
Sustainable Arctic Tourism with the Nunavimmiut:

**A strategy for developing a niche of excellence
for sustainable, community-based outdoor and
cultural tourism in Nunavik (2010-2025)**

02/10/2010



Source: Nunavik Parks

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Foreword

- This Strategy document and the related Action Plan are confidential and are only distributed for discussion purposes to key regional development stakeholders (Federal, Provincial and Regional Government as well as key industry players)
- This document is meant to discuss a possible development strategy (2010 to 2025) and an Action Plan to support that strategy for the period from 2010 to 2015. This document's role is to stimulate discussion that will lead to consensus on a vision for development of Nunavik as a niche of excellence in sustainable community tourism development. It is neither exhaustive nor authoritative
- This Strategy and Action Plan have been developed in accordance with the principles and methodology of the ACCORD project (l'Action concertée de coopération régionale de développement) as well as the principles for sustainable, community-based tourism and is supported by the MDEIE
- The process of developing this plan was undertaken with initial consultations in 2007 and included more than 16 meetings of the Niche Committee. Given the collective and collaborative nature of economic development in Nunavik, the committee was composed of key regional government departments, regional organizations and representatives of the business community. The committee included representatives of the Kativik Regional Government (KRG) whose responsibilities include transport, parks, economic development and training. Makivik Corporation who is a key economic force in the region and who also is majority owners of Cruise North, First Air and Air Inuit was also represented. The Federation des Cooperatives du Nouveau Quebec (FCNQ) who operate 90 percent of the region's hotels and are actively involved in outfitting and outdoor tourism as well as operating a regional chain of department stores were also part of the committee. The Nunavik Tourism Association (NTA) which represents the majority of the regions active tourism operators were represented on the committee. Also taking an active role of the committee were the Avataq Cultural Institute, Air Inuit, the Ministère du Tourisme (MTO) and the Ministère du Développement économique, de l'Innovation et de l'Exportation MDEIE)
- Thank you to all the stakeholders both in Nunavik and in the South who contributed their time and expertise in the development of this plan

1- Overview

**Vision, Definitions, Objectives,
Benefits, Initiatives and Impacts**



Source: www.tourismequebec.com

1.1 Vision for Sustainable Outdoor and Cultural Tourism in Nunavik

Vision

To develop a sustainable, community-based outdoor and cultural tourism niche in Nunavik as a means of empowering local communities and responsibly managing the economic growth and development of the region in a way that respects and enhances the social, cultural, economic, and ecological well-being for Nunavimmiut.

Achieving the Vision

Nunavik is a small emerging destination in the global tourism market. It is a land of pristine water and natural wonders, abundant wildlife, wide open spaces, authentic indigenous culture, extreme arctic climate, diverse landscape, and an intriguing archaeological history. Together, this rare combination of attributes is increasingly difficult to find, and as such Nunavik is and will become an even more sought after destination for the experienced adventure traveler.

To achieve the vision of a sustainable tourism industry in Nunavik there has to be a sincere appreciation for the intrinsic value of these natural tourism assets and a clear understanding of the growing opportunity that they represent. Further, tourism industry stakeholders must work with Nunavimmiut to find the right balance between preserving and developing those assets for the long term benefit of local communities and individuals. Protecting and enhancing Nunavik's tourism resources is the key to maintaining a competitive advantage in the global market. With proper management and planning, the natural and cultural resources of Nunavimmiut will drive economic growth in the region for generations to come.

In the past five years Nunavik has seen a surge in interest from individuals and tour companies who are looking for a unique and authentic experience. With this increase in demand, local individuals and communities are beginning to see opportunities to create employment for themselves and improve their standard of living. As a largely undeveloped destination, herein lies the very unique and fragile opportunity for Nunavimmiut to place themselves in a position to responsibly manage (with the help of regional government and business) the growth of the tourism industry and ensure local economic benefit, while protecting natural resources and strengthening the integrity of their culture and communities.

At the center of this economic opportunity, the Kativik Regional Government and its partners is bringing together a skilled tourism development team with local and industry expertise. They will guide and develop the long-term infrastructure, policies, strategies, training plans, and other tools that will ensure the success of the ACCORD strategy and position local Nunavimmiut to maximize the positive impact of tourism development, and minimize the negative impact. With the coordinated effort and cooperation of private and public stakeholders during the planning and strategy-making process, realizing the shared vision of a sustainable tourism industry in Nunavik for the benefit of Nunavimmiut will be achieved.

1.2 What do we Mean by Sustainable Outdoor and Cultural Tourism?

Sustainable tourism is a concept that can generally be described as incorporating four fundamental characteristics, which in turn make up the guiding principals for Nunavik's ACCORD strategy:

1. Protect and enhance the natural, historical, cultural, and other resources on the industry depends
2. Plan and manage tourism development in a way that fosters long-term socioeconomic benefits for present and future generations while minimizing the negative impact
3. Benefit host communities and improve the quality of life for local people
4. Provide and maintain a high-quality visitor experience

The primary objective for developing a sustainable tourism industry in Nunavik is to benefit Nunavimmiut. Tourism has been identified as a major driver for future economic growth by regional stakeholders, as well as the governments of Québec and Canada. The development of a sustainable tourism industry is expected to have a number of positive effects, including community development, youth employment and cultural reinforcement.

Outdoor and Cultural Tourism

Sustainable tourism is most commonly associated with eco-tourism, nature-based tourism, outdoor tourism, cultural tourism, and other similar niche markets that cater to small groups of individuals and promote a respect for cultural and environmental responsibility. For the ACCORD strategy outdoor and cultural tourism does not include hunting and fishing. Interestingly, these sectors of the industry have also led and continue to lead much of the growth seen in global tourism over the past decade. As a result, development of outdoor and cultural tourism products in Nunavik is a key initiative identified in the Nunavik Tourism Trends and Opportunities Study (2007). This niche has been a major focus of tourism training and development in recent years and will be central to the ACCORD strategy.

Sustainability in all Things

It is important to note that sustainable tourism is not limited to these sub-sectors. Sustainable tourism principles can and should include other sectors such as accommodations, food service, the cruise ship industry and even sports hunting and fishing (not areas of focus for this plan). Whether for feature products or support services, sustainability is an important criterion for all elements of the ACCORD strategy.

1.3 Pursuing a Niche of Excellence Strategy

A Niche of Excellence is formed when a focused strategy and a concentration of expertise, experience and know-how in a certain specific field are combined to create competitive advantage. The result is innovation in that field that can overcome industry challenges and lead to positive changes that spread throughout the sector.

Nunavik aims to establish itself as a niche of excellence for sustainable, community-based, outdoor and cultural tourism.

The need to develop tourism based on sustainability principles has been a part of the general tourism policy framework in Québec since 2005, however recently it was reported that “to date none of the 21 tourism regions in Québec have produced a comprehensive regional scale sustainable development strategy with a clearly articulated vision, set of achievable short and long-term objectives, and progress measure indicators”.¹ The ACCORD strategy represents one of the first official steps in Nunavik’s ongoing efforts to meet this challenge and become the first tourism region in Québec to create and implement a sustainable tourism development strategy.

To maximize the chances for success in the implementation of this strategy, it is important to build on the work that has been initiated in the communities over the past five years and remain tightly focused on the niche of sustainable, community-based, outdoor and cultural tourism. Furthermore, by setting manageable goals and concentrating the energy and efforts of all the groups involved on the tasks which industry stakeholders have the most control over, it is possible maximize the potential for success in achieving the objectives and vision for the tourism industry outlined in this strategy.

¹ Priskin, Julianna ‘A portrait of Québec’s tourism sector in 2009 in its path towards sustainable development’, May 2009

1.4 Nunavik and the Nunavimmiut

Nunavik comprises the northern third of Quebec and covers a land area of 443,684.71 km², north of the 55th parallel. Nunavik means "place to live" in Inuktitut, and the people of the region call themselves Nunavimmiut. The population of the region is 11,627 (2006 census) and 90 percent of that population is Inuit. The population is concentrated in 14 villages spread along the Hudson and Ungava coasts.

This is an Arctic region of stark, surprising beauty composed of taiga forest and tundra – home to a spectacular wealth of Arctic wildlife and the world's largest herds of caribou. Natural attractions include the **Aurora Borealis**, the **Torngat Mountains**, **Pingualuit Crater** and the **Richmond Gulf**.

One of the most fascinating attributes of the region is the Nunavimmiut themselves – their culture, traditions and knowledge of the land. Despite the changes that have occurred since settlement, the Inuit of Nunavik have retained the vibrancy of their culture, keeping their language and traditions alive and staying close to the land that has supported them throughout their history.



Source: Nunavik Parks

1.5 The Natural Wonders of Nunavik

An important part of the reason tourists will come to Nunavik is to experience the splendour of its natural beauty and wildlife. Here are just a few of the natural wonders Nunavik has to offer the world:

- **One of the world's largest caribou herd** – George River Herd
- **Highest tides in the world** – 16.1 metres at Leaf Bay near Tasiujaq - 1 cm higher than Bay of Fundy, N.B.
- **World's largest colony of Thick Billed Murres** – at Cape Wolstenholme near Ivujivik
- **Furthest Northern stand of White Birch** – caused by a microclimate in Kuururjuaq National Park
- **Pingaluit Crater** – 3km-wide natural crater in Pingaluit National Park
- **Aurora Borealis** – visible throughout the region from September to October and March to April

And too many others to list.

“From a hike to the old Hudson’s Bay trading post, where a rare flower grows in an old graveyard, to a visit to the Tunit archeological site at Old Woman Lake, to climbing in the Torngats, this place is a very special place.”

*Kitty Annanack, Mayor,
& Johnny Sam Annanack,
Board Member, Kangiqsualujjuaq*

1.6 High-Level Objectives

Help realize tourism's potential as an economic driver for Nunavik by creating meaningful employment and new businesses for the social and economic benefit of local communities and individuals.

Activities

- Diversify the tourism in Nunavik (product types and regional distribution) in order to extend the benefits of tourism to more Nunavik communities and enhance opportunities for a unique visitor experience
- Increase the number of market-ready non-consumptive outdoor adventure/cultural tourism products in Nunavik, thereby becoming a competitive destination and capturing more of the Arctic adventure traveler and expedition cruise ship markets
- Leverage the investment in tourism development by focusing initial efforts and resources on pilot projects in the two gateway communities and four communities neighbouring national park projects

Marketing

- Improve national and international awareness of Nunavik as a desirable Arctic destination through the creation of a strong regional brand that promotes the authentic cultural and outdoor-adventure attributes of the region
- Earn recognition as a leader in sustainable, community-based tourism development, and use that platform to further benefit Nunavimmiut throughout the national and international tourism community

Infrastructure

- Build the necessary infrastructure and services needed to increase the tourism capacity of Nunavik communities and thereby increase and support new economic opportunities for local businesses

1.6 High-Level Objectives (Cont)

Development and Innovation

- Create a tourism data collection system to establish baseline tourism statistics and continuously monitor the effects of tourism development on the region. Use data to manage Nunavik's tourism assets and set appropriate goals for further economic development
- Improve the level of tourism excellence and innovation in product development through the adoption of industry recognized quality and safety standards

Alliances

- Organize the tourism industry to facilitate open dialogue between the private and public sectors and ensure local participation in the creation and implementation of the strategies and action plans

Training and HR

- Further develop training tourism opportunities, including mentoring, exchanges and apprenticeships to deliver authentic, safe, high-quality visitor experiences
- Provide technical support and expertise for local human resources to competently take on the added responsibilities of identifying, developing and managing sustainable tourism projects in their community
- Ensure adequate remuneration for Inuit workforce

Organization

- Develop the administrative tools (policies, regulations, programs, and action plans) to help achieve the common vision of a sustainable tourism industry and maximize positive economic and social benefits for the Nunavimmiut

1.7 Benefits

Economic Development

- Uses sustainable development model to provides **fair and equitable distribution of profits** in all partnerships with tour operators, and increasing tourism revenues that stay in the region
- Creates of **meaningful employment and new businesses** in communities and increased opportunities for local entrepreneurs
- **Increases revenue potential** for existing sport hunting and fishing camps that extend their season by diversifying their product and services to attract the outdoor and cultural traveller
- **Improves tourism services and facilities** that build capacity at the local community level and attract or enhance economic opportunities
- **Builds human resource capacity** and provide transferable skills through tourism development training and mentorship programs
- Demonstrates industry leadership as **in sustainable, community-based tourism development** by piloting innovative ideas, partnerships, and best practices that benefit local, national and international tourism stakeholders
- Generates secondary economic benefits directly or indirectly related to tourism, such as **increased income and spending** in the communities, **opening new markets** for local products (i.e. country food and arts and crafts) or **increased awareness of Nunavik's natural assets** that lead to other economic activity (i.e. film industry)

Social Well-Being

- **Empowers local people** by determining and managing for themselves the types of tourism development deemed compatible with their culture and values
- **Improves the quality of life for Nunavimmiut** through the economic benefits of tourism
- Enhances infrastructure and creates multi-use facilities that **serve the needs of both visitors and local residents**
- Creates positive **career opportunities for youth** motivating them to stay in school and away from drugs and alcohol.
- Provides much needed **income earning opportunities for elders** (e.g. story telling, traditional skills, etc.)

1.7 Benefits (Cont)

Cultural Preservation

- Provides a framework in which **Inuit art, language, culture and history can be retained** by future generations through increased opportunities for **elders and youth to work together** and share traditional knowledge in a new economic activity
- Increases awareness for the need to appropriately manage and **protect archaeological and other culturally sensitive areas**

Ecological Sustainability

- Provides a framework for natural resource development that **values low-impact, non-consumptive activities and maximises sustainable, long-term economic growth.**
- Increases awareness of proper waste management and improved land-use patterns that promote **conservation, preservation and enhancement of natural and wildlife resources** for the long term benefit of Nunavimmiut

1.8 Opportunities & Challenges

Opportunities and Responses

Opportunity: There is currently no clear market leader in Arctic Tourism

Response: Establish Nunavik as a leading destination for sustainable outdoor and cultural tourism in the Arctic

Opportunity: The region has a vibrant, living culture and exceptional natural setting and wildlife

Response: Make sure products and branding being developed prominently feature Nunavimmiut culture and Nunavik's nature

Opportunity: There is little available expertise in sustainable, community-based, outdoor and cultural tourism in an Arctic and aboriginal context available in the marketplace

Response: Support the development of locally based tourism training and consulting companies and create partnerships with appropriate tour operators and educational institutions and explore the possibility of offering CEGEP- level tourism education in the region

Opportunity: Good existing hotel and air-travel infrastructure make it relatively easy to travel to and stay in Nunavik communities

Response: Capitalize on this advantage by providing infrastructure support and training support to hotels and airports in order improve service levels to world-class standards

Opportunity: Outfitters provide a base of experience to build outdoor tourism offering

Response: Support outfitters in diversifying to offer outdoor and cultural tourism products

1.8 Opportunities & Challenges (cont.)

Challenges and Responses

Challenge: In general there is a lack of market-ready outdoor and cultural tourism products available

Response: Continue to implement the pilot project strategy, support existing operators, partner with world-class operators and encourage growth of the cruise sector

Challenge : The region doesn't have recognizable brand or identity to set it apart from other Arctic destinations

Response: Create a strong, unique, recognizable brand, based on the natural attractions and the people of Nunavik to use in all marketing activities

Challenge: Cost of tourism development, operations and transportation is high

Response: Adopt a differentiated product strategy to support premium pricing and negotiate fares with airlines

Challenge: There is a shortage of experienced, qualified, certified staff for Outdoor and Cultural tourism

Response: Implement the regional training plan and partner with leading educational institutions to expand the pool of qualified workers

Challenge: There are not many experienced tourism entrepreneurs in the communities

Response: Encourage hunting and fishing operators to diversify and provide training and support to new entrepreneurs

Challenge: There are many organizations with a hand in tourism but little coordination and cooperation between them

Response: Implement new industry coordination structure including a steering committee of high-level stakeholders

Challenge: Most government funding takes the form of short-term commitments which makes communities and individuals feel insecure about taking a risk on tourism

Response: Require at least medium-term commitments from all funding partners

1.8 Opportunities & Challenges (cont.)

Challenges and Responses 2

Challenge: Nunavut and other northern destinations already marketing aggressively

Response: Move quickly on the regional branding initiative

Challenge: Operators margins are vulnerable to major fluctuations in fuel prices that affect airfares and cost of operations

Response: Ensure that a niche product strategy is followed to support elastic pricing, and ensure that infrastructure and product investments are in scale with the region

Challenge: In some cases there is friction between local community organizations during tourism development because of competition, a lack of communications and lack of clearly defined roles

Response: Create local Tourism Advisory Committees to allow all main groups to participate

Challenge: Some of the Pilot Project communities have either limited or no food service at all

Response: Establish catering/food service strategy for the 5 Pilot Project communities that can later be rolled out for the rest of the region

Challenge : The region doesn't have a centralized travel agency or inbound (receptive) tour operator making it challenging for individuals and the tourist trade to book travel to the region

Response: Work with the FCNQ agency to develop an inclusive regional travel agency/receptive tour operator

1.9 Principal Initiatives

What are the concrete actions identified through the consultation and planning process in order to support the development of Nunavik as a niche of excellence in sustainable, community-based Arctic Tourism?

Activities and Services

- Conduct a complete inventory of cultural, natural and adventure activity sites of interest in the region
- Perform a benchmarking of other Arctic destinations and of international tourist product preferences
- Continue to develop sustainable outdoor and cultural tourism products through the Community Tourism Pilot Projects (currently underway in Kuujjuaq, Kangiqsujaq, Kangiqsualujjuaq, Puvirnitug, Inukjuaq)
- Work with niche cruise providers and communities to increase and improve shore visits
- Support existing operators and new entrepreneurs in upgrading and developing new product (through Pilot Projects, KRG REDD and KLDC funding, DEC funding, MDEIE funding)
- Develop a tourism food service strategy including country food, prepared meals and local catering
- Work to implement AEQ standard for adventure tourism and STAQ standard for aboriginal tourism as standards for all new and existing products being offered to the international market
- Develop and implement a regional sustainability, safety, risk management and insurance strategy

Marketing

- Develop a regional brand strategy and media campaign that features the people and natural beauty of Nunavik and focuses on sustainable, community-based outdoor and cultural tourism
- Increase tactical marketing funds available to NTA to allow them to hire a Marketing Manager and support staff to take on the many of the initiatives outlined in this plan
- Coordinate regional marketing expenditures by creating a shared marketing strategy that includes the MTO, NTA, Nunavik Parks, Makivik and other major regional players
- Create or upgrade marketing materials for Pilot Project communities
- Apply to EDC for PMI marketing funding
- Establish a regional inbound/receptive tour operator and travel agency based on current FCNQ travel agency

Infrastructure

- Invest in upgrading airports in hub and pilot communities (including expansion of Kuujjuaq to an international airport and Puvirnitug to a jet-capable airport and upgrades to local airports)
- Build and staff infocentres in hub communities and collaborate with Parks to create multi-function infocentres / interpretation centers in pilot project communities
- Identify and support local trail building projects (both land and marine-based)
- Study the need for upgrading the region's hotels and purchase Arctic Base Camps for Pilot Project communities
- Study the need for upgraded marine infrastructure and cruise-ship greeting pavilions

1.9 Principal Initiatives (cont.)

Development and Innovation

- In 2010, create report based on Pilot Project experience to track results and make recommendations for development in other communities
- Establish full-time tourism research resource at AVATAQ to support development of cultural content for tourism products
- Create partnerships with leading tourism education institutions
- Investigate possible strategies for the implementation of carbon offsets with clear benefits for Nunavik

Human Resources

- Continue to implement KRG's regional tourism training plan in the Pilot Project communities (KRG to pay 60% of applicable training costs for businesses and up to 100% for not-for-profit organizations)
- Create a directory of post-secondary tourism programs and establish relationships with key institutions
- Fund on-the-job-training and mentoring initiatives by business and not-for-profits involved in tourism
- Encourage the creation of Nunavik-based tourism training businesses
- Create a promotional package for Careers in Tourism to be distributed in high schools
- Involve Saputiit both as a stakeholder and as a funder in the tourism development process
- Implement a youth internship program to encourage employers to hire and train youth

Alliances and Partnerships

- Establish relationships strong with the travel trade
- Create an ACCORD roundtable with the Cree and the "Jamésien"

Organization and Finance

- Establish a regional tourism coordination framework (development coordination, training coordination, and advisory committee and issue specific committees)
- Establish community tourism coordination framework (local coordinator, local advisory committee)
- Establish an ACCORD steering committee (representatives of regional stakeholders, provincial stakeholders and federal stakeholders)
- Hire an ACCORD Director and hire KRG tourism development team

1.10 Measurable Economic Impacts

5-year Direct Employment Impacts*

Regional Coordination

- Minimum 4 permanent full-time positions in coordination and 1 in IT

Community Pilot Projects

- Minimum 5 permanent full-time positions in coordination (1 for each Pilot Project community)
- 25-50 part-time jobs (varies per community) by 2015

Cruise Lines

- 1 full-time position
- 10-20 part-time positions

Parks (Pingualuit and Kuururjuaq)

- 2 new permanent positions (park management and wardens)
- 3-5 new seasonal part-time positions (guides and support staff)
- This project should lead to 8 full-time administrative positions in Kuujjuaq (KRG Website)

Sub total: 21 full-time positions and 35-75 part-time jobs

Indirect Employment Impacts

- Growth in tourism employment also drives increased employment for infrastructure providers (hotels, airlines, food service). A typical ratio is that every direct job in tourism creates 2 indirect jobs in support services and in the general local economy.

Sub total: 40 full-time and 75 part-time

Total: 60 full-time jobs 115-150 part-time jobs

** These figures are estimates based on input from stakeholders and information from the KRG TTO*

1.10 Measurable Economic Impacts (Cont)

15-year Direct Employment Impacts*

Regional coordination

Minimum 4 permanent full-time positions in coordination and 1 in IT (no increase)

Community Pilot Projects

- Minimum 5 permanent full-time positions in coordination (1 for each Pilot Project community)
- 15 permanent jobs in tourism businesses
- 75-100 part-time jobs (varies per community) by 2025

Cruise Lines

- 5 full-time positions
- 20-40 part-time positions

Sub total: 24 full-time positions and 95-140 part-time jobs recalculate

Indirect Employment Impacts

- Growth in tourism employment also drives increased employment for infrastructure providers (hotels, airlines, food service). A typical ratio is that every direct job in tourism creates 2 indirect jobs in support services and in the general local economy

Sub total: 48 full-time and 140 part-time

Total: 72 full-time jobs 235-280 part-time jobs

** These figures are estimates based on input from stakeholders and information from the KRG TTO*

1.10 Measurable Short-term Economic Impacts (Cont)

The best information currently available indicates that approximately 1000 tourists per year currently visit Nunavik for outdoor and cultural tourism. That number represents a steep increase over the figures from just a years due to the sudden growth in the cruise segment.*

5-year Growth Targets

- Attract a total of **2000** outdoor and cultural tourists to the region by Year 5 (represents **1000 new** tourists – 100% percent growth). This level of growth will generate **\$5 million** (at average \$5k per one week package) in direct additional revenue for a total of **\$10 million** earned annually from outdoor and cultural tourism
- Generate **\$1 million** in additional revenue from business tourism by Year 5 (500 travellers at average 2K per week)

15-year Growth Targets

- Attract **4000** outdoor and cultural tourists to the region by Year 15 (represents **2000 new** tourists – 100% percent growth over Year 5). Additional annual income generated is **\$10 million** (at average \$5k per one week package) for a total of **\$20 million** earned annually from outdoor and cultural tourism
- Generate **\$3 million** in additional revenue from business tourism by Year 5 (1500 travellers at average 2K per week)

* These figures are estimates based on input from stakeholders and information from the KRG TTO

2 - Methodology

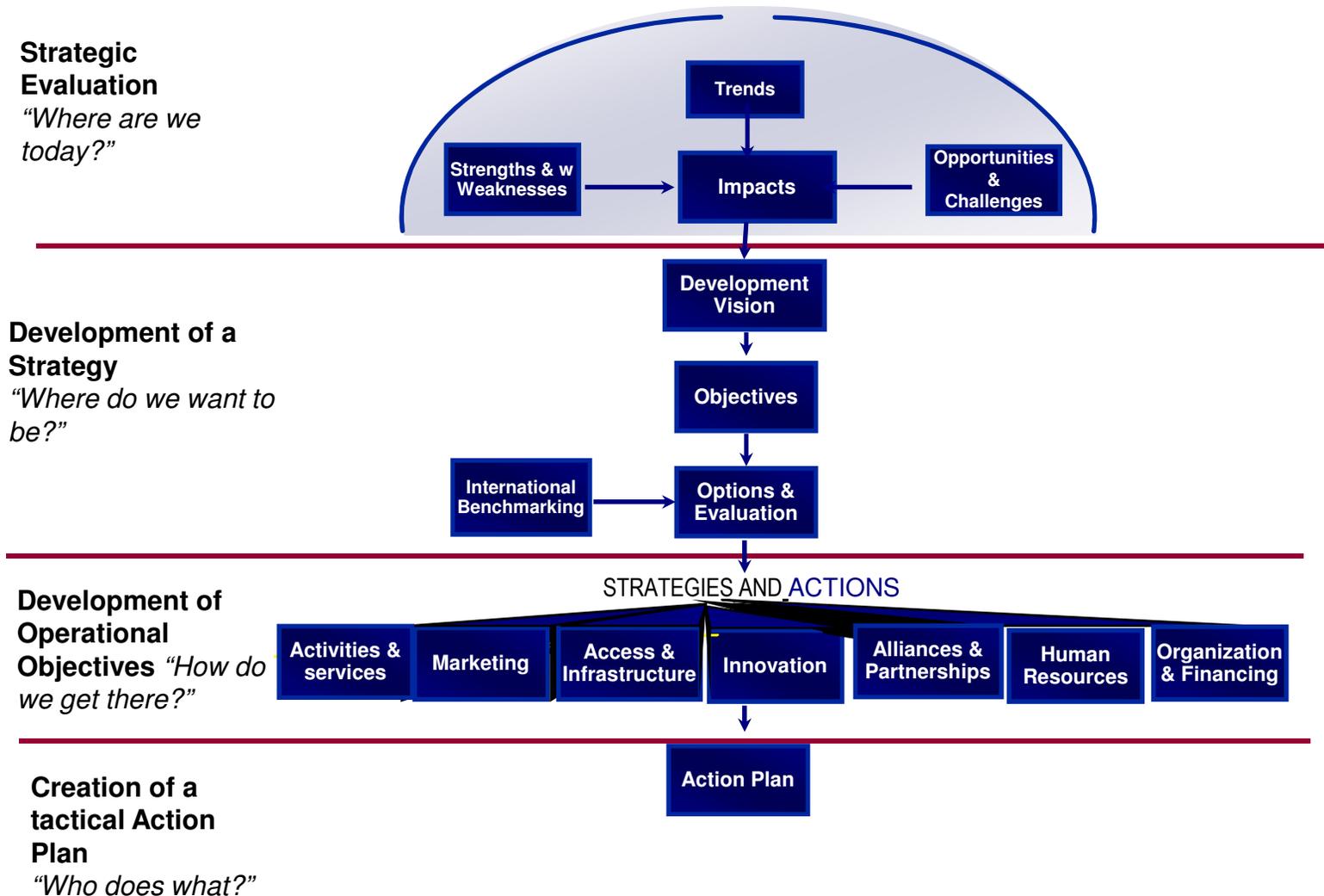
The Process & Information
Sources used for this Project



Source: www.tourismequebec.com

2.1 The Process

The ACCORD process for the Nunavik tourism niche followed the process illustrated below with input from all the major stakeholders during both the development of the Strategy and the Action Plan.



2.2 Sources of Information for this Project

Strategy, objectives and tactics in this report are all based on a synthesis of the Tourism Trends and Opportunities Report (2007) a major tourism analysis project undertaken by KRG, plus previous research projects and employs the provincially sponsored ACCORD approach and methodology. They are also based on a series of 16 meetings with the major tourism stakeholders in the region who took part in the ACCORD committee. The end result should be a strategy that fits the real needs and priorities of the Nunavimmiut while at the same time working harmoniously with overall provincial projects and programs.

Organizations represented on the ACCORD Committee: Kativik Regional Government (KRG), Makivik Corporation, Nunavik Tourism Association (NTA), Federation des Cooperatives Du Nouveau Quebec (FCNQ), Avataq Cultural Institute, Air Inuit, Tourisme Québec (MTO), Ministère du Développement économique, de l'Innovation et de l'Exportation ([MDEIE](#))

Secondary Research Sources

KRG Tourism Trends and Opportunities Study (May 2007)

- Five communities visited
- All regional and provincial organizations consulted
- Over 100 interviews conducted (including mayors, landholding general managers, tourism operators, tourism workers, elders and youth)

KRG Tourism Training Plan (May 2007)

- Analysis of key competencies by job position
- Training source book for training providers

NTA Strategic Plan (2009)

NTA Tourism Action Plan (2005-06)

Nunavik Strategic Tourism Plan (1996)

Tourisme nordique – diversité culturelle et d'aventure, Deloitte & Touche (2005)

Tourisme Québec, industry statistics (www.bonjourquebec.com/mto/index)

Canadian Tourism Commission (CTC), industry statistics (www.canadatourism.com)

World Tourism Organization (WTO), international industry statistics (www.wto.org)

3 - Tourism Trends & International Benchmarking

“Despite evidence of strong unmet demand for adventure and ecotourism on the international and Quebec markets, the industry continues to be in a precarious position and much of the market potential is going unmet.”

Canadian Tourism Commission (2003-2005 Strategic Plan)



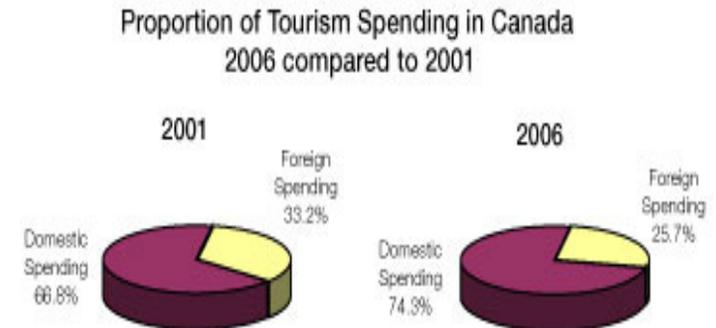
Source: www.tourismequebec.com

3.1 Canada Trends

- Total spending in 2006 reached **\$66.9 billion**, a **6.7% increase** vs. 2005 (*CTC 2006 Tourism indicators*)
- Tourism employment in 2006 **increased 1.4%** to 634,700. (*CTC 2006 Tourism indicators*)
- **Tourism deficit soared to \$7.2 billion** in 2006 (*CTC 2006 Tourism indicators*)
- In the U.S., our closest international market, **awareness of Canadian destinations is relatively low** (*CTC, 2003 International Adventure Travel and Outdoor Sports Show, Chicago Illinois*)
- Visitors want a **complete participatory experience**, providing new knowledge and authentic experiences such as arts, cultural entertainment, folklore, festivals, history and landscapes, cuisine, traditions and language (*WTO, News Bulletin, September 2002*)
- **Culture and heritage tourism** enthusiasts represent a **potential market of 34.5 million Americans and 2.6 million Canadians** (*CTC, discovering Heritage Tourism, March 2004*)

Conclusion

Canadian tourism industry is growing, but mostly powered by domestic spending. Canadians continue to spend more abroad. Cultural and outdoor tourism represent a growth opportunity. The challenge is to create more awareness.

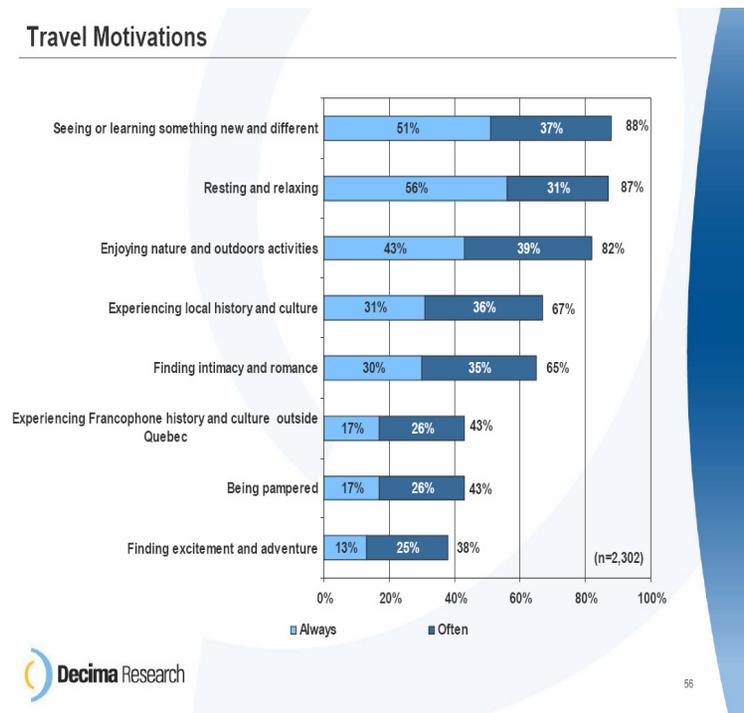


3.2 Quebec Trends

- Quebec tourist: 86% French. 65% spoken English good. 66% married. 33% have children at home. 20% have incomes of \$80k+. **35% earn under \$40k** (Source: OTMP Quebec Tourism Consumer Report, Oct 06)
- Despite strong international demand for outdoor tourism, capacity continues to lag and demand is unmet (Source: CTC 2003-2005 Strategic Plan)
- Key markets: **Ontario, U.S. Northeast, Western Europe**
- Outdoor tourism is **underdeveloped** and **lacks structure**. Quebec is **not a widely recognized outdoor destination**. **Very little product differentiation** between regions
- **Outdoor tourism** clients purchase products lasting **24 hrs or less with a total stay of 3 - 3.5 nights**. **Adventure Tourism** clients typically stay **more than 24 hours and a total stay of 4 - 4.2 nights** (Source: TQ, Nature et tourisme: l'écotourisme au Québec en 2002, 2002)
- **Quality initiatives only recently re-started by TQ** with AEQ and FPQ. Still a long way from readiness to deploy (Source: Louise Séguin, TQ)
- **Access to financing and HR recruitment** are also important issues (Source: Heritage Tourism, March 2004)

Conclusions

Although Tourisme Québec is working hard to re-orient towards an international focus, the outdoor offering and market remains focused on the internal market. Despite high world demand, small offering, lack of a quality standard and low overall awareness of Quebec as an outdoor tourism destination are holding the province back.



Type of Operator 1998 - 1999	Client + 24 hrs (%)	Typical stay duration (nights)
Outdoor (general)	38%	3.5
Adventure	56%	4.2
Ecotourism	32%	3.1
Outfitting	70%	4.0
Mixed Activities	51%	3.0
AEQ Members	63%	5.0

3.3 Nunavik Trends 1 - Outfitting

Although hunting and fishing outfitting are not an area of focus for the ACCORD strategy, they do represent the largest current segment of tourism activity in the region. It is hoped outfitters may diversify into outdoor and cultural activities providing much needed experience and expertise in this new area of tourism development

Outfitting Industry

- Relatively large and healthy industry (2,000-2,500 visitors per year)
- Many sophisticated and professional operators
- Low growth over past 5 years
- Most outfitters belong to NTA
- Significant differences in the level of marketing between organizations
- Not all have web sites. Some go to trade shows, advertise, and distribute brochures. Some rely strictly on word of mouth
- Typical challenges for a seasonal industry (retaining quality personnel, running a profitable business with only one season)
- Other challenges include herd and fish stock variations, exchange fluctuation and high cost of transport and operations
- Core market is Quebec, Ontario and eastern U.S.

Species and Seasons

- Hunting: caribou, black bear, small game (August to October)
- Fishing: Arctic char, Atlantic salmon, brook and sea run trout, lake trout (June 1 to September 7)
- Weather in spring and fall also limit season length

“Local outfitters would like to expand operations to two maybe even three seasons but it is expensive to develop new products and promote them.”

Sammy Snowball, Qiniqtiq Landholding

Some of Nunavik's outfitters

- Alummi Adventures
- Arctic Adventures
- Diana Lake Lodge (High Arctic Adventures)
- High North Outfitters
- Pyramid Mountain Camp
- Rapid Lake Lodge
- Safari Nordik
- Silak Adventures
- Ungava Adventures

3.3 Nunavik Trends 2 - Outdoor and Cultural

Outdoor and cultural tourism represents the niche where the ACCORD strategy will focus its development efforts and where KRG has been focusing its training activities over the past 3 years.

Outdoor Tourism Industry

- Outdoor / cultural: 1,000 visitors approx. per year.
- Growth mainly due to cruises. Prior number was max. 150-200
- Cruise North Expeditions predicted in 2007 over 50% of clients will be European (up from less than 10 % 2006)
- Few outdoor tourism operators (CNE, NASTC and Kunoki)
- Some outfitters also offer outdoor products as a sideline
- Very few providers highlight the cultural component
- Outdoor tourism represents best opportunity to build market leadership by focusing on uniquely Arctic experiences and emphasizing cultural component
- Core market is Quebec, Ontario and eastern U.S. With active promotion and development of more market-ready products Western Europe could become a significant market.

Typical Activities

- Outdoor: Canoeing, kayaking, cruises, dogsled expeditions, survival expeditions, hiking, snowmobile expeditions, wildlife observation, etc.
- Cultural: Storytelling, throat singing, traditional food preparation, clothing making, berry picking, archeological site visits, etc.

Seasons

- Summer: July to early October
- Winter: January to March
- Weather in spring and fall is too unpredictable for profitable outdoor operations

“Featuring Inuit knowledge on Arctic survival is what has taken us from a training business to a tourism business. We now have visitors from all over the world coming to Puvirnituk.”

Jakusi Ittukaluk, NASTC

Some of Nunavik’s operators

- Alummi Adventures
- Adventure Canada
- Cruise North Expeditions
- Diana Lake Lodge (High Arctic Adventures)
- Kunoki
- Nunavik Arctic Survival Training Centre

3.3 Nunavik Trends 3 - Business Tourism

Business tourism (tourism by local and international business travellers) is not a focus of the ACCORD strategy. But its complementarity with the international Outdoor and Cultural market is important in that demand from business tourism will help drive early demand for outdoor and cultural products and hasten profitability.

Business Travel

- 1,000+ visitors
- This number does not display significant growth
- Business travel isn't currently being translated into business tourism
- Growth is slow because business tourists have to find their own products (use personal connections to find guides)
- Hotel network provides a strong basis for business tourism
- Market for business travel is Nunavik and Quebec

Hotel Statistics for 2007

- 195 units (up 22.4% from 2006)
- Occupancy down 10% from 52.7% to % 42.6%
- Average cost per night increased approx. 5% from \$201 to \$213

“We really believe in the opportunity for business tourism. But we need local products to make it happen. FCNQ is working actively to identify local products and we hope to partner with local landholdings and KRG to jumpstart this area of tourism.”

Sean McDonagh, FCNQ

Some of Nunavik's operators

- FCNQ Hotels
- First Air
- Air Inuit

3.3 Nunavik Trends 4 - Growth Outlook

- Outlook for growth of **Outfitting** depends on the ability of the industry to offer a differentiated product and to promote themselves on the National and U.S. Northeast markets. General market conditions are flat, and there is fierce price competition. Growth is likely to be low or flat. Outfitting is not a focus of the ACCORD strategy
- Global markets for **Outdoor / Cultural tourism**, especially for “new” destinations, aboriginal destinations and equitable/sustainable products are in high growth. But in order for Outdoor and Cultural tourism niche to expand in Nunavik, the region will need to develop a brand, new world-class product and improve the overall support structure for the tourism industry.
- Limited infrastructure, population and the desire to minimize natural and cultural impacts indicate that a **high-price, high-value, niche, differentiated strategy** should be employed in the promotion of the region. Mass tourism is not the objective.
- There is already a high level of business travel. With more tourism products available, it should be possible to **generate significant new tourism revenues with existing business travel**. While business tourism is not a focus of this strategy, the reality is that the growth in business tourism will help drive Nunavik’s tourism industry toward economic viability more quickly than relying on international clientele alone.

3.3 Nunavik Trends 5 – Growth targets

5-year Growth Targets

- Attract a total of **2000** outdoor and culture tourists to the region by Year 5 (represents **1000 new** tourists – 100% percent growth). This level of growth will generate **\$5 million** (at average \$5k per one week package) in direct additional revenue for a total of **\$10 million** earned annually from outdoor and cultural tourism
- Generate **\$1 million** in additional revenue from business tourism by Year 5 (500 travellers at average 2K per week)

15-year Growth Targets

- Attract **4000** outdoor and culture tourists to the region by Year 15 (represents **2000 new** tourists – 100% percent growth over Year 5). Additional annual income generated is **\$10 million** (at average \$5k per one week package) for a total of **\$20 million** earned annually from outdoor and cultural tourism
- Generate **\$3 million** in additional revenue from business tourism by Year 5 (1500 travellers at average 2K per week)

Expenditures on regional marketing and tourism infrastructure should also drive some additional growth for hunting and fishing outfitters.

3.4 Benchmarking - Northern and Aboriginal Tourism

Nunavut (www.nunavuttourism.com)

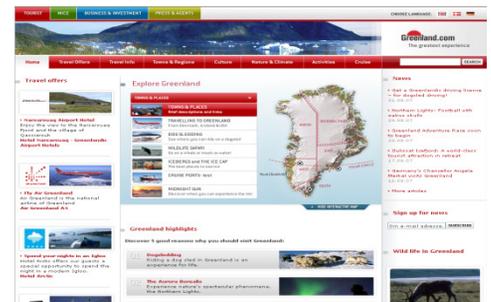
- Tagline: Untamed, Unspoiled, Undiscovered
- Positioning plays strongly on Inuit culture and Arctic experience
- Association active in marketing the region (not so active in development)
- More developed community tourism and outdoor tourism than Nunavik
- Still relatively few market-ready products
- No recognized quality certification program
- Challenges in terms of HR and training

Yukon (www.travel yukon.com)

- Tagline: Larger than life
- Professional branding and large investments in communications
- Much more focused on nature and activities than on the aboriginal component
- Yukon Wild brand for 28 adventure operators (but not a true quality initiative)
- More than 30 hunting and fishing outfitters
- Approx 300,000 visitors per year. Largest Canadian northern destination
- Tourism association is a very active in promotion and development

Greenland (www.greenland.com/content/english/tourist)

- Tagline: The greatest experience
- Some emphasis on aboriginal culture, as much emphasis is placed on Viking past
- Some market-ready products (but not a lot of choice)
- No obvious quality certification



3.5 International Benchmarking

Three World Leaders

Australia – Eco and Aboriginal tourism

- <http://www.australia.com>
- <http://www.indigenoustourism.australia.com/>
- <http://www.tourismaccreditation.com.au/>



New Zealand – Eco and Aboriginal tourism

- <http://www.newzealand.com/travel/northamerica/>
- <http://www.maoritourism.co.nz/>
- http://www.newzealand.com/travel/qualmark/qualmark_home.cfm



Costa Rica – Ecotourism

- <http://www.visitcostarica.com>
- <http://www.turismo-sostenible.co.cr/EN/home.shtml>



What do all these destinations have in common?

Each of these destinations is challenged due to distance from their main markets. In the case of Australia and New Zealand each also has the added aspect of marketing a differentiated aboriginal tourism product (as does Nunavik). Each of these destinations invests heavily in regional destination marketing and brand. They also have strong, high-quality tourism product offerings that focus on sustainability and are backed up by quality certification programs.

3.6 The New Zealand Story

The tourism industry is a major motor for economic growth, especially in isolated regions such as Queenstown (pop. 17,040) and Dunedin (pop. 114,342)



New Zealand

- Population: 3,737,277 (2001)
- Maori Population: 14% of total population
- Land area: 270,534 km²
- Tourism: 2,421,561 international visitors (2006)
- Growth: 1.6% since 2005
- Tourism expenditures: \$17.5 billion (\$14.3B CDN)
- Tourism contributes (directly and indirectly) 18.7% to national GDP
- NZ divided into 28 tourism regions each with its own organization



Source: www.tourisminfo.govt.nz; www.tianz.org.nz; www.stats.govt.nz

3.6 New Zealand (cont.)

A number of key factors contribute to the success of New Zealand in turning tourism into a major force for economic growth. Some of these factors were natural competitive advantages (nature, culture, outdoor lifestyle, wildlife), but many are the product of extensive planning and implementation of numerous measures to promote the development of a world-class tourism industry.



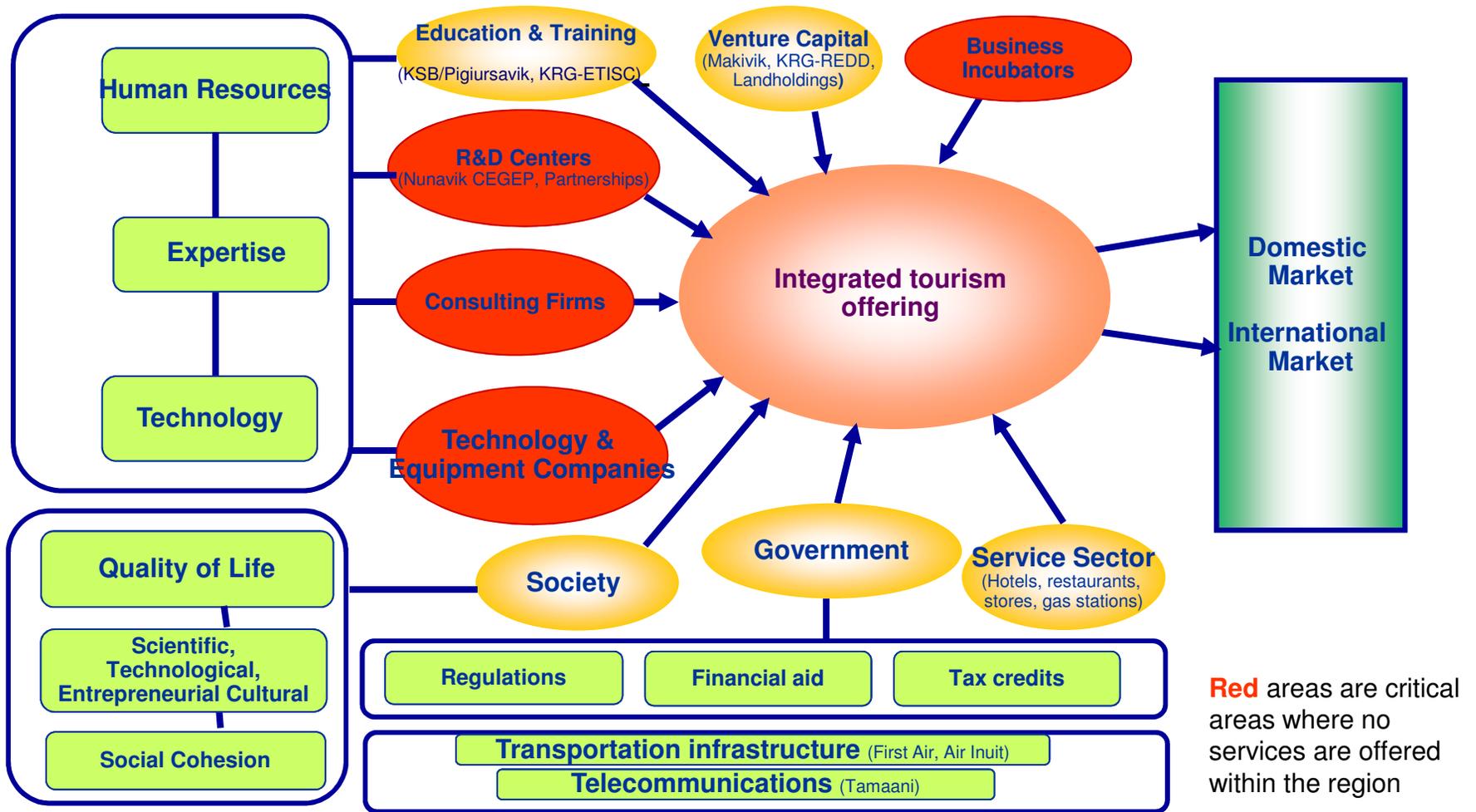
4 - The Strategic Action Plan

What are the objectives we are pursuing and what initiatives are we undertaking to achieve those objectives?



Source: Nunavik Parks

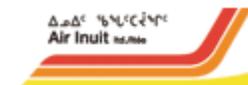
4.1 Overview of the Integrated Tourism System



4.2 Key Operators for Tourism in Nunavik

There are several tourism operators that should play an important role in the continued evolution of Nunavik as a leader for Arctic Tourism. Each of these organizations will play an important role in bringing this strategy to fruition:

- **Air Inuit** (www.airinuit.ca). Regionally owned (Makivik Corporation) and managed air carrier providing scheduled service to all communities, charter service for tourism operators as well as helicopter charters
- **Arctic Adventures** (www.arcticadventures.ca). Long-standing operator of hunting and fishing camps and outdoor tourism products
- **Cruise North Expeditions** (www.cruisenorthexpeditions.com). Innovative cruise line featuring world-class nature/culture tours departing from Kuujuaq (70% owned by Makivik Corporation). Named by Travel + Leisure Magazine as one of the “35 top innovators in tourism”
- **FCNQ Hotels** (fcng.netc.net). Regionally owned and managed chain of hotels serving every community
- **First Air** (www.firstair.ca). Regionally owned (Makivik Corporation) jet carrier providing service across the Canadian North
- **Nunavik Arctic Survival Training Centre** (www.nastc.ca). Leading provider of survival training and outdoor tourism experiences. All-Inuit field staff and trainers
- **Safari Nordik** (www.safarinordik.com). Leading outfitter for Caribou, Black Bear and Ptarmigan hunting



4.3 Key Regional Governmental Organizations

In Nunavik governmental organizations play an important role in almost every aspect of the economic and cultural life of the region. As such they are vital partners in the strategy to develop Nunavik as a niche of excellence for sustainable, community-based Arctic tourism. Here are some of the key organizations:

- **Nunavik Tourism Association (NTA)** (www.nunavik-tourism.com) for marketing
- **Kativik Regional Government (KRG)** (www.krg.ca) for employment and training as well as tourism development.
- **KRG Research Economic Development Department (REDD)** (www.katutjiniq.ca) For start-up business funding and economic development issues
- **Nunavik Parks** (KRG) for development involving new Nunavik's Provincial Parks.
- **Kativik School Board (KSB)** (www.kativik.qc.ca) long-term training programs and education
- **Makivik** (www.makivik.org) funding and economic development expertise.
- **Avataq** (www.avataq.qc.ca) Cultural Institute of Nunavik. Key collaborators for the development of the cultural component of new tourism products
- **Saputiit** (www.saputiit.ca) is the regional Youth association that represents the youth of all 15 communities



4.4 Centres for Development

Through a consultative process, **5 centres for development** were selected for Pilot Projects. Two are transportation hubs and three were selected because of their tourism potential and to tie-in with the development of new National (provincial) Parks:

Hubs:

Kuujuuaq (Ungava transportation and service hub)

Puvirnituaq (Hudson transportation and service hub)

Destinations:

Kangiqsujuaq / Wakeham Bay (Pingaluit National Park)

Kangiqsualujuaq / George River (Kuururjuaq National Park)

Inukjuak

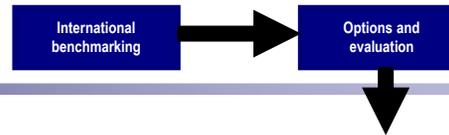
Focus for these projects is on organization, training and product development to make the communities as well as the products market-ready.



Sources :KRG TTO, 2007

The Pilot Projects will be based on a common development framework in each of these locations which will be documented and used as the basis for continued development in other communities. These projects represent a starting point for community-based tourism development in the region.

4.5.1 Activities & Services / Objectives



Operational Objectives

Strategy and Initiatives

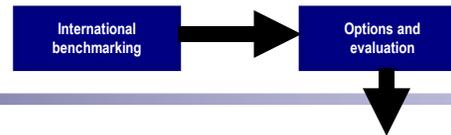
Activities & services



This section of the action plan deals with the concrete measures to take to ensure that there are enough attractions and activities in the region to appeal to the international, provincial, national and international markets. We also need to ensure that the products on offer need our objectives for the development of sustainable, authentic community-based adventure and cultural tourism Here are the objectives that were used as a basis for the initiatives proposed:

- 1.1 Focus development efforts on 5 tourism destinations (2 hubs – Kuujjuaq and Puvirnituaq and 3 end destinations – Kangiqsujaq, Kangiqsualujjuaq, Inukjuak)
- 1.2 Ensure that each hub and end destination has a differentiated theme or signature product
- 1.3 Develop specific products and packages based on themes related to the Inuit culture and adventure and that all development is based on the sustainable practices (attractions and destinations to draw travellers to the region)
- 1.4 Set up at least one international tourism accommodation complex at each of the region's hub and end destinations (includes services such as entertainment, activities, high-end food services, etc.)
- 1.5 Further develop the cruise sector
- 1.6 Encourage the establishment of tourism development support businesses based on regional expertise and experience accrued in communities (business and product development consulting, training, equipment sales, repair and rentals, etc.)
- 1.7 Support development in communities that are not among the 5 prioritized communities identified in this plan
- 1.8 Implement a regional risk management strategy and any needed extension of search and rescue capabilities

4.5.2 Activities & Services / Initiatives



Initiatives

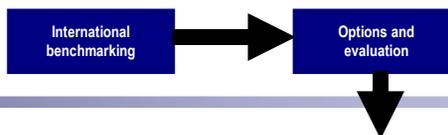
Strategy and Initiatives



Activities & services

- 1.1.1 Create and implement tourism planning committees in each of the 5 communities
- 1.1.2 Create and implement local community action plans (develop products and packages)
- 1.2.1 Develop regional product development strategy (to ensure complementarity between community tourism offerings)
- 1.3.1 Develop regional tourism potential inventory database (territories, sites, etc.)
- 1.3.2 Develop tourist code of ethics for tourists, for operators and for communities
- 1.4.1 Define and communicate the basic service levels (food service, laundry, etc.) expected in tourist accommodations
- 1.4.2 Work with MTO and CITQ to adapt ratings for hotels, for tents and cabins
- 1.4.3 Develop community welcome materials for accommodations and packages
- 1.4.4 Expand or build hotel accommodations in hub communities
- 1.4.5 Expand or build hotel accommodations in destination communities
- 1.4.6 Modernize hotel booking system
- 1.4.7 Develop a strategy for country food supply
- 1.4.8 Develop a strategy for country food inspection
- 1.4.9 Develop a regional cuisine expertise and service, accompanied by a training program
- 1.4.10 Develop a Nunavik-specific Arctic base camp concept for seasonal accommodation that incorporates local traditional designs and knowledge.

4.5.2 Activities & Services / Initiatives 2



Initiatives

Strategy and Initiatives

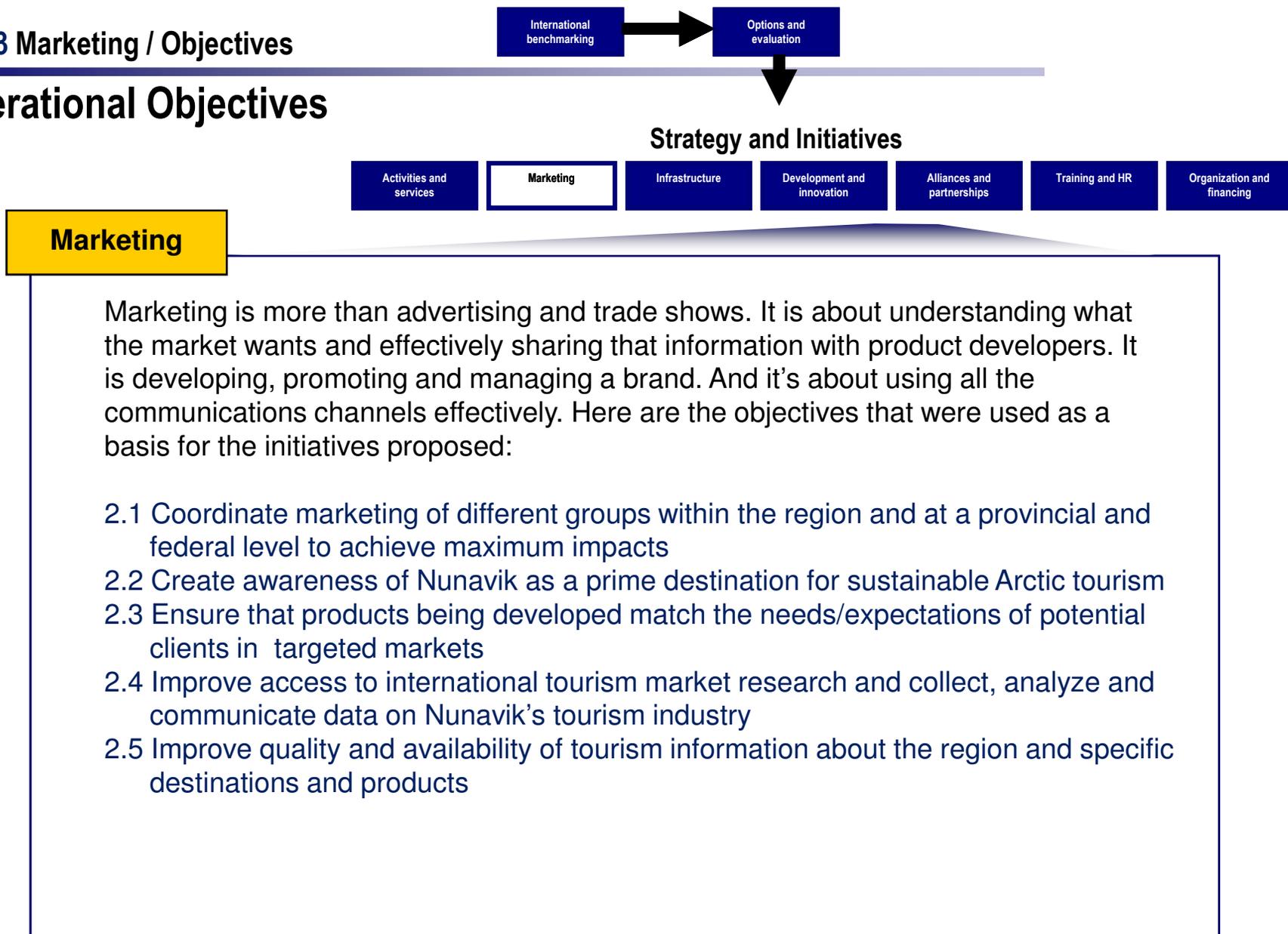


Activities & services

- 1.5.1 Develop sustainable shore visits products and create multi-day add-on products that will encourage cruise lines to stop in Nunavik more often
- 1.5.2 Develop products and services in Kuujuaq to service cruise turn-around clientele
- 1.5.3 Develop and communicate guidelines for cruise lines operating in Nunavik
- 1.5.4 Develop centralized greeting areas for cruise visits
- 1.5.5 Establish cruise monitoring for economic/social impacts (part of overall market research)
- 1.6.1 Create a repertory of resources for operators: accountants, lawyers, business consultants, funding sources, product development, insurance, risk management, etc.)
- 1.6.2 Develop businesses with specialized expertise to act as support system to tourism businesses (e.g. product development consulting, training, equipment rentals, accounting, legal services, insurance)
- 1.7.1 Develop and implement sustainable community based tourism models using the Pilot Projects as basis (eventually to reach the other 9 communities)
- 1.8.1 Create and implement a risk management plan (emergency planning, SAR procedures, etc.) for the tourists visiting the communities and doing activities in the wilderness
- 1.8.2 Produce and publish information (in brochures, on existing web sites, in FCNQ welcome packages, etc.) for 3 different clienteles (communities, operators and visitors)

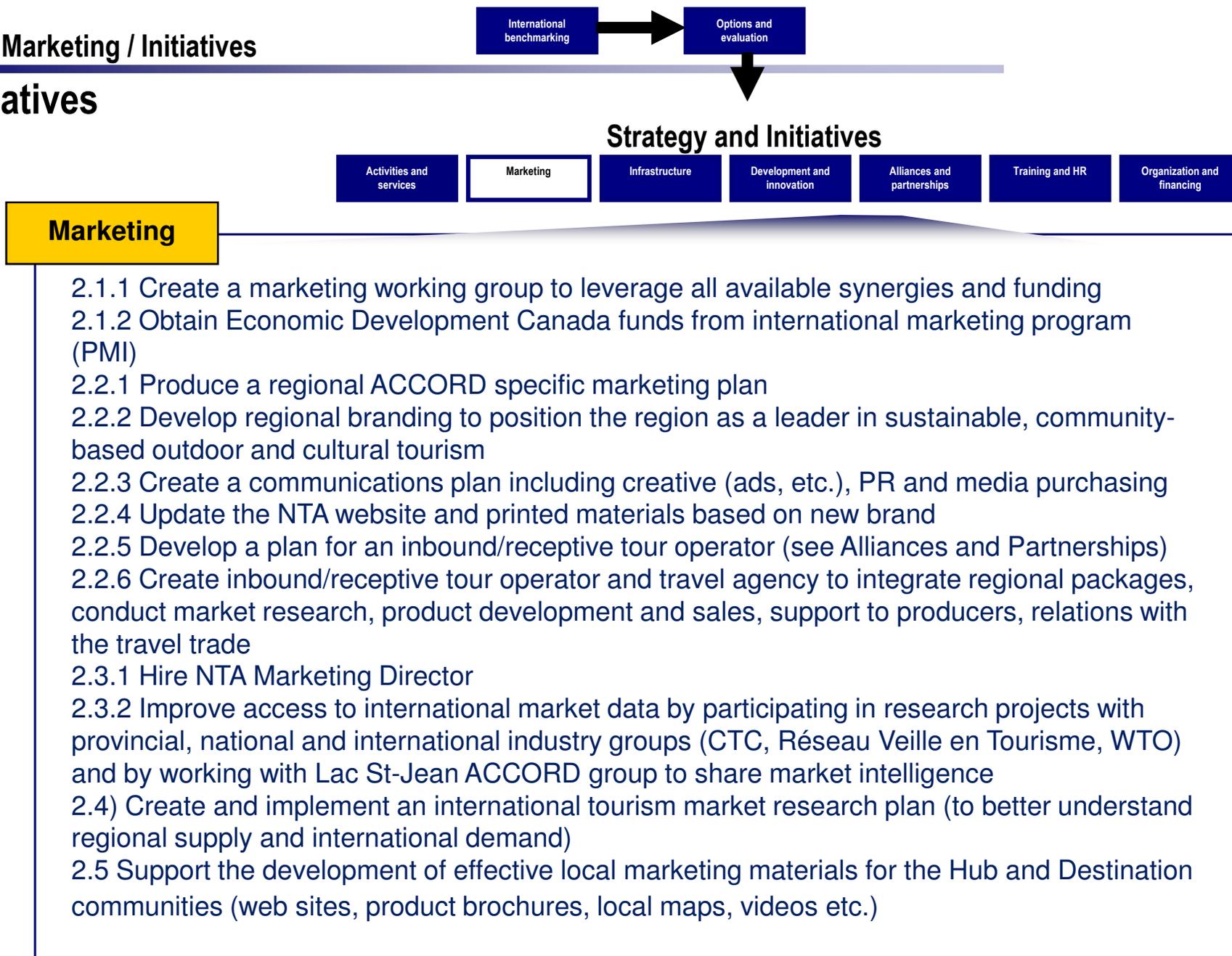
4.5.3 Marketing / Objectives

Operational Objectives



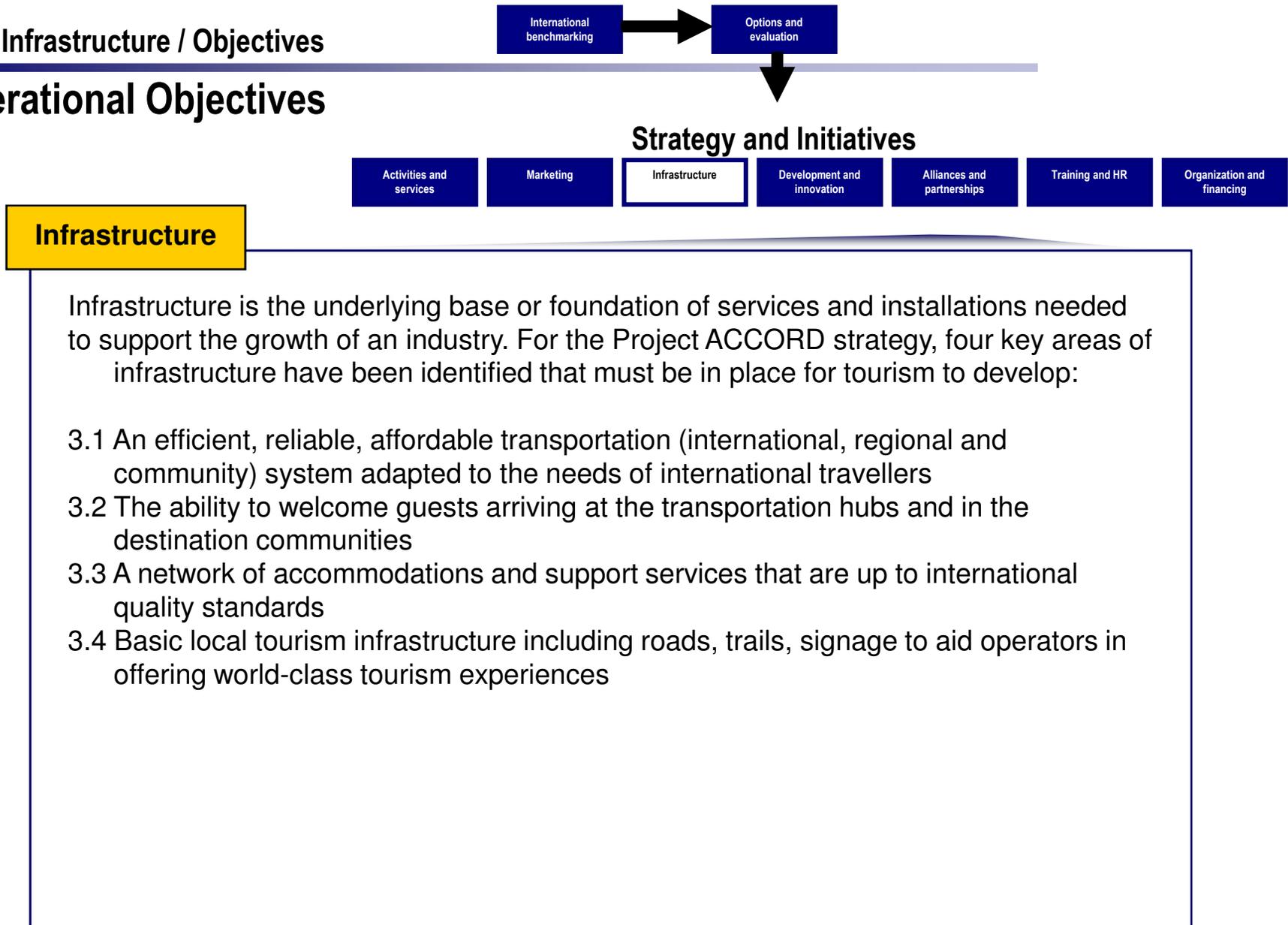
4.5.4 Marketing / Initiatives

Initiatives



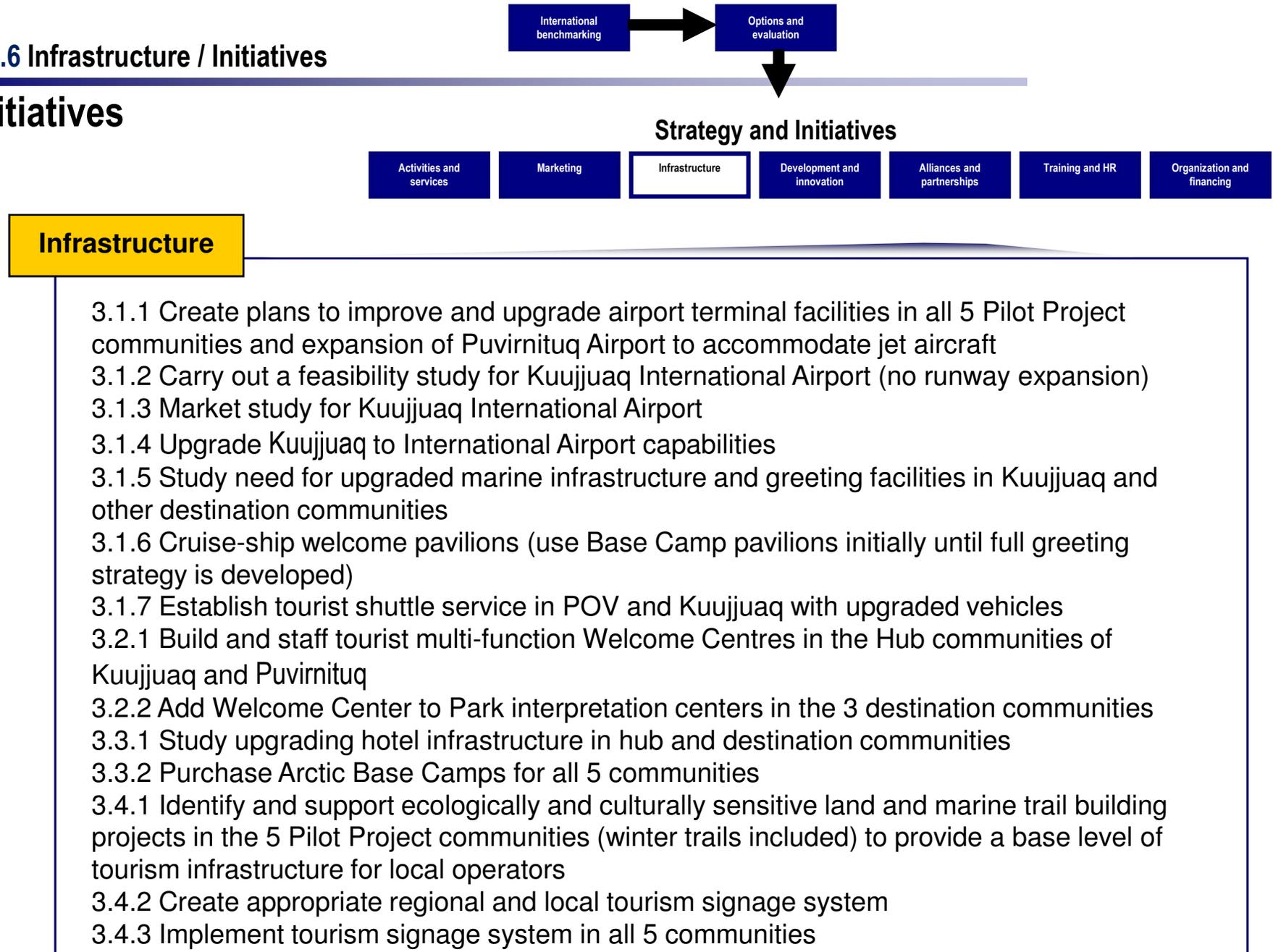
4.5.5 Infrastructure / Objectives

Operational Objectives



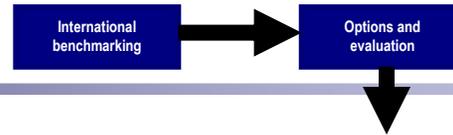
4.5.6 Infrastructure / Initiatives

Initiatives



4.5.7 Development / Objectives

Operational Objectives



Strategy and Initiatives

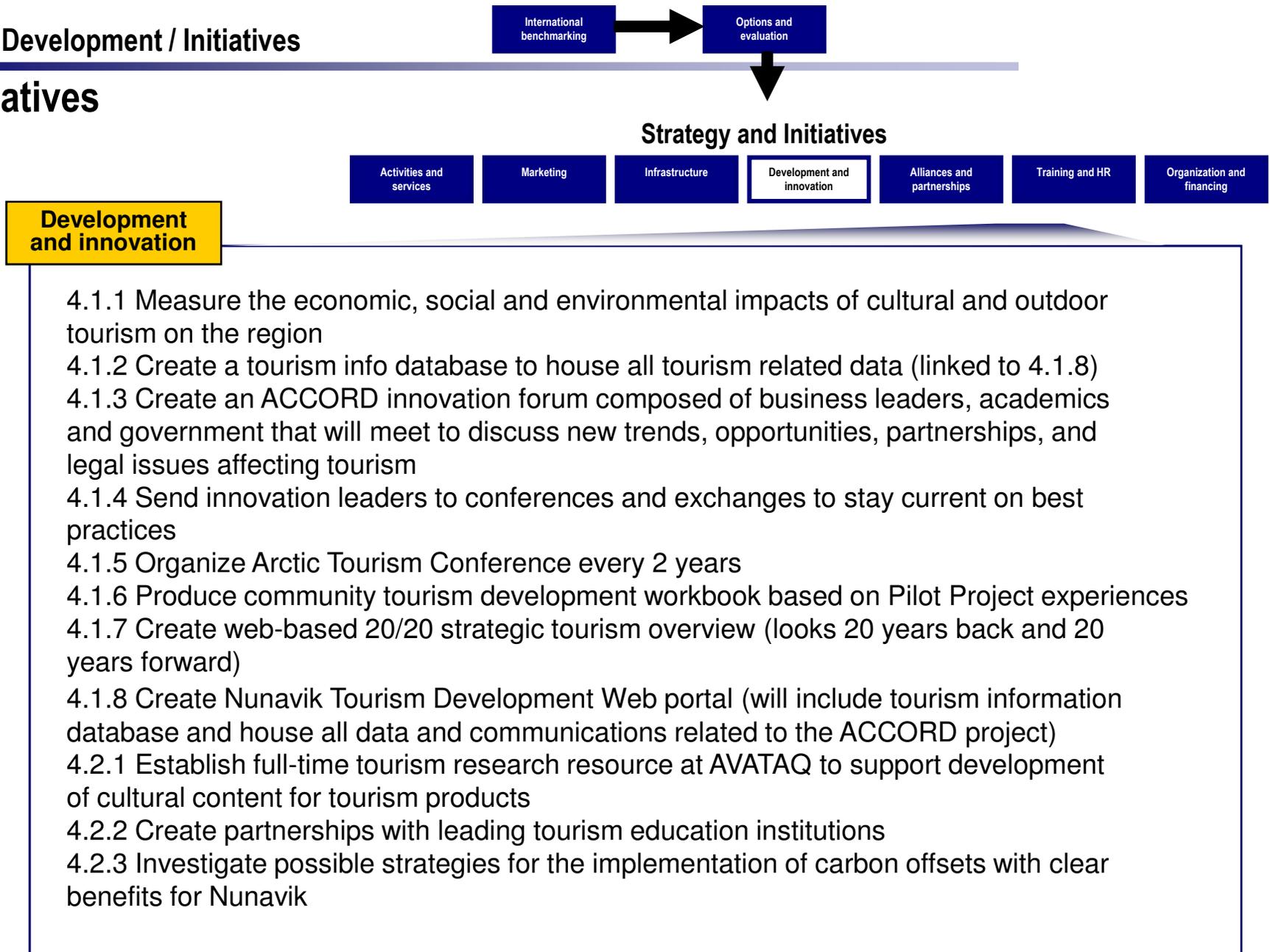


Development and innovation

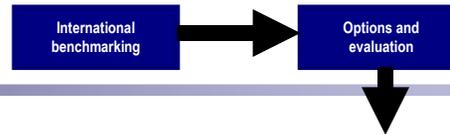
- 4.1 Ensure that Nunavik becomes a leader in development and innovation in sustainable, authentic, culturally appropriate, community-based Arctic Tourism
- 4.2 Build cultural interpretation, consulting, management and business concept development capacity within the region

4.5.8 Development / Initiatives

Initiatives



4.5.9 Alliances & Partnerships / Objectives



Operational Objectives

Strategy and Initiatives

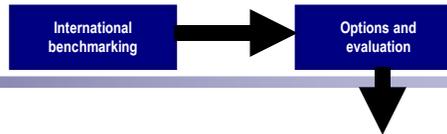


Alliances & partnerships

Alliances and partnerships are key drivers in tourism development. In order to drive development in Nunavik it is essential to:

- 5.1 Establish alliances and partnerships with tourism operators whose expertise and capacity can help expand and improve the overall product and service offering to ensure it is world-class and meets the preferences of our target markets
- 5.2 Establish partnerships with the travel trade
- 5.3 Develop relationships with other tourism regions that have complementary, world-class tourism offerings
- 5.4 Explore and develop possible relationships with resource sector enterprises and organizations

4.5.10 Alliances & Partnerships / Initiatives



Initiatives

Strategy and Initiatives

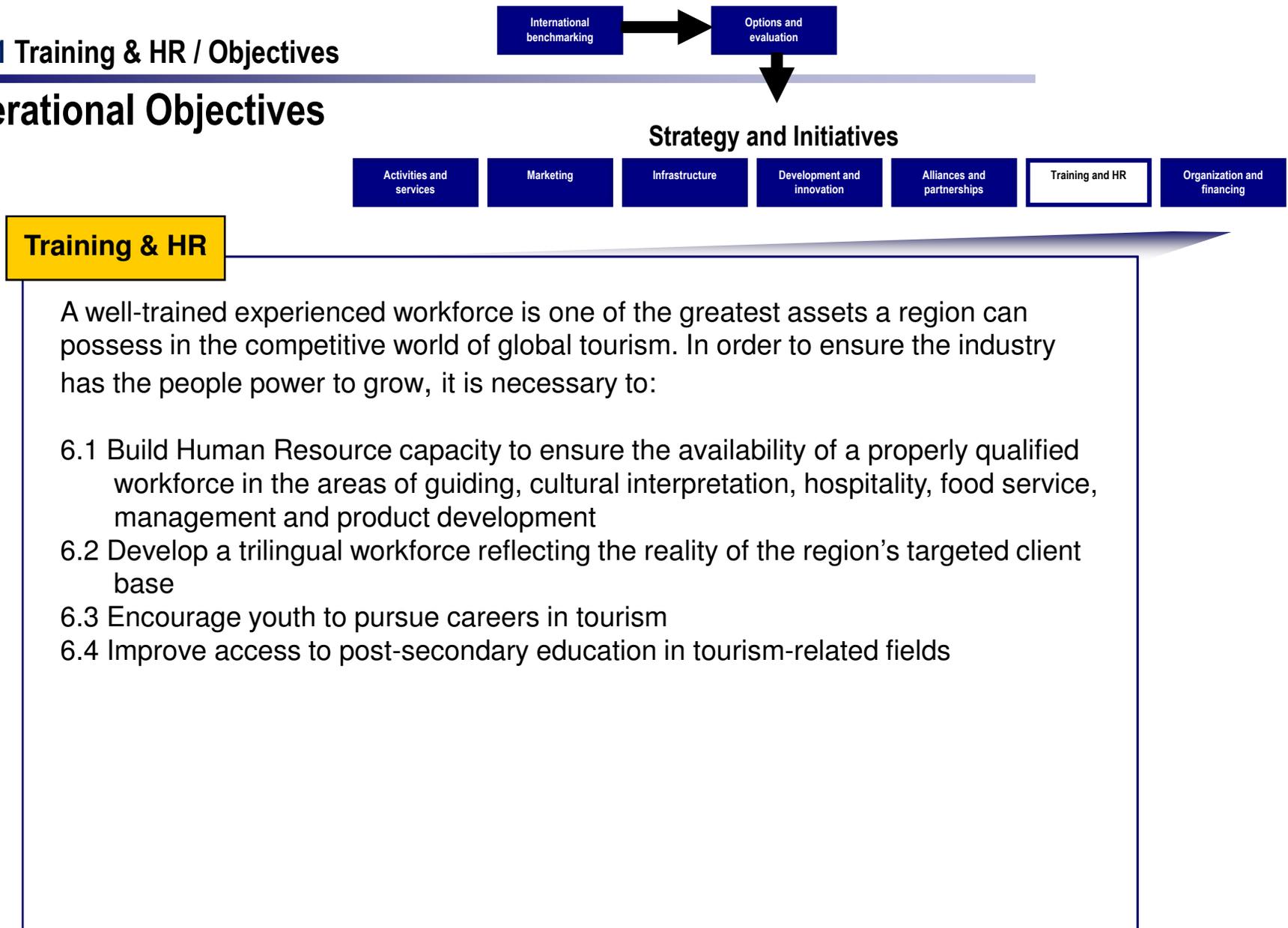


Alliances & partnerships

- 5.1.1 Develop an operational plan for a regional travel agency/receptive tour operator
- 5.1.2 Create a Nunavik-based receptive tour operator/travel agency that can consolidate products into regional packages and act as a central booking point for the region
- 5.2.1 Establish relationships in the travel trade negotiate with outbound tour operators in key markets
- 5.3.1 Establish ACCORD tourism working round table with the James Bay Cree and the “Jamésien”
- 5.3.2 Establish contact with other Arctic tourism destinations (Nunavut, Yukon, Greenland, Iceland, Norway, etc.)
- 5.4.1 Develop synergies between resource-based industries and tourism
- 5.4.2 Participate in consultations for future development of natural resource-based economic activities as an advocate for sustainable development
- 5.4.3 Develop eco-tourism packages that explore the impact of natural resource-based economic activities in partnership with resource-based industry

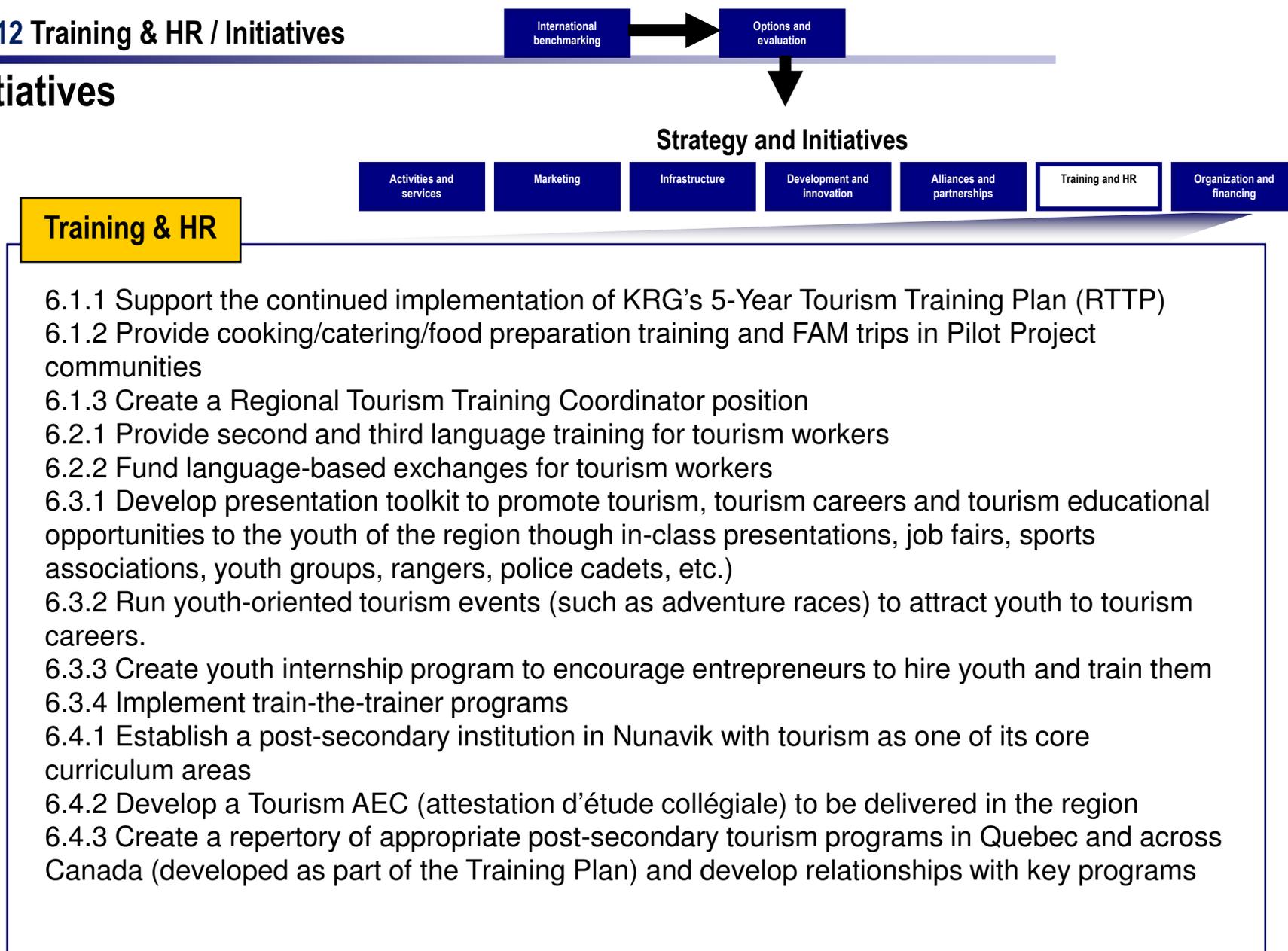
4.5.11 Training & HR / Objectives

Operational Objectives

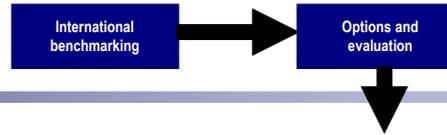


4.5.12 Training & HR / Initiatives

Initiatives



4.5.13 Organization & financing / Objectives



Operational Objectives

Strategy and Initiatives



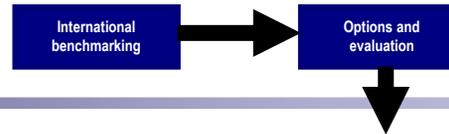
Organization & financing

With so many organizations, communities and enterprises involved in the tourism Industry, coordination and access to financing are two vital success factors for the success of the ACCORD strategy in Nunavik.

7.1 Improve overall coordination of tourism industry

7.2 Facilitate access to funding for projects that fit with the strategic focus of the Nunavik ACCORD plan

4.5.13 Organization & financing / Initiatives



Initiatives

Strategy and Initiatives



Organization & financing

- 7.1.1 Create tourism coordination team and develop an overall coordination strategy (ACCORD Director and Team)
- 7.1.2 Establish an ACCORD Steering Committee to bring together funding agencies, planners and operators
- 7.1.3 Create Local Tourism Niche Committees in hub and destination communities
- 7.1.4 Create a permanent position of Community Tourism Coordinator in each hub and destination community
- 7.2.1 Create and update a master list of funding sources, programs and successful funding requests

5.0 Abbreviations and acronyms

ACCORD	l'Action concertée de coopération régionale de développement		Makivk	Regional Investment Fund
AEC	Attestation d'étude collegial		MAPAQ	Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec
AEQ	Aventure et écotourisme Québec		MCCCF	Ministère de la Culture, des Communications et de la Condition féminine
AVATAQ	Inuit Cultural Institute		MDDEP	Ministère du Développement durable, de l'Environnement et des Parcs
CED	Canada Economic Development		MDEIE	Ministère du Développement économique, de l'Innovation et de l'Exportation
CITQ	Corporation de l'industrie touristique du Québec		MELS	Ministère de l'Éducation, du Loisir et du Sport
CTC	Canadian Tourism Commission		MESS	Ministère de l'Emploi et de la Solidarité sociale
CITQ	Corporation de l'industrie touristique du Québec		MRC	Municipalité régionale de comté
EDC	Economic Development Canada		MRNF	Ministère des Ressources naturelles et de la Faune
ETISC	Employment Training Income Security and Childcare (KRG)		MTO	Ministère du Tourisme
EQ	Emploi Québec		NTA	Nunavik Tourism Association (NTA)
FPQ	Fédération des pourvoiries du Québec		NASTC	Nunavik Arctic Survival Training Centre
FCNQ	Fédération des coopératives du Nouveau Québec		NV	Northern Village (community government)
FIER	Fonds d'intervention économique régional		SEPAQ	Société des établissements de plein air du Québec
IQ	Investissement Québec		SGF	Société générale de financement
ITHQ	Institut du tourisme et d'hôtellerie du Québec		SLSJ	Saguenay Lac-St-Jean Tourism ACCORD committee
KRG	Kativik Regional Government		SQ	Sûreté du Québec
KRPF	Kativik Regional Police Force		RTA	Regional Tourism Association
KSB	Kativik School Board		REDD	Research and Economic Development Department (KRG)
LHC	Landholding Corporation		UQAC	Université du Québec a Chicoutimi

EXECUTIVE SUMMARY for the Projet ACCORD

Building a Sustainable Tourism Industry in Nunavik:

A strategy for becoming a Centre of Excellence for Community-Based Tourism Development: 2010-2015

1. INTRODUCTION/ BACKGROUND

The Projet ACCORD (*l'Action concertée de coopération régionale de développement*) is an economic development planning process employed by the Government of Québec. It is a Québec-wide program involving cooperation between three main partners: the regional committee, the Québec government, and the *Société générale de financement*. The primary objective of the ACCORD program is to increase economic productivity and employment in a region in order to gain a more competitive position in North American and International export markets. This is done by developing industrial expertise within local economic networks through innovative ideas and projects that result in 'niches of excellence' and eventually provide leadership within the industry as a whole.

The ACCORD planning process brings together private and public sector stakeholders to form the regional committee. This committee then works together with the *Ministère du Développement économique, de l'Innovation et de l'Exportation* (MDEIE) to define a long term (10-15 yrs) vision for their industry and a short term (0-5 yrs) action plan. These efforts are documented in the ACCORD strategy, which identifies concrete development objectives and initiatives aimed at improving the support mechanisms of local business development. The ACCORD strategy then serves as a framework to facilitate negotiations with provincial and federal governments for the necessary financial support to implement the strategy, build infrastructure, and ultimately improve the economic capacity of the regional sectors to be able to successfully compete in national and international markets.

The tourism sector in Nunavik began this planning process in early 2009 with the establishment of a regional committee. The core group of regional stakeholders includes:

- the **Nunavik Tourism Association** (NTA), representing Nunavik tour operators and guides;
- **Makivik**, representing Nunavik Inuit and their subsidiary companies of First Air, Air Inuit, and Cruise North;
- the **Avataq Cultural Institute**, representing the living culture of *Nunavimmiut* through the Nunavik museum program, art collections, archaeology, genealogy, archives and Local Cultural Committees (LCCs).
- la **fédération des coopératives du Nouveau-Québec** (FCNQ), representing Co-op hotels, Voyages FCNQ travel agency, and Art Nunavik; and
- the **Kativik Regional Government** (KRG), responsible for regional tourism training, product development, industry research, and regional economic development.

Throughout the planning process it has been stressed by all stakeholders that the emerging adventure and eco-tourism industry in Nunavik be developed first and foremost for the socio-economic benefit of local communities and people. In other words, growth of the tourism industry in Nunavik should exemplify the principals of sustainable tourism development. These principals aim to maximize the positive benefits and minimize the negative aspects for the local people, culture, and environment.

Equally important to committee members is for Nunavimmiut to develop the tools and expertise locally in order to manage the growth of the tourism industry responsibly. In this way, tourism growth can be appropriately monitored as necessary to ensure continued economic benefit to local businesses, as well as to further protect natural resources and strengthen the integrity of Inuit culture and communities for present and future generations.

The need to develop tourism based on sustainability principles has been a part of the general tourism policy framework in Québec since 2005, however *“to date none of the 21 tourism regions in Québec have produced a comprehensive sustainable development strategy on a regional scale with a clearly articulated vision, set of achievable short and long-term objectives, and progress measure indicators.”*¹

Herein lies the extraordinary opportunity for Nunavik to become the first region in Québec to successfully meet this challenge and establish itself as a pioneer in creating and implementing sustainable tourism policy and development. The skills, experience, and knowledge gained by creating a successful model for community-based tourism will not only benefit local communities and people, but will also become a valuable asset in itself. With a strong vision for the industry and the successful coordination of innovative community pilot projects, Nunavik could become recognized as a centre of excellence for developing best practices in sustainable community-based tourism. Furthermore, Nunavik could eventually provide a leadership role within the tourism industry by exporting local expertise to benefit community-based tourism projects in other national or international destinations.

2. KEY OBJECTIVES AND INITIATIVES

Nunavik aims to be recognized as a Centre of Excellence for Sustainable Community-Based Tourism Development under the stated objectives of the Projet ACCORD planning process. The shared long term vision for the tourism industry reads:

“To develop a sustainable, community-based tourism industry in Nunavik as a means of empowering local communities and responsibly managing the economic growth and development of the region in a way that respects and enhances the social, cultural, economic, and ecological well-being for Nunavimmiut.”

¹ Priskin, Julianna ‘A portrait of Québec’s tourism sector in 2009 in its path towards sustainable development’, May 2009

To achieve this vision, the ACCORD strategy presents development objectives and initiatives that have been identified by the Nunavik ACCORD Tourism Niche Committee as being a top priority for growth of the tourism sector in Nunavik over the next five years. Over 85 initiatives are proposed in the ACCORD Strategy. Just a few of the initiatives are listed below, organized by the different sectors of the tourism industry.

- **ACCOMODATION**

An adequate supply of accommodation is often a strain on local resources during tourism events of any size, especially in smaller communities. The ACCORD strategy has identified the need for an Arctic Base Camp concept using high performance tent shelters. These shelters could be used for any number of applications, including as a part of a packaged tour to a remote area for wildlife viewing; accommodate cultural demonstrations near the beach during the arrival of cruise ship visitors in a community; or simply provide an adventurous location for a corporate retreat or annual conference.

- **FOOD & BEVERAGE**

Pilot projects in developing local catering businesses in Nunavik communities have proven to be very successful ventures over the past few years. One of the signature products developed through this program is frozen gourmet meals made from local caribou, char, and goose. The ACCORD has identified the need to develop a strategy for growth in this sector, and to find ways to specifically address challenges in maintaining a consistent local food supply, meeting federal food health and safety regulations, and increasing consumer access to the product through improved or new distribution chains.

- **TRANSPORTATION**

The expedition cruise industry is growing and has great potential for widespread economic benefit for Nunavik artists, performers, guides, caterers, and event organizers. Nunavik is seeing more and more cruise line companies express an interest for a short stop-over in communities, as well as add-on trips before and after the cruise. This is an opportunity for all communities in Nunavik – either as a host community where the cruise ship lands, a neighbouring community that brings local art and products to the ship, or as a tour operator taking clients from the ship to other parts of Nunavik. Other initiatives include improved marine infrastructure for cruise ships, improved airport facilities, and better organized taxi or shuttle service to and from community airports.

- **ATTRACTIONS**

With jet service, Kuujuaq and Puvirnituq will become regional gateway communities to Nunavik, and as such will become the first impression visitors have about *Nunavimmiut* culture and the region. The ACCORD strategy recognizes the importance of developing multi-use ‘Welcome Centres’ to provide basic tourism information services and fulfill the industry responsibility to market the attractions of their respective coastal regions. Welcome Centres could incorporate a retail section for souvenirs, books and regional arts and crafts; space for cultural skills demonstrations by youth and elders; a regional training center for tourism staff and guides; a museum or interpretive centre; classroom space for business skill development; or even a small café serving bannock and samples of local country foods.

- **ADVENTURE TOURISM AND RECREATION**

Pilot adventure tourism projects have been initiated in Kangiqsualujjuaq and Kangiqsujuaq over the past few years to leverage the opportunity presented by the first national parks being created near those communities. This approach has worked very well, and over the next five years under the ACCORD strategy, the number of pilot projects will continue to grow to include the two gateway communities as well as Inukjuak on the Hudson coast. At the same time, other Nunavik communities with an interest in tourism will begin the process of sustainable community-based tourism planning. As a part of this process communities will identify the best ways to get involved and benefit from this economic sector while improving local tourism infrastructure and human resource capacity.

- **EVENTS AND CONFERENCES**

Hosting major events and conferences is a relatively undeveloped opportunity in Nunavik, but represents a potential new market that could be catered to in the future. Initiatives such as the Arctic Base Camp and high quality catering and food services are two key elements to providing the infrastructure needed to serve this sector. In addition, other initiatives under the ACCORD strategy focus on standards and training programs for local community hotels to improve the quality and consistency of good customer service to better match the expectations of international business travellers.

- **TOURISM SERVICES**

Some of the most promising opportunities for economic development in the tourism sector are in fact secondary to the actual tourism activity. The Tourism Services sector includes all the businesses that support the companies that offer the tourism product. This would include accounting, insurance and legal advice; course instructors for guide skill development; training institutions for tourism and business skills; production and retail of locally developed merchandise (clothing, food, art, carvings, tea); local consultants used to develop community tourism strategies and policies; tourism research and analytics; etc. Creating a directory of services and establishing a 'one-stop-shop' concept for tourism business development services is one initiative proposed in the ACCORD Strategy aimed at supporting this sector. Furthermore, there are also a number of important initiatives that address the need for accurate statistical information and demographics to better inform decision makers in order to responsibly manage and monitor the impact of the tourism industry in Nunavik.

- **TRAVEL TRADE**

One of the most crucial elements in a successful tourism industry is a knowledgeable, resourceful, and highly competent inbound tour operator. They facilitate the link between local guides and local tour products with international tour operators and their clients. The ACCORD strategy emphasizes the need to support this position in the development of local expertise in travel logistics, itinerary and event planning, contingency planning, product packaging and pricing, marketing, selling, and skilfully networking within the tourism trade.

3. NEXT STEPS: IMPLEMENTATION

Participating in the ACCORD Program will help the region to forge new economic relationships with other jurisdictions, and provides the opportunity to be recognised as a leader in the global tourism industry. Nunavik and Nunavimmiut stand to benefit greatly from the substantial investment in community infrastructure and local human resources.

The projects identified in the ACCORD Strategy have a total estimated need of \$54Million for initial capital expenses in the first year and approximately \$11 million of recurring annual expenses during the remainder of the five year action plan.

The initial investment in developing a sustainable tourism industry in Nunavik includes infrastructure development (\$30M), product development (\$5.5M), marketing (\$2.7M), training (\$10.4M), and employing 16 new tourism professionals in various positions that serve to coordinate and implement the ACCORD strategy (\$1.8M).²

A draft ACCORD Strategy is presented here by the Nunavik ACCORD Tourism Niche Committee for internal review and comment. The document must be formally approved and supported by each of the core stakeholders, all of whom share in the responsibility of executing certain aspects of the proposed tourism development plan. Once this has been completed, the strategy must then be formally presented to and accepted by MDEIE and the Québec Government.

Upon acceptance and approval, one of the first actions of the ACCORD strategy is to hire an ACCORD director. She or he will work under the direction of the Nunavik ACCORD Tourism Niche Committee and have the primary responsibility for coordinating and overseeing the implementation of the regional five year action plan.

² Please note that all dollar amounts are approximate totals calculated from the ACCORD action plan and are meant only to indicate the relative scale of investment in each area of industry development.