your northern jurisdiction? (e.g. infrastructure, labour, product, etc.)

What approaches have been successful in overcoming these obstacles?

How does your northern jurisdiction leverage private sector investment?

Partnership with Aboriginal Groups:

Can you identify Aboriginal tourism initiatives that capitalize on the tourism industry in your northern jurisdiction?

Human Resources:

What approaches are being used to train, certify and retain workers in the northern tourism industry?

How does your government work/engage with industry partners to develop human resources capacity in northern tourism?

What are human resource issues in the tourism industry within your northern jurisdiction?

Research and Planning:

How does your government partner with industry to provide relevant and timely information for northern tourism development?

Sector Overview:

What is the total number of tourists and spending for your jurisdiction?

What percentage of tourists visit, and what percentage of tourism dollars do they spend in your northern jurisdiction?

Funding:

What challenges does your jurisdiction face in obtaining funding for northern tourism, from within the jurisdiction or the Canadian Tourism Commission or other funding agencies?

Identify Strengths, Weaknesses, Opportunities and Threats:

Identify the above in the tourism industry within your northern jurisdiction.

Strengths	Weaknesses	Opportunities	Threats
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Please return completed questionnaire to Linda_ecklund@gov.nt.ca.

Thank you.

Appendix B: Acronyms

BDC	Business Development Bank of Canada
BDIC	Business Development and Investment Corporation
CTC	Canadian Tourism Commission
CTHRC	Canadian Tourism Human Resource Council
DMO	Destination Marketing Organization
DMF	Destination Marketing Fee
EQ	Explorer Quotient – CTC market segmentation
FIT	Fully Independent Travel
GRJ	Great River Journey
HVAC	Heating, Ventilation, Air Conditioning
INAC	Indian and Northern Affairs Canada
MOU	Memorandum of Understanding
MTEC	Manitoba Tourism Education Council
NADC	Northern Alberta Development Council
NDMF	Northern Development Ministers Forum

OTEC	Ontario Tourism Education Corporation
PPP Canada Inc	A crown corporation; federal government's Public Private Partnerships office
ROI	Return On Investment
SINED	Strategic investments in Northern Economic Development
TDR	Tourism Destination Region
VANOC	Vancouver Organizing Committee for the 2010 Olympic and Paralympic Winter Games
WTO	World Tourism Organization, a United Nations organization that publishes the 'Barometer' reporting on global tourism statistics, trends and best practices.