



What We Learned:

Tourism Strategy Stakeholder Engagement Summary (2)

May - June 2020

Ce que nous avons appris :

Sommaire des échanges avec les intervenants à propos de la stratégie sur le tourisme (2)

mai à juin 2020

Le présent rapport contient la traduction française du sommaire.

Table of Contents



List of Figures.....	1	3.8	Are there any areas that are missing from the list above?.....	30
Executive Summary.....	2	3.9	If you could tell the GNWT ITI to take action on one or two things as part of its next five year strategy for tourism, what would it be?.....	32
Sommaire.....	4	3.10	Is there anything else that you would like to share? ..	34
Acronyms.....	6	4.0	Next Steps.....	37
1.0 Introduction.....	7	5.0	Contact.....	38
2.0 Stakeholder Engagement Approach.....	8	Appendices.....		39
2.1 Engagement Methods.....	8	Appendix A: Interview Questions.....		40
2.1.1 Interviews.....	8	Appendix B: Online Survey Questions.....		43
2.1.2 Online Survey.....	8	List of Figures		
2.1.3 Participant Demographics.....	9	Figure 1: Region of Operation.....		9
3.0 What We Learned.....	12	Figure 2: Operator Status (licensed or not).....		9
3.1 In the short-term (next 12 months), what do you think are the most pressing issues that the NWT tourism industry will face?.....	12	Figure 3: Primary Area Products/Services Offered.....		10
3.2 Thinking about the next 5 years (long-term), what do you think are the most pressing issues that the NWT tourism industry will face?.....	14	Figure 4: Sector of Operation.....		11
3.3 Now, let's assume that COVID-19 is behind us; a vaccine has been introduced and tourism is back on track. What do you see as the greatest tourism development opportunities for the NWT?.....	17	Figure 5: Short-term Pressing Issues.....		13
3.4 Once the COVID-19 pandemic is over, recovery can begin for the tourism industry. What does recovery look like for you?.....	20	Figure 6: Long-term Pressing Issues.....		16
3.5 What areas do you think ITI should focus on to help the tourism industry recover on the NWT in the next five years?.....	22	Figure 7: Recovery looks like.....		21
3.6 Which three areas do you think will be most effective at rebuilding the tourism industry in the NWT?.....	24	Figure 8: Priority Areas in the next 5 Years.....		23
3.7 For the next five-year tourism strategy, there are several areas that are being explored.....	25	Figure 9: Most Effective Areas for Rebuilding the NWT Tourism Industry.....		24
3.7.1 Investing in infrastructure.....	26	Figure 10: Investing in Infrastructure – Level of Importance		26
3.7.2 Investing in product development.....	26	Figure 11: Investing in Product Development – Level of Importance.....		26
3.7.3 Supporting more tourism development outside of Yellowknife.....	27	Figure 12: Supporting More Tourism Development outside of Yellowknife – Level of Importance.....		27
3.7.4 Building knowledge and skills among the workforce through training and mentorship.....	27	Figure 13: Building Knowledge and Skills among the Workforce through Training and Mentorship – Level of Importance.....		27
3.7.5 Engaging with operators and park visitors through enhanced communications and marketing activities.....	28	Figure 14: Engaging with Operators and Park Visitors through enhanced communications and marketing activities – Level of Importance.....		28
3.7.6 Communicating with community residents to gain more support for tourism in the NWT.....	28	Figure 15: Communicating with community residents to gain more support for tourism in the NWT.....		28
3.7.7 Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry.....	29	Figure 16: Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry.....		29
		Figure 17: Other Areas of Importance.....		31

Executive Summary

The Department of Industry, Tourism and Investment (ITI) is developing a five-year tourism strategy. The strategy will serve as a roadmap to guide tourism activities and investments by the Government of the Northwest Territories (GNWT) from 2021 to 2025.

In the fall of 2019, ITI hired a contractor to conduct an extensive engagement with tourism operators and stakeholders; and to identify government actions and investments that would empower the NWT's industry to build and expand upon its success into the future.

By May 2020, however, the global COVID-19 pandemic had abruptly altered the course of domestic and international tourism.

With less than a year to go until the release of its 2021-25 tourism strategy, and with a sudden and necessary new focus on recovery, ITI once again engaged key tourism businesses and partners with a new set of questions assessing needs and priorities; and identifying opportunities for short and long term rebuilding.

This What We Learned: Tourism Strategy Stakeholder Engagement Summary (2) presents the information gathered from this second round of interviews and surveys with tourism partner organizations, tourism funding partners, municipalities and licensed tourism operators.

What We Learned

In the immediate term, COVID-19-influenced travel restrictions and self-isolation requirements were considered to be the most pressing issues faced by the NWT tourism industry.

When asked to look forward five years, individuals highlighted the need to re-establish the international market by building consumer confidence and peace of mind that it is safe to travel in the NWT in the wake of the COVID-19 pandemic.

When asked to define recovery, participants spoke about realizing the return of domestic and international travellers and getting tourism back to where it was before the impacts of the pandemic were felt.

While the tourism industry in the NWT will be challenged by world-wide competition and higher travel costs, almost all tourism representatives noted Indigenous cultural tourism as a distinct competitive edge for the NWT. Many of the participants identified a strong focus on marketing as essential for recovery.

When asked: What areas do you think ITI should focus on to help the tourism industry recover on the NWT in the next five years? Participants said:

- creating more Indigenous products and services
- more marketing campaigns and
- helping businesses to develop new products and services



When asked: Which areas would be most effective at rebuilding the tourism industry in the NWT?

Participants said:

- Marketing campaigns
- Investment programs such as grants
- Creating more Indigenous tourism products and helping businesses to develop new products or services; and
- Building tourism infrastructure.

As ITI moves to develop its next five-year tourism strategy, it is exploring a number of proven areas of investment.

As a final point of discussion, all those participating in this second round of engagement were asked to rate the importance of the following areas:

- Investing in infrastructure
- Investing in product development
- Supporting more tourism development outside of Yellowknife
- Building knowledge and skills among the workforce through training and mentorship
- Engaging with operators and park visitors through enhanced communications and marketing activities
- Communicating with community residents to gain more support for tourism in the NWT; and
- Providing more research and data to stakeholders to support data-driven investments and decisions in the industry.

The top four areas of importance were ranked, in descending order, as:

- Communicating with community residents to gain more support for tourism in the NWT
- Investing in product development
- Providing more research and data to stakeholders to support data-driven investments and decisions in the industry
- Engaging with operators and park visitors through enhanced communications and marketing activities

This feedback gathered from stakeholders will be reviewed alongside information sourced from previous stakeholder engagements, reviews of national and international approaches and an evaluation of outcomes from the GNWT's Tourism 2020 strategy.

Together they will inform a series of goals and actions designed to strengthen the tourism industry in the NWT as it recovers from the devastating impacts of the COVID-19 pandemic and moves forward to 2025.

Sommaire

Le ministère de l'Industrie, du Tourisme et de l'Investissement (MITI) élabore actuellement une stratégie touristique sur cinq ans. La stratégie servira de feuille de route pour orienter les activités et les investissements touristiques du gouvernement des Territoires du Nord-Ouest (GTNO) de 2021 à 2025.

À l'automne 2019, le MITI a embauché un entrepreneur pour mener des consultations exhaustives auprès des exploitants d'entreprises touristiques et d'autres intervenants, et pour déterminer les mesures et les investissements du gouvernement qui permettraient au secteur touristique des TNO de consolider ses acquis et de croître.

Toutefois, l'arrivée en début d'année 2020 de la pandémie de COVID-19 a grandement perturbé le tourisme national et international.

Étant donné qu'il reste moins d'un an avant la publication de la stratégie touristique et qu'il est plus que jamais nécessaire de se concentrer sur la relance du secteur, le MITI a consulté à nouveau les principaux exploitants d'entreprises touristiques et ses partenaires au moyen d'une série de questions visant à déterminer leurs principaux besoins et leurs priorités, ainsi que les occasions à saisir à court et à long terme pour rebâtir le secteur.

Le document *Ce que nous avons appris : Sommaire des échanges avec les intervenants à propos de la stratégie sur le tourisme (2)* présente l'information recueillie lors de cette deuxième ronde d'entrevues et de sondages réalisés auprès des organismes

touristiques partenaires, des partenaires de financement du tourisme, des municipalités et des exploitants d'entreprises touristiques.

Ce que nous avons appris

Dans l'immédiat, les restrictions concernant les déplacements et les directives d'auto-isolement liées à la COVID-19 sont considérées comme les problèmes les plus urgents du secteur touristique des TNO.

Lorsqu'on leur a demandé de se projeter cinq ans plus tard, les répondants ont souligné la nécessité de réinvestir le marché international en restaurant la confiance des voyageurs et en leur assurant qu'il sera sécuritaire de voyager aux TNO une fois la pandémie de COVID-19 terminée.

Lorsqu'on leur a demandé de définir la reprise, les participants ont mentionné le retour des voyageurs nationaux et internationaux et le retour du tourisme au point où il était avant la pandémie.

Bien que l'industrie touristique des TNO doive composer avec la concurrence mondiale et le coût élevé du transport, presque tous les représentants du secteur ont mentionné le tourisme culturel autochtone comme un avantage concurrentiel pour les TNO. De nombreux participants ont souligné qu'il faudra investir massivement dans le marketing pour favoriser la reprise des activités.

À la question : Selon vous, que doit faire le MITI pour contribuer au rétablissement de l'industrie touristique des TNO au cours des cinq prochaines années? Les participants ont répondu :

- Créer plus de produits et services autochtones
- Diffuser davantage de campagnes de marketing
- Aider les entreprises à développer de nouveaux produits et services



À la question : Quelles mesures seraient les plus efficaces pour rebâtir l'industrie touristique des TNO? Les participants ont répondu :

- Campagnes de marketing
- Programmes d'investissement, comme des subventions
- Création de nouveaux produits touristiques autochtones et aide aux entreprises pour développer de nouveaux produits et services
- Construction d'infrastructures touristiques

Alors que le MITI élabore sa stratégie touristique sur cinq ans, nous explorons certains mécanismes d'investissement éprouvés.

Finalement, nous avons demandé à tous les participants de cette deuxième ronde de consultations de classer les mesures suivantes par ordre d'importance :

- Investir dans les infrastructures
- Investir dans le développement de produits
- Soutenir davantage le développement touristique à l'extérieur de Yellowknife
- Développer les connaissances et les compétences de la main-d'œuvre grâce à la formation et au mentorat
- Consulter davantage les exploitants et les visiteurs des parcs par l'entremise de communications et d'activités de marketing accrues
- Communiquer avec les résidents des collectivités afin qu'ils soutiennent davantage le tourisme
- Offrir davantage d'études et de données aux intervenants afin de favoriser les investissements et les décisions fondés sur des données probantes au sein du secteur

Voici les quatre réponses les plus populaires, en ordre décroissant :

- Communiquer avec les résidents des collectivités afin qu'ils soutiennent davantage le tourisme
- Investir dans le développement de produits
- Offrir davantage d'études et de données aux intervenants afin de favoriser les investissements et les décisions fondés sur des données probantes au sein du secteur
- Consulter davantage les exploitants et les visiteurs des parcs par l'entremise de communications et d'activités de marketing accrues

Les commentaires des intervenants seront analysés avec l'information recueillie lors des consultations précédentes, les examens des approches nationales et internationales et l'évaluation des résultats de la stratégie touristique 2020 du GTNO.

Ces données permettront d'établir une série d'objectifs et de mesures conçus pour renforcer le secteur touristique des TNO, favoriser son rétablissement à la suite des répercussions dévastatrices de la pandémie de COVID-19, et pour le faire progresser jusqu'en 2025.

Acronyms

CanNor	Canadian Northern Economic Development Agency
CDETNO	Conseil de développement économique des Territoires du Nord-Ouest
DMO	Destination Marketing Organization
ECE	Department of Education, Culture and Employment
GNWT	Government of the Northwest Territories
HSS	Department of Health and Social Services
ITAC	Indigenous Tourism Association of Canada
ITI	Department of Industry, Tourism and Investment
MACA	Department of Municipal and Community Affairs
NWT	Northwest Territories
NWTT	Northwest Territories Tourism
YKDFN	Yellowknives Dene First Nation





1.0 Introduction

The Tourism and Parks Division of the Department of Industry, Tourism and Investment (ITI) is developing a five-year tourism strategy. The strategy will identify goals and actions to strengthen the tourism industry as it recovers from the devastating impacts of the COVID-19 pandemic. It will serve as a roadmap to guide tourism investments by the Government of the Northwest Territories (GNWT) from 2021 to 2025.

In the fall of 2019, ITI hired a contractor to conduct an extensive engagement with tourism operators and stakeholders to learn about the priorities and insights from the industry. In light of the pandemic and the resulting social and economic impacts, the tourism landscape has changed significantly. In order to gather information that will inform the recovery and the development of tourism in the next five years, ITI with the support of the contractor, engaged again with key tourism businesses and partners from across the Territory in May and June 2020 to hear their thoughts and ideas on tourism issues, priorities, recovery efforts, and opportunities for both the short- and long-term.

The What We Learned: Tourism Strategy Stakeholder Engagement Summary (2) presents information gathered from: (1) interviews with tourism partner organizations, tourism funding partners, municipalities, and licensed tourism operators (18 interview participants (two interviews had two participants at once); 16 interviews conducted; response rate (19/23, 78.3%), and completion rate (16/23, 70.0%); and, (2) responses from Northwest Territories Tourism (NWTT) members and licensed tourism operators to an online survey (41 survey responses; response rate (115/(172+146), 36.2%); and completion rate 41/115 surveys).

The findings of the stakeholder engagements, including the contents of this Summary document will be used to help inform and guide the development of the next tourism strategy.

2.0 Stakeholder Engagement Approach

2.1 Engagement Methods

Two methods of engagement were employed – interviews and an online survey.

2.1.1 Interviews

Telephone interviews were conducted with municipalities, tourism partner organizations, tourism funding partners, and licensed tourism operators:

- Municipalities
 - City of Yellowknife (1)
 - Town of Inuvik (1)
- Tourism Partner Organizations
 - NWT Tourism (NWTT) (2)
 - NWT Chamber of Commerce (1)
 - Conseil de développement économique des Territoires du Nord-Ouest (CDETNO) (2)
- Tourism Funding Partners
 - Indigenous Tourism Association of Canada (ITAC) (1)
 - Canadian Northern Economic Development Agency (CanNor) (2)
- Licensed Tourism Operators (6)

In total, 18 individuals were interviewed. The interviews were carried out by telephone and ranged in length from 20 to 60 minutes. All interview participants were asked to respond to the same question set (refer to Appendix A – Interview Questions), which included both closed- and open-ended questions. Interviews took place the weeks of May 18 to June 1, 2020.

2.1.2 Online Survey

A web-based public engagement platform (EngageITI), hosted by ITI, was used to solicit opinions via an online survey. Members of NWTT and licensed tourism operators were invited, via an email invitation letter, to take part in the online survey. Two reminder emails were sent to encourage participation. The survey included both closed- and open-ended questions (refer to Appendix B – Online Survey). The survey was open from June 1 to 14, 2020. A total of 41 invited respondents participated in the survey.



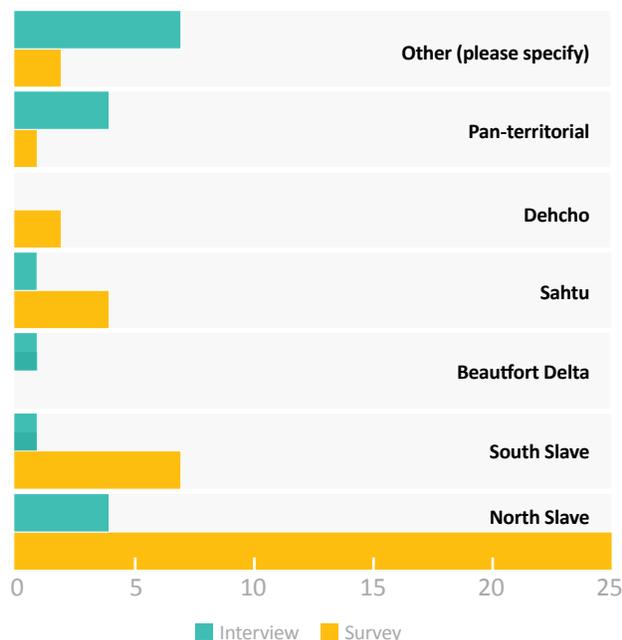
2.1.3 Participant Demographics

Region of Operation

Figure 1 presents the breakdown of the 18 participants by region of operation. While just over 22% of participants operate in the North Slave (4) or pan-territorially (4), 38.9% (7) selected 'other', stating they operate in more than one region but not all regions: (North and South Slave (2); Sahtu and Dehcho; Beaufort Delta and Sahtu (2); North Slave, South Slave, Beaufort Delta, Sahtu and Dehcho; and North Slave, South Slave, Sahtu and Dehcho).

Figure 1 shows that the majority of survey respondents are from the North Slave (25; 61%), followed by the South Slave (7; 17.1%) and Sahtu (4; 9.8%) regions. Two survey respondents selected 'other' and noted they operate in Yellowknife and western Victoria Island (Ulukhaktok) and nearshore waters of Beaufort Sea.

Figure 1: Region of Operation

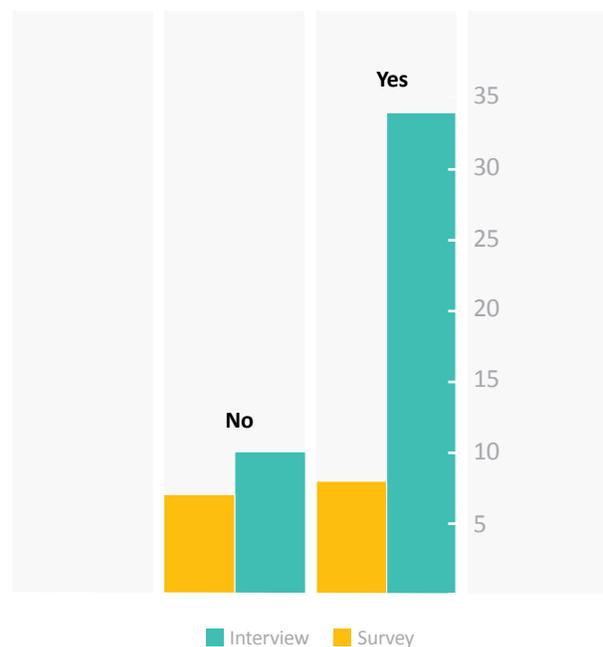


¹ Some interview participants indicated that they offer products and services in more than one area so the total number of responses is 21.

Licensed Tourism Operator Status

Figure 2 reveals that the majority of interview participants are not licensed tourism operators (10; 55%) and the majority of survey respondents are licensed operators (34; 83%).

Figure 2: Operator Status (licensed or not)



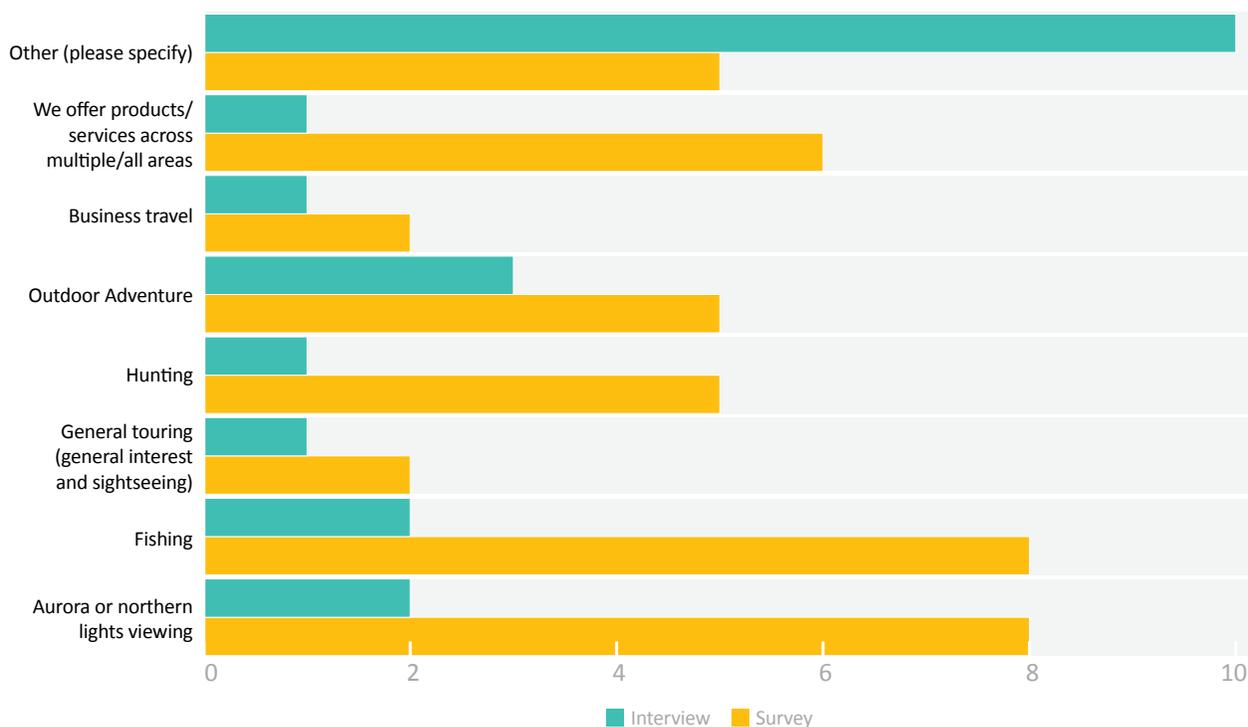
Primary area products/services are offered

Figure 3 presents information on the primary area that products and services are offered. Most interview participants (10; 47.6%)¹ identified 'other' areas as their response. 'Other' included: museum/gift shop; culture and heritage; Indigenous culture; visitor services; translation/promotion; funding; government; advocacy/communications; and destination marketing for all products and services.

For survey respondents, the primary areas in which products and services are offered include fishing (8; 19.5%) and Aurora or northern lights viewing (8; 19.5%).

'Other' areas (10; 24.4%) included: visitor information centre (VIC); retail; commercial and advertising photography services to operators; media and government; produce colour photo books of interest to visitors and residents; Aurora tour guiding; expedition cruising; and, support to the tourism community for their operations.

Figure 3: Primary Area Products/Services Offered



Sector of Operations

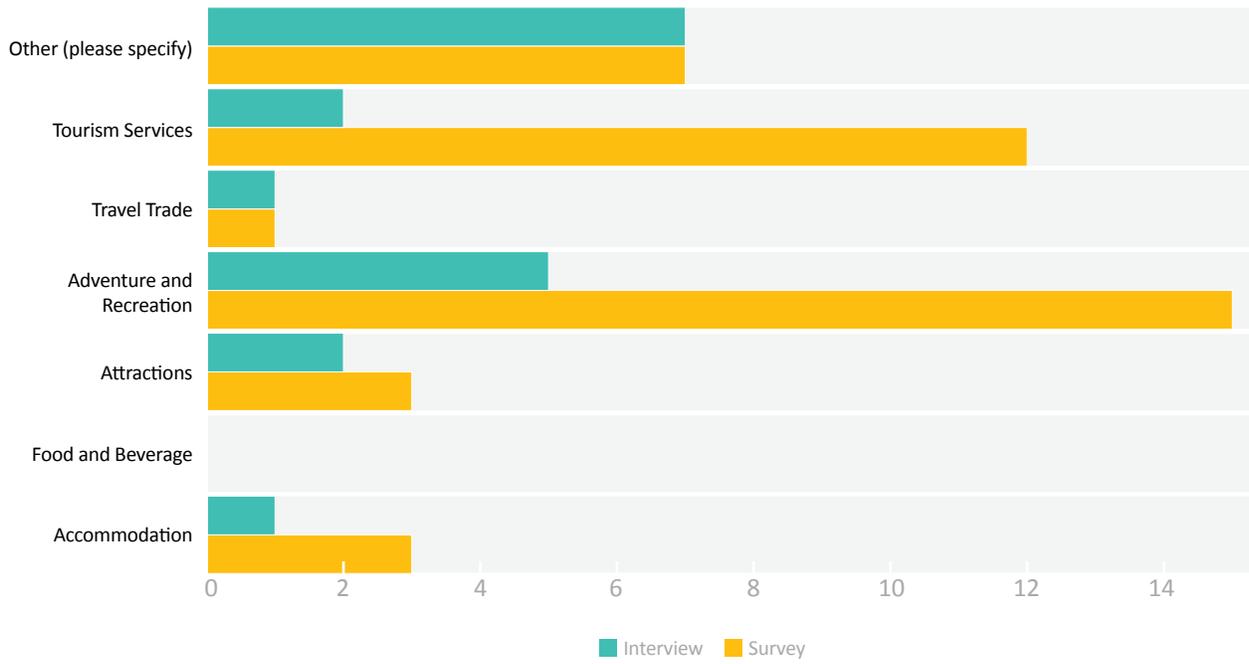
Figure 4 presents information on the sector of operation. Most interview participants indicated that they operate in 'other' areas (7; 38.9%). In this case, 'other' meant that they represented all tourism sectors in the areas of funding, translation/promotion, advocacy/communications, and/or destination marketing.

For survey respondents, the main areas of operation are adventure and recreation (13; 31.7%) and tourism services (12; 29.3%). 'Other' survey responses (7; 17.1%) included: we promote all of these sectors through the VIC; retail; accommodation, food and beverage, adventure, attractions, transportation; outfitting; if tourism services covers tour provider than that is our selection; business support; and, trophy fishing packages, Aurora viewing, and photography.

¹ Some interview participants indicated that they offer products and services in more than one area so the total number of responses is 21.



Figure 4: Sector of Operation



3.0

What We Learned

This section of the Summary presents what we learned from the engagement activities. The information is presented by question, and by data collection method – interviews and survey – when applicable.

3.1

In the short-term (next 12 months), what do you think are the most pressing issues that the NWT tourism industry will face?

Interviews

Interview participants identified a variety of important issues they feel the NWT will face in the short-term. The most common issue mentioned was travel restrictions due to the COVID-19 pandemic and the subsequent self-isolation requirements. With continued border and traveller restrictions, there will be limited domestic or international visitors and nominal tourism dollars flowing into the territory. With the travel restrictions in place, participants also expressed concern that many small tourism operators will go out of business or experience serious financial

instability in the next 12 months. Interviewees commented that the border restrictions will allow the territory's competitors (e.g., Iceland, Scandinavian countries) to take over the market share [of Aurora viewing] permanently ("we will never win those people back"). It was also noted that even if tourists can be encouraged to visit, there may not be enough products and services available for them to take part in because there will be a limited number of operators providing tourism experiences.

Participants expressed concern about the affordability of air travel – "If we can't compete cost wise, we won't be able to get the tourist" and about the availability of commercial flights – "If they aren't offering flights, it effects the trip roll-out and duration. If there are flight cancellations, it means there will be more days lost of the trip". Interviewees also mentioned that because the cost of delivering tourism products and services is already higher in the NWT than other destinations, and because people might be more price conscious as a result of the pandemic, it may be harder to sell them on the idea of visiting the territory.

Moving forward, since it is likely that international travel (especially of Asian tourists) will be limited in the short-term, interview participants spoke about the need to focus on building both the local and domestic market through incentives (e.g., accommodation coupons) and promoting staycations. They also spoke about the importance



of developing new safety protocols and training operators on how to implement and meet the new safety requirements. Additionally, participants commented on the need to get new tourism employees trained. One participant noted that “[I] had to lay-off employees who have found other jobs so now need to start fresh with new people and train them. There are going to be new safety protocols that we will all need to trained on.” Another participant stated that businesses are “going to lose staff because they can’t afford to keep them and it will take a while to get skilled people trained when things do open up”. In other words, businesses will need to be able to increase operations and build capacity in preparation for when the industry is up and running.

Participants also identified the following areas that will need to be addressed in the short term:

- providing financial support to keep businesses solvent
- ensuring NWT residents are ready and willing to welcome tourists post-COVID-19
- conducting research to ensure that the GNWT, Destination Canada and NWT Tourism are targeting the right market(s) for the NWT

Survey

Figure 5 highlights the most pressing short-term issues identified by survey respondents. The most important issues are considered to be: border closure, travel restrictions and self-isolation requirements (40; 37.7%), going out of business and experiencing financial problems (25; 23.6%), and being able to ramp back up, increase operations and build capacity (18; 17.0%).

Figure 5: Short-term Pressing Issues (Choose your top 3)



When asked if there are other short-term pressing issues that the NWT will face, the survey respondents noted the need:

- for immediate marketing to re-establish the territory’s previously strong markets (e.g., Asia)
- to ensure that reliable and affordable commercial air service is in place
- to promote staycations in an effort to build local tourism while the borders remain closed
- to focus on tourism opportunities for communities and operators outside of Yellowknife
- to increase access to government lands for the purpose of tourism activities (e.g., Aurora viewing)
- to address the issues of unlicensed operators and the unauthorized use of the land (no lease, permits, etc.)

Respondents also reiterated the need for the development and implementation of COVID-19 safety protocols/strategies.

3.2

Thinking about the next five years (long-term), what do you think are the most pressing issues that the NWT tourism industry will face?

Interviews

A number of participants commented that rebuilding the tourism industry in the NWT will be a long-term process as there are a variety of issues that will need to be addressed.

Interviewees spoke about the need to focus on re-establishing the international market by building consumer confidence and peace of mind that it is safe to travel in the NWT in the wake of the COVID-19 pandemic. To do this, operators with the support of the GNWT, will need to know how to carry out events safely and how to manage people's discomfort when attending inside events and when being around people they do not know. One participant noted that given the weak Canadian dollar, the NWT may want to focus specifically on building the American market because it will be inexpensive for them to visit. Participants also mentioned the need to focus on building the domestic market because the NWT will not be able to attract international travellers right away.

To re-establish existing markets and build new markets, participants indicated that the NWT will need to follow the lead of other jurisdictions that are substantially increasing their tourism budgets in an effort to regain the tourism market share both internationally and nationally.

Participants commented on the need to address market competition. As one interviewee stated, "The industry is going to face a huge amount of competition because everyone is going to be vying for visitors and tourists, so we are going to [have to] be competitive (ease of travel, costs, experiences)". Another stated that, "When you are closed for a year or more and other jurisdictions are not, then people go to where something is open so it is keeping the name of NWT up there to ensure that when it is open, people want to go there." It was suggested that NWT Tourism strengthen the brand of the NWT so that the territory can better compete with other provinces and territories.

Interviewees also spoke about the need to manage the costs of travelling to the NWT and to support airlines to continue their services. As one participant stated, "it will be hard to compete with the global market when everyone else is going to also be repacking their products and trying to offer discounts to get people coming to their places. Cruise ships are going to be hard to compete with when they are offering big discounts to get people on board." With respect to flights, interviewees spoke about the fact that airlines have reduced the number of flights so it may be difficult to get people into the NWT. One participant noted that, "it was hard to get air transportation to Yellowknife in the first place". Another issue that will need to be addressed is keeping charter air companies in business. As one participant stated, "if the charter air companies go down, that is our lifeline. No other way of getting tourists to and from the lodge, so if they go down, we go down".





Participants noted that conducting research will be critical to rebuilding/rebooting the industry. There is a need to understand how to reach new tourists groups and how best to target those groups (e.g., Francophone Canadians). There was a call for “sound, robust and timely data collection”, that is conducted uniformly across the NWT, on travel trends, resident sentiment, who is visiting and from where. This was considered important because it may be that the market has changed, and that pre-COVID-19 products and services are not the same as what tourists want, post-COVID-19.

Product and service diversification is another issue that needs to be tackled. One participant suggested that the industry look at the products and services left behind and determine how fast things can be built back up, because, “if there are gaps in accommodation, restaurants and tourism experiences that means a decrease in tourism products in the NWT and even less reason to go into the regions.” One participant commented that the shortage of market-ready Indigenous tourism products and services is an issue that will need to be addressed if the NWT hopes to meet the growing demand in the long-term. It was also noted that eco-tourism should be marketed more widely in the NWT especially since the federal government is putting an emphasis on being closer to nature and being environmentally concerned. One interviewee highlighted the need to offer a wider selection of products and services across the entire territory that will appeal to a more diverse base of tourists. That being said, it was noted that thought will need to go into how products and services are

provided. For example, “... a lot of tourism packages require small groups of people being together (canoe trips) in lodges where everything is shared. It’s a very communal style and very social, so wonder if in the next 5 years with social distancing being encouraged, the communal style will need to be looked at.”

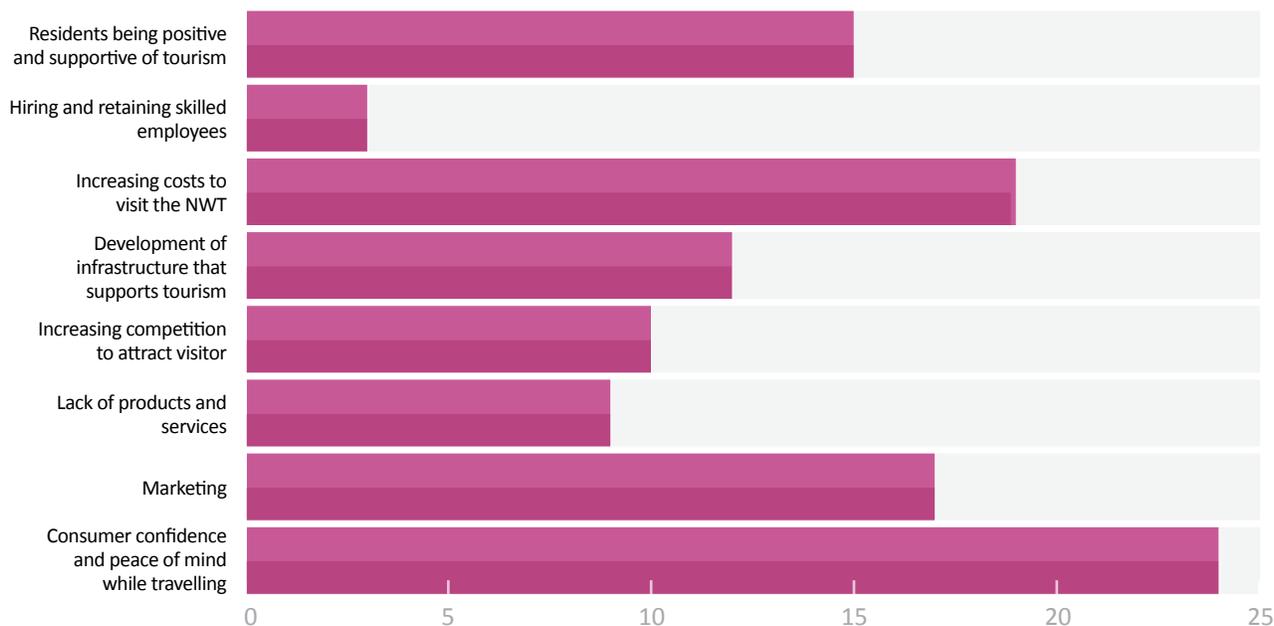
Other issues the NWT will face long-term include:

- The need to focus on hiring, training and retaining new staff in order to build up the capacity of the industry once again.
- The need to address the attitude of northerners towards tourism. Resident sentiment toward tourism will be a challenge – will residents want tourists to visit and will they feel safe having them in the NWT?
- The need to invest in infrastructure that supports tourism. Specific infrastructure development included improved road access, and an international airport in Yellowknife to give us a more level playing field with our competitors.

Survey

Figure 6 highlights the most pressing long-term issues identified by survey respondents. The most important issues are considered to be: consumer confidence and peace of mind while travelling (24; 22.0%), increasing costs to visit the NWT (19; 17.4%), marketing (17; 15.6%), and residents being positive and supportive of tourism (15; 13.8%).

Figure 6: Long-term Pressing Issues (choose your top 3)



When asked if there are other long-term pressing issues that the NWT will face, the survey respondents noted the need:

- to ensure that tourism in the NWT is cost competitive (e.g., airfare)
- redeveloping lost tourism businesses
- to ensure that sufficient levels of infrastructure and support services (e.g., hotels, attractions, airlines) are in place to satisfy visitors
- to ensure that financial supports are in place for licensed operators so that they can compete with non-licensed operators who are able to provide products and services at a lower rate
- to focus on tourism opportunities for communities and operators outside of Yellowknife
- to address the disconnect between regulations and the actual reality of tourism operators
- to review air travel availability into and around the NWT (without jet travel into all regions, only Yellowknife will benefit)
- to conduct research to see how other jurisdictions (e.g., Yukon) are building infrastructure (e.g., VIC) and promoting attractions, adventures and events
- to deliver safe, quality products
- to increase access to government lands for the purpose of tourism activities (e.g., Aurora viewing)
- to address the issues of unlicensed operators and the unauthorized use of the land (no lease, permits, etc.)



3.3

Now, let's assume that COVID-19 is behind us; a vaccine has been introduced and tourism is back on track. What do you see as the greatest tourism development opportunities for the NWT?

Interviews

The greatest tourism development opportunity identified by interview participants involve product and service diversification and marketing of these experiences with a specific focus on Indigenous/cultural tourism and ecotourism and outdoor/wilderness adventure:

- **Indigenous/cultural tourism**

- Interviewees noted that many Canadian and international tourists are interested in Indigenous peoples, reconciliation, history and heritage. There is a lot of opportunity to grow this area in the NWT because of the many Indigenous cultures, cultural practices (drumming and dancing), traditions, artefacts and arts and crafts. To support this, there is a need to work with Indigenous licensed operators and ITAC, so that Indigenous products and experiences can be developed in each of the five regions.

- One participant stated that, "Our country is starting to wake up to the history of Indigenous people and something the people living in the North have lived their whole lives. Seen a lot of the breakdown of culture and the ties to the land and really respect the Indigenous culture. As an airline, see a lot of connection of the youth getting involved. Indigenous tourism is just starting to get traction and a lot of people from the South don't have this knowledge or awareness, so this is an opportunity. Amazing industry development in BC. There are a few tourism operators that are building this up in the Territory. This should be moving forward more and building on it."
- It was stated that currently Indigenous and cultural tourism is undervalued and undermarketed in the NWT and as such, there are a shortage of market-ready products.

- **Ecotourism and outdoor/wilderness adventure**

- A number of participants commented that there may be great appeal for ecotourism because there is an isolation factor. As one interviewee stated, "Rely on the great wide open. There will likely be fear of crowded spaces so leverage that for the North with the wide-open space that they can offer. NWT has low numbers and can show that it is a safe place in every which way and that there is enough to see and do there that doesn't include being in close proximity with others, so create a great outdoors package... Tourism has always been about the outdoors, so that could be a great thing to exploit." Another participant stated that, "NWT can sell people a destination to nowhere with social distancing in nature. See things that no one else has ever seen. You can set foot where no others have ever been and it will also be eco-friendly. Social distancing is going to be here

for a while. So if they can develop a product that builds on that, it can use humour. 'Come see us - we are naturally so big, it's naturally socially distanced'."

- As was noted, the NWT currently offers ecotourism activities – bike, hike, canoe and kayak trips. However, there are a lot of people who would be interested in this all year round. The NWT could offer all season ecotourism trips if it had more cabins that would support cross-country ski trips – “we need to make ecotourism easier and more available”.
 - Fishing and hunting were two areas that interviewees feel there is still great opportunities for tourism development.
 - **Other products and services included:**
 - **Destination events**
 - There is a need to build up existing destination events such as Folks on the Rocks and Great Northern Arts Festival as a way to draw more tourists. It was noted that if these events are expanded, there will be a need for more infrastructure (e.g., hotels, RV sites) to house the visitors.
 - **Inuvik to Tuktoyaktuk Highway**
 - The Western Arctic saw 3000 visitors in one summer even though the Tuk highway was built with few tourism products and services to support it as a tourism site. There is an opportunity to develop new products and services to anchor the road.
 - **Recreation vehicles (RV)**
 - There is a need to attract more RVers to the NWT. There are RVers who travel in the Yukon but when they get to the NWT border, they do not go beyond it because there are no RV supports or tourism products and services in place to attract them. Having the Inuvialuit and Gwich'in provide cultural showcases (arts, crafts, etc.) would help draw tourists.
 - **Mining history (North Slave)**
 - There are opportunities to showcase Rio Tinto and the Giant Mine Reclamation Project (look at the opportunity to tell a story about mining – showcase the clean-up process - compare historic versus contemporary approaches to mining in the NWT – collaborate with the federal government to tell the story)
 - **Package tours**
 - There is a need to target more high-yield tourism opportunities, ones in which people come for a couple weeks and put money into the small communities through the grocery stores and the float plane companies and the outfitters for rentals. Interviewees noted that this type of tourism has a greater impact on the communities and money is re-invested in them while providing a lower carbon footprint than bus trips to see the Aurora.
 - **Offering more activities in Yellowknife**
 - Waterfront development in Yellowknife that supports the growth of tourism in the city
 - Aurora viewing in other communities than Yellowknife (e.g., Norman Wells, etc.)
 - Culinary strategy with products in all five regions that includes cooking lessons and meals with local products
- Other opportunities for tourism development identified by interview participants include:
- **Creating infrastructure that will help to anchor the tourism products and services.**
 - Operators need a platform/critical space from which they can offer their products and services without a huge outlay of money. The space would be multi-use and act as the epicentre, especially for communities that



don't have anything like that. The platform would look different in every community - cultural centre, VIC, park, etc. For example, a VIC would allow the Yellowknives Dene First Nation (YKDFN) to showcase their arts and crafts. Such a platform would require a partnership between the GNWT, City of Yellowknife and the YKDFN. Such an anchor would also provide information on tourism activities available across the territory.

- Attracting tourists through the use of incentives.
 - The NWT needs to offer incentives to help attract tourists and business travels to visit the NWT to take part in events and meetings (e.g., coupons for flights and hotels). Iceland already has coupons in place to attract tourists to come and see the Aurora.
- Making tourism products and services more affordable and accessible to residents and non-residents
- Working with Aurora College to support the development and implementation of tourism programs and research programs that focus on Aurora (the science of Aurora)

Survey

While surveys respondents identified a wide variety of tourism development opportunities, a large number focused on the importance of marketing. In particular they commented on the need for:

- equitable marketing of all regions (not just Yellowknife) and all products and services (not just Aurora but also fishing, canoeing, camping, birding, etc.)
- increased marketing efforts for existing products and services
- marketing that focuses on outdoor adventure and activities to promote the territory's natural assets that are free from crowds and COVID-19 risks ("NWT has the nature few other places can offer")

- enhanced marketing of NWT unique products (e.g., Indigenous arts and crafts, geology and mining heritage, northern cuisine, and local festivals)
- increased marketing to domestic tourists since many Canadians will not be comfortable travelling internationally

Other tourism development opportunities mentioned by survey respondents include:

- developing new products and services that address market demand (e.g., culinary tourism)
- developing more infrastructure (e.g., lodges, unique accommodation options, VIC) to support tourism activities
- making commercial land available to tour operators (e.g., road pull-offs (too many people are in the highway and the side of the road viewing aurora and this creates dangerous situations for both clients and staff - someone is going to get run over someday.)
- Creating partnerships that allow for the delivery of package tours

Respondents also spoke about opportunities for GNWT to work with municipal governments and northern-based and/or Indigenous operators/service providers to assist in the growth of the regionally unique attractions, adventures and events.

Some respondents feel that there are no business development opportunities and that the NWT tourism industry will be unable to recover.

3.4

Once the COVID-19 pandemic is over, recovery can begin for the tourism industry. What does recovery look like for you?

Interviews

When interview participants were asked what recovery in the tourism industry looks like post-COVID-19, a wide variety of ideas were put forth. For many of the participants, a strong focus on marketing was essential for recovery. This would include more marketing campaigns, more strategic marketing, more long-term marketing initiatives, and more marketing dollars. Interviewees noted that while it is still important to focus on re-attracting international tourists, the emphasis should be on marketing efforts aimed at local and domestic clients (i.e., concentrate marketing efforts at home). They spoke about emphasizing staycations but recognized this may be a challenge given that Aurora viewing is not a draw and that tourism activities in the NWT cost more than most NWT residents are willing to spend. With respect to marketing to domestic tourists, participants also acknowledged that airline and NWT tourism product costs (e.g., flights are expensive and expected to increase, a paddling trip in the NWT is thousands of dollars) may be a barrier to attracting Canadians.

For other participants, recovery looks like:

- getting tourism back to what it was before the COVID-19 pandemic
- helping businesses diversify or enhance their product/service offering through investments and other supports
 - focus on creating more Indigenous tourism products
 - focus on developing products that are market-ready
- creating new partnerships that support domestic travel and NWT resident travel in the territory
- figuring out how to manage visitor expectations and providing experiences that meet expectations
- understanding each community's readiness to bring tourists back
- having the GNWT support operators with the implementation of new tools and supports (supplies, standards, protocols)
- building infrastructure
- providing investment such as grants
- offering training supports (funding, programs, materials, etc.)
- offering business mentorship programs
- attracting business meetings and conferences to be held in the NWT
- marketing the NWT Parks
- offering incentives for travel
- carrying out robust research and disseminating the results
 - need geographic and demographic data quarterly so that we can adjust the marketing as needed and project into the future
- implementing funding criteria and accountability



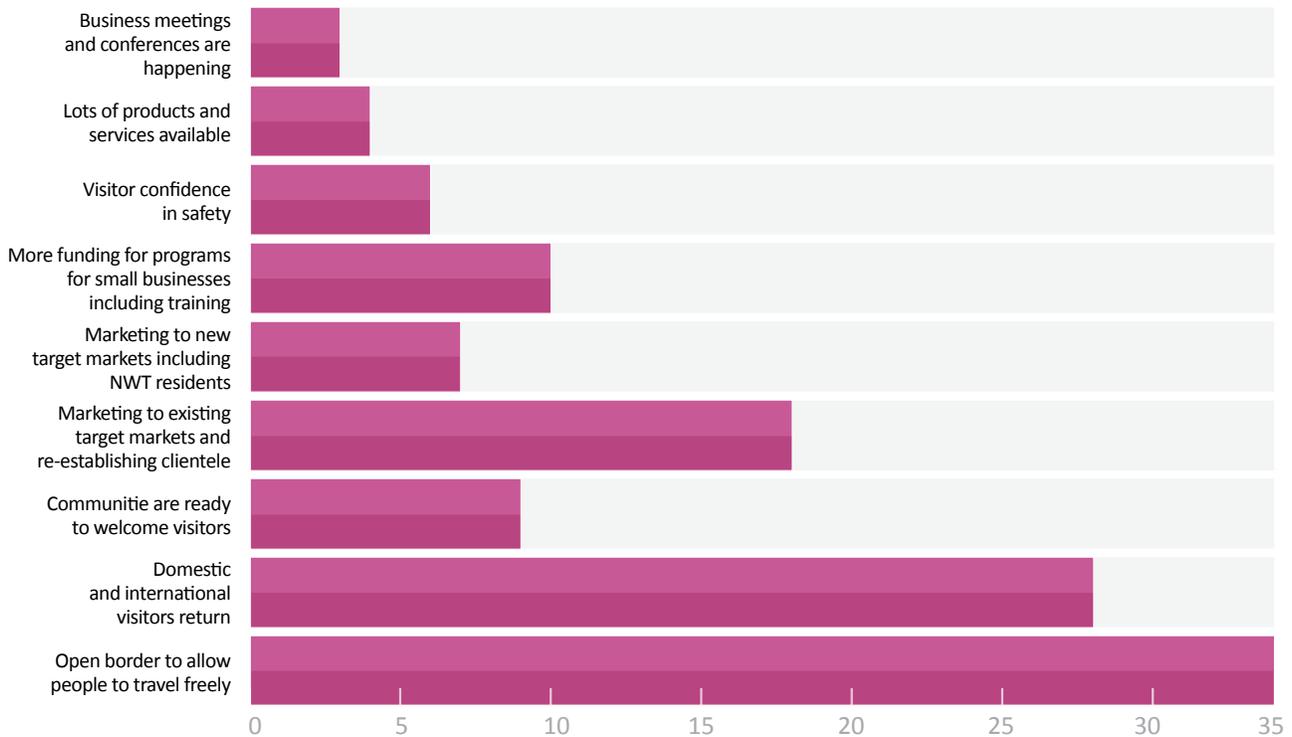
- develop criteria for funding that maps against tourism priorities
- funding should be provided to operators who live and work in the NWT
 - focus should not be on southern operators – not suggesting we forget about them but we need to focus on those operators located in the NWT first
- funding should only be provided to those operators who: can ensure that the money is going to businesses that are filling in tourism gaps; have strong business cases describing how the money will be spent; and, have residents that are supportive of the products/services, etc.

- implementing one-day fishing licence so fishers can do affordable one-day trips
- streamlining licensing to make it easier for operators

Survey

Figure 7 shows what recovery in the tourism industry looks like for survey respondents. Recovery most often looks like: open borders to allow people to travel freely (34; 28.6%), domestic and international visitors return (28; 23.5%), and marketing to existing target markets and re-establishing clientele (18; 15.1%).

Figure 7: Recovery looks like... (choose your top three)



3.5

What areas do you think ITI should focus on to help the tourism industry recover on the NWT in the next five years? (You can select more than one.)

Interviews

Figure 8 shows the areas that interview participants feel ITI should focus on to help the tourism industry recover. The most common areas to focus on include: creating more Indigenous products and services (11; 14.3%), more marketing campaigns (9; 11.7%), and helping businesses to develop new products and services (9; 11.7%).

During the interviews, participants made specific comments about the infrastructure. They felt the focus should be on the creation of: anchor products (e.g., VICs cultural centre, RV park that can support other tourism products and services), roads, parking, international airport, campgrounds, bed and breakfasts, hotels, roadside washrooms).

Interview participants identified a few 'other' areas that ITI should focus on to help the tourism industry recover, including:

- focusing supports on NWT-based tourism operators and particularly Indigenous operators
 - "Need more tourism operators out there in Indigenous tourism. There needs to be a lot more helping hands or guidance for people in the communities because they have products but they don't have the drive to make it happen and don't know necessarily how to push those products out".
- helping people get licences and helping them navigate the system - look at the operators out there and help them grow
- creating more products and services
 - there are a lack of products means less packages and less competitiveness
 - There is a need to go to those who already have a business and help them diversify and understand the legislative requirements. For example, "one operator has a canoeing company but they wanted to expand to hiking inclusion but were blocked and could not get approval. Businesses have to fork over a lot to make all partners happy and it shuts down some tourism products. Comes down to the *Tourism Act* and ITI's role to work with local people to help understand how the communities will benefit. The biggest struggle is having communities buy into these outfitters because they don't see how they would benefit from it. A lot of changes need to happen in processes".
- developing and creating partnerships with communities and businesses
- providing tourism businesses with an opportunity to come together to share best practices from other jurisdictions
- providing marketing money directly to outfitters who know their customer base best
- ensuring that visitors feel safe in the communities (with respect to the coronavirus)
- having policy work being carried out by ITI, GNWT and federally with respect to what sustainable and viable tourism in remote communities looks like in terms of numbers – all levels of government from coast to coast are selling Indigenous/cultural tourism but we don't fully understand the market – the interest and capacity of communities to engage in tourism



Survey

Figure 8 also highlights the areas that survey respondents feel ITI should focus on to help the tourism industry recover in the next five years. The most common areas to focus on include: providing investment such as grants (27; 19.4%), more marketing campaigns (15; 7.9%), and helping business diversify or enhance their product/service offering (15; 7.9%).

'Other' areas that survey respondents felt the NWT should focus on in the next five years to help the tourism industry recover include:

- simplifying the licensing process for small operators
- allowing operators to access lands for low cost purchase or lease in order to support the development and delivery of tourism products and services
- promoting unique areas, such as the barrenlands, that encourage tourism expansion but away from the communities
- helping existing tourism businesses with financial supports to deal with their losses (e.g., "providing longer term emergency funding to tourism businesses to replace the short-term federal funding")
- ensuring that the tourism infrastructure that supports the industry is maintained and operational when the border open
- creating new infrastructure (e.g. VIC, signage, connectivity) to support the industry
- addressing the possibility of increasing costs (e.g., hotels, airlines) when costs to travel and stay in the NWT are already very expensive compared to other jurisdictions
 - ensuring the NWT tourism industry does not price itself out of the market

- focusing more on the promotion of regional and municipal attractions
- working with Department of Health and Social Services to advocate for border openings and to plan for smart, risk mitigated travel as soon as possible to avoid further harm to the tourism industry

Figure 8: Priority Areas in the Next Five Years



3.6

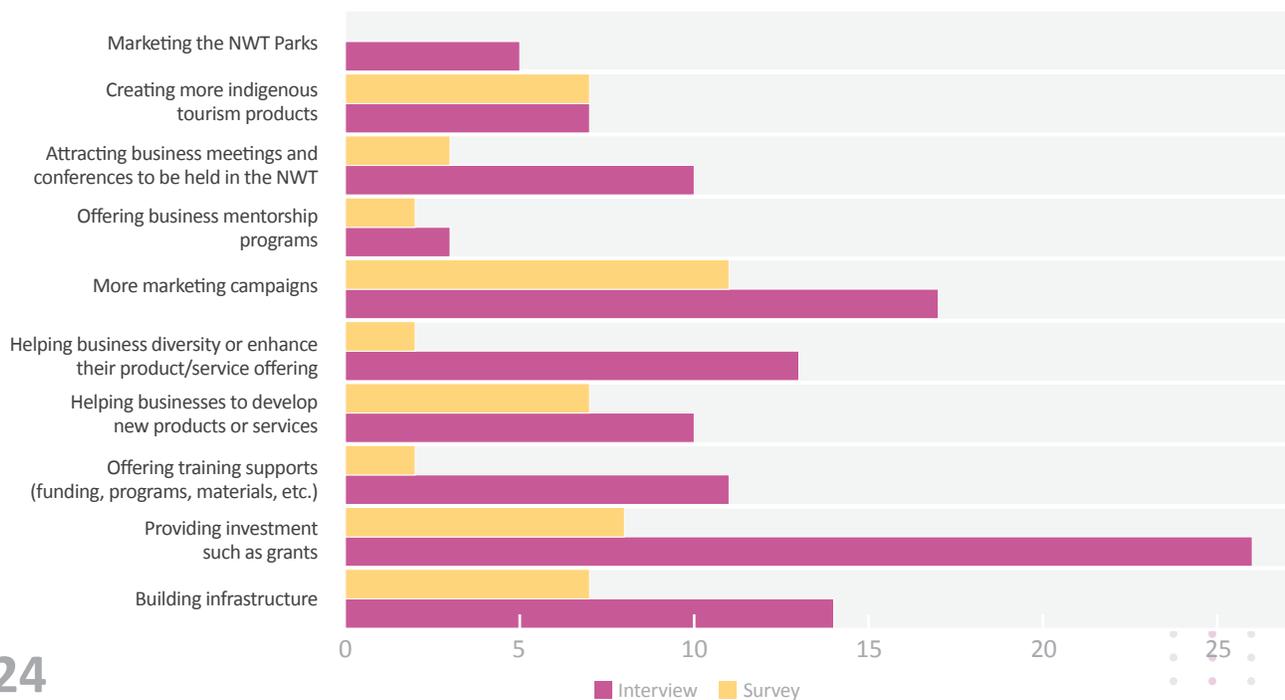
Which three areas do you think will be most effective at rebuilding the tourism industry in the NWT? (Select only three.)

Figure 9 reveals the three areas that interview participants feel will be most effective at rebuilding the NWT tourism industry. Many of the potential areas identified for selection were considered important. The most common areas include: more marketing campaigns (11; 22.4%), providing investment such as grants (8; 16.3%), creating more Indigenous tourism products (7; 14.3%), helping businesses to develop new products or services (7; 14.3%), and building infrastructure (7; 14.3%).

During the interviews, a few participants made comments about the specific areas. For instance, it was mentioned that while marketing for parks in the NWT is excellent, the problem remains that there is no easy way for people from the south to get into the parks. Another interviewee noted that businesses need to solidify what they are already doing rather than trying to diversify during a crisis. New things should be put on hold, and efforts focused on helping businesses enhance or deliver current products and services.

Figure 9 also shows the three areas that survey respondents feel will be most effective at rebuilding the tourism industry in the NWT. The three most common areas include: providing investment such as grants (26; 22.4%), more marketing campaigns (17; 14.7%), and building infrastructure (14; 12.1%).

Figure 9: Most Effective Areas for Rebuilding the NWT Tourism Industry



3.7

For the next five-year tourism strategy, there are several areas that are being explored. Please rate the level of importance of each area in the table below.

The areas explored in this question included:

- Investing in tourism
- Investing in product development
- Supporting more tourism development outside of Yellowknife
- Building knowledge and skills among the workforce through training and mentorship
- Engaging with operators and park visitors through enhanced communications and marketing activities
- Communicating with community residents to gain more support for tourism in the NWT
- Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry

While interview participants indicated that all of these areas are important, the three (3) areas considered the most important (based on extremely important and very important responses) include:

- Communicating with community residents to gain more support for tourism in the NWT (14; 77.8%)
- Investing in product development (13; 72.2%)
- Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry (11; 61.1%)

Survey respondents also indicated that all of the areas identified are important, but the three (3) areas considered the most important (based on extremely important and very important responses) include:

- Communicating with community residents to gain more support for tourism in the NWT (29; 70.7%)
- Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry (27; 65.9%)
- Engaging with operators and park visitors through enhanced communications and marketing activities (22; 53.7%)

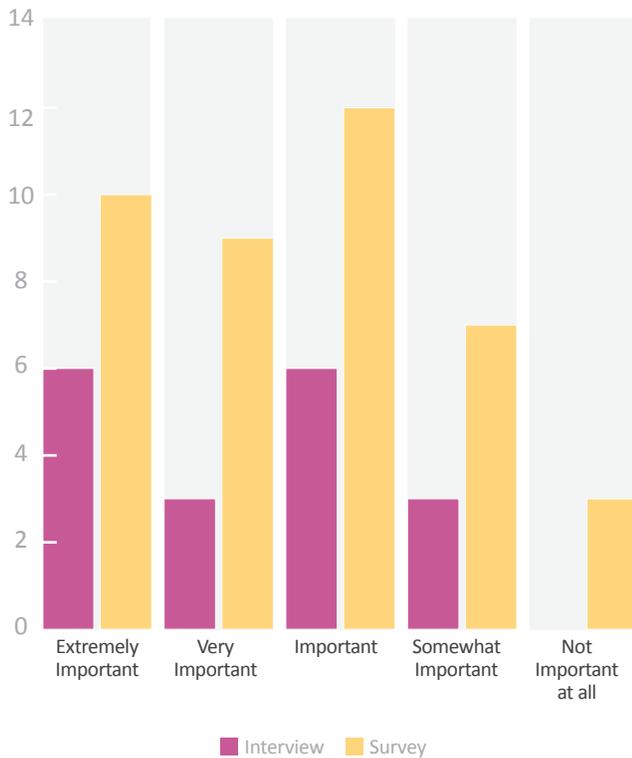
Specific information about the level of importance of all seven areas is presented in the following pages.

3.7.1

Investing in infrastructure

Figure 10 shows the level of importance rating for the priority area – investing in infrastructure. The majority of interview participants rated investing in infrastructure as having importance, with six (6) stating it is extremely important (33.3%), three (3) indicating it is very important (16.7%), and six (6) stating it is important (33.3%). The majority of survey respondents also rated investing in infrastructure as having importance, with 10 stating it is extremely important (24.4%), nine (9) indicating it is very important (22.0%), and 12 stating it is important (29.3%). A small number (3; 7.3%) feel that investing in infrastructure is not important at all.

Figure 10: Investing in Infrastructure – Level of Importance

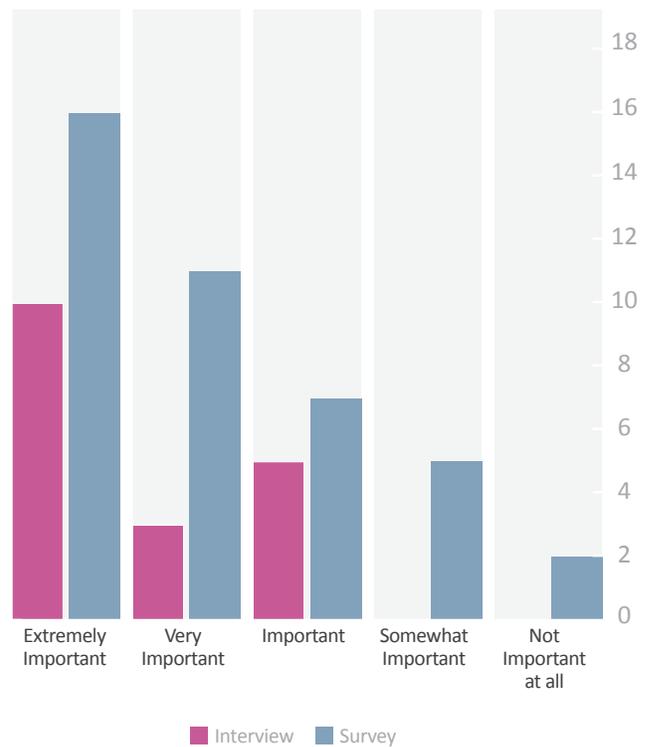


3.7.2

Investing in product development

Figure 11 shows the level of importance rating for the priority area – investing in product development. The majority of interview participants feel that investing in product development is extremely important (10; 55.6%). The majority of survey respondents feel that investing in product development is extremely important (16; 39.0) or very important (11; 26.8). Two respondents (4.9%) feel that it is not important at all.

Figure 11: Investing in Product Development – Level of Importance

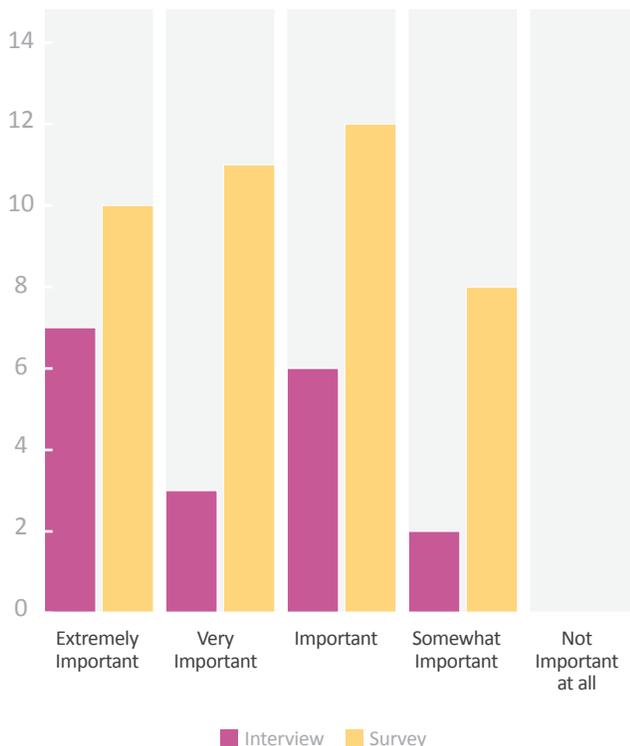


3.7.3

Supporting more tourism development outside of Yellowknife

Figure 12 shows the level of importance rating for the priority area – supporting more tourism development outside of Yellowknife. The majority of interview participants rated this area as having importance, with seven (7) stating it is extremely important (38.9%), three (3) indicating it is very important (16.7%), and six (6) stating it is important (33.3%). Similar to the interviewees, the majority of survey respondents feel that supporting more tourism development outside of Yellowknife is an area of importance, with 10 stating it is extremely important (24.4%), 11 indicating it is very important (26.8%), and 12 reporting it is important (29.3%).

Figure 12: Supporting More Tourism Development outside of Yellowknife – Level of Importance

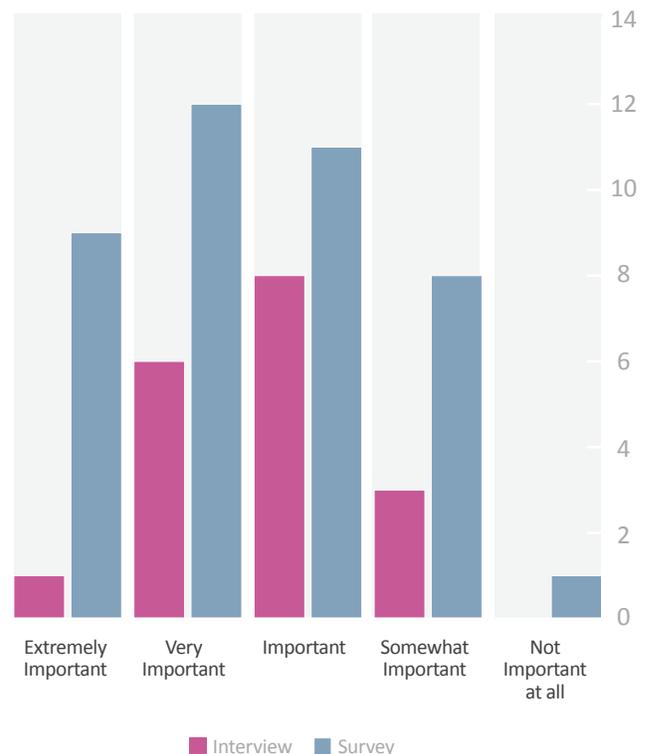


3.7.4

Building knowledge and skills among the workforce through training and mentorship

Figure 13 shows the level of importance rating for the priority area – building knowledge and skills among the workforce through training and mentorship. The majority of interview participants feel that this area is very important (6; 33.3%) or important (8; 44.4%). Similarly, the majority of survey respondents feel that this area is very important (12; 29.3%) or important (11; 26.9%). One (1) respondent (2.4%) feels this area is not important at all.

Figure 13: Building Knowledge and Skills among the Workforce through Training and Mentorship – Level of Importance

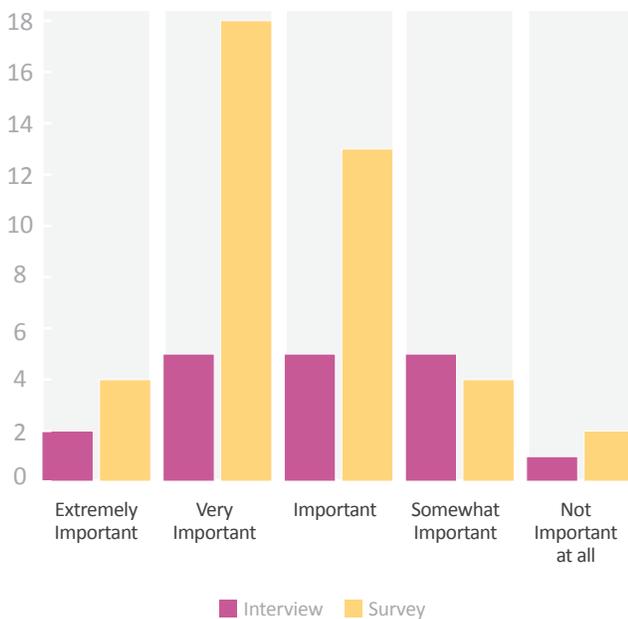


3.7.5

Engaging with operators and park visitors through enhanced communications and marketing activities

Figure 14 highlights the level of importance rating for the priority area – engaging with operators and park visitors through enhanced communications and marketing activities. Interview participants feel this area is equally, very important (5; 27.8%), important (5; 27.8%), and somewhat important (5; 27.8%). One participant (5.5%) indicated this area was not important at all. The majority of survey respondents feel that this area is very important (18; 43.9%) and important (13; 31.7%). Two (2) respondents (4.9%) feel this area is not important at all.

Figure 14: Engaging with Operators and Park Visitors through enhanced communications and marketing activities – Level of Importance

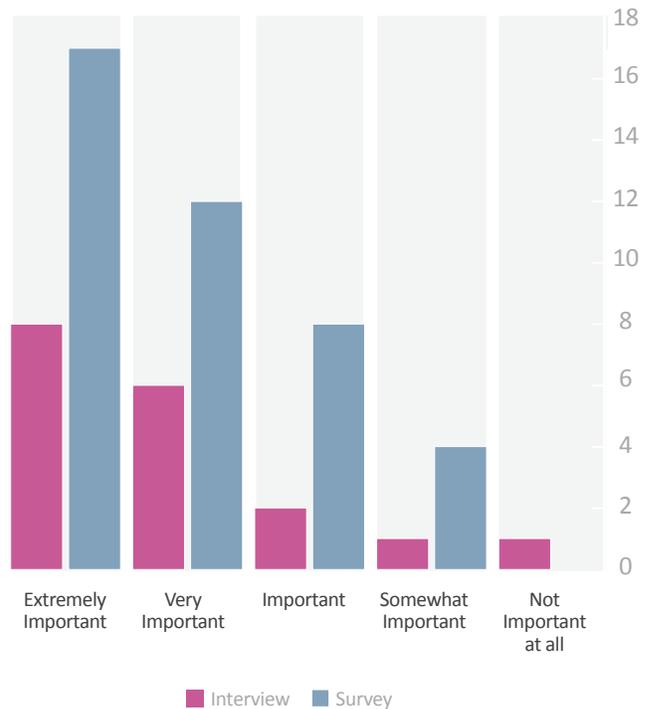


3.7.6

Communicating with community residents to gain more support for tourism in the NWT

Figure 15 reveals the level of importance rating for the priority area – communicating with community residents to gain more support for tourism in the NWT. The majority of interview participants feel that this area is extremely important (8; 44.4%) and very important (6; 33.3%). One (1) participant (5.5%) indicated this area was not at all important. The majority of survey respondents feel that this area has importance, with 17 stating it is extremely important (41.5%), 13 reporting it as very important (31.7%), and eight (8) indicating it is important (19.5%).

Figure 15: Communicating with community residents to gain more support for tourism in the NWT



3.7.7

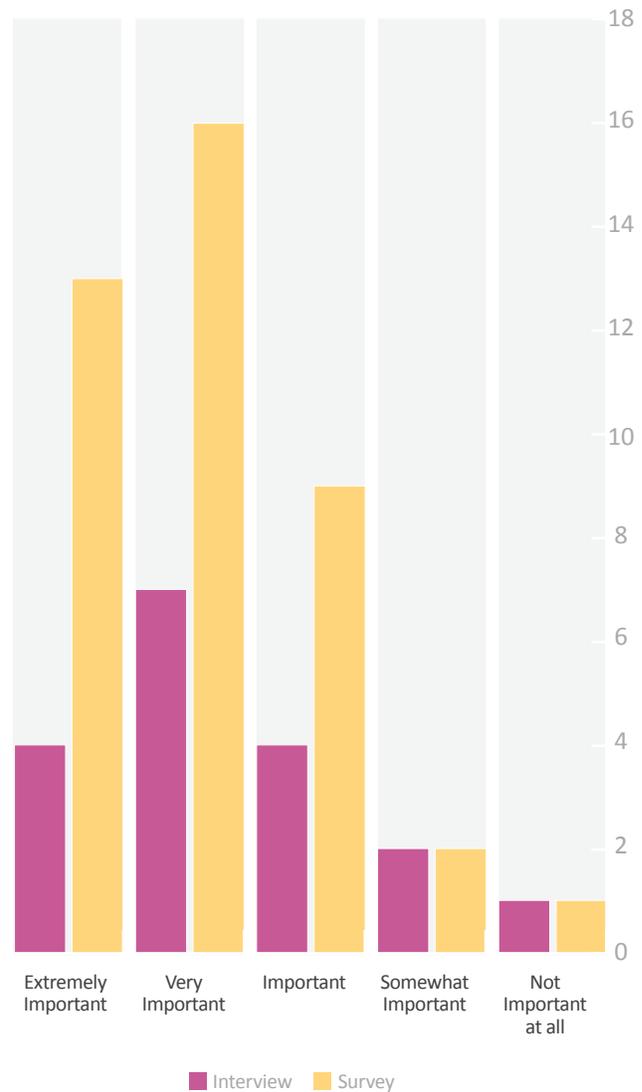
Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry

Figure 16 reveals the level of importance rating for the priority area – providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry. The majority of interview participants feel that this area has importance with four (4) stating it is extremely important (22.2%), seven (7) reporting it as very important (38.9%), and four (4) indicating it is important (22.2%). One participant (5.5%) indicated this area was not important at all. During the interviews, a few of participants made specific comments about the research and data collection. They noted that:

- numbers alone are not useful
- there is a need to understand how to use that data
- need to understand what the capacity is in Canada for authentic Indigenous experiences and how the NWT compares to other jurisdictions in which access to Indigenous groups is easier and cheaper
- without data to drive investment and marketing, the NWT will no have the correct direction necessary to rebuild the tourism industry.

The majority of survey respondents feel that this area is extremely important (13; 31.7%) and very important (16; 39.0%). One respondent (2.4%) feels that this area is not important at all.

Figure 16: Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry



3.8

Are there any areas that are missing from the list above?

Figure 17 reveals that two-thirds (12; 66.7%) of interview participants feel there are other priority areas that should be explored. These areas include:

- developing more tourism packages and partnerships so people can do a tour of the NWT and lots of communities can benefit
- focusing on NWT-based tourism operators - don't ignore southern-based operators, but the main focus should be on operators who live and work in the NWT
- focusing on companies that already deliver a product to "help them water the seed to grow into a beautiful flower"
 - help them by doing more research and data collection to identify what products and services tourists want now
- building a brand for NWT and focusing on having more of an online marketing presence - merge tourism and technology
- working with the Chief Public Health Officer in the NWT to help her better understand the tourism industry and the impacts that the border closures are having on the industry
- increasing ITI's understanding of the challenges and issues faced by tourism operators through first-hand experience of what operators are up against
- Ensuring that the infrastructure necessary to support tourism (e.g., commercial travel) remains
- increasing enforcement (there are a lot of operators without licences (e.g., Aurora, fishing) who end up bringing down operators with licences who are providing a good product/service)

Figure 17 reveals that 39% (16) of survey respondents feel there are other priority areas that should be explored. These main areas identified include transparency in decision making, bureaucracy, licensing and permitting, and the simplification of processes:

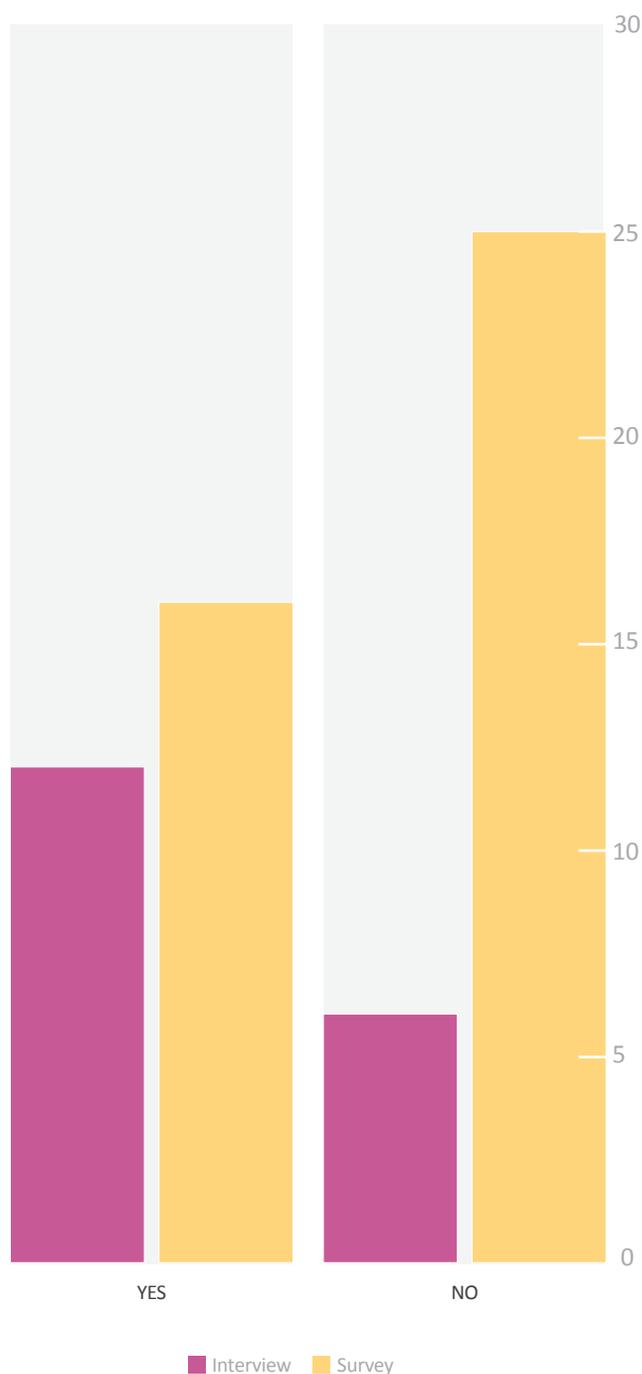
- increasing transparency in ITI and NWTT decision-making regarding where investments (i.e., grant money, marketing) to support more equitable allocation (i.e., focus not just on Aurora but other smaller products)
- working to make commercial land available through the Department of Lands and having the GNWT honour tour permits provided
- ensuring licences and permits are granted to qualified operators only
- reducing government bureaucracy (e.g., problem between ITI and MACA regarding the tourism licensing function)
 - simplifying, through the elimination of duplication, the licensing processes for small operators



Other areas that were said to be missing include:

- focusing marketing efforts on the NWT's history and culture and using those as cornerstones in the building of a new foundation to attract tourists (e.g., promoting museums and historic buildings, recognizing natural attractions, cultural history, maintaining historic pieces of history/transportation as attractions, etc.)
- providing more support for Indigenous operators through marketing and engagement
- involving operators in the marketing process rather than having marketing imposed on them with no input
- planning to get operators through the immediate crisis so that there will still be operators in existence when a vaccine has been developed and implemented
- addressing vandalism in Yellowknife
- engaging more with tourism operators/ various sectors to explore and brainstorm ideas regarding the tourism strategy over the next five years
- Bringing different segments of the tourism industry together a couple of times a year to brainstorm, to share ideas, and to strategize in an effort to make a more cohesive industry.

Figure 17: Other Areas of Importance



3.9

If you could tell the GNWT ITI to take action on one or two things as part of its next five year strategy for tourism, what would it be?

Interviews

When asked what one or two things ITI should take action on over the five-years, interview participants mentioned the following:

- developing and marketing Indigenous/cultural tourism products
- supporting Indigenous operators through training and skills building
- providing funding and grants for tourism businesses
- conducting tourism research and data collection and communicating the findings in a timely manner
 - identify the current strengths of the NWT tourism industry – marketing effort should focus on these strengths
 - identify gaps that need to be filled – will help operators decide what products and services it makes sense to focus on
- increasing money for marketing to ensure that NWT as a destination is widely promoted
- focusing marketing efforts on
 - domestic markets - “Focus on Canadian tourists first. Bring more Canadians to the north and form partnerships with rocky mountain areas so there is a shared approach to market to Canadians to say, ‘Hey come see the beautiful sites of Canada’”
- diversifying the tourist market – the type of tourists and where they are coming from
- promoting wide-open expansive land of the NWT
- promoting hunting and fishing and outdoor adventure.
- providing marketing funds directly to the operators, not the DMO, because the DMO creates generic marketing that does not help independent operators and focuses mostly on Aurora viewing
 - the experts are the operators who live and breathe the experiences and opportunities
- developing infrastructure to support tourism
- developing more eco-friendly and social distanced travel opportunities
 - including more indigenous tourism, canoeing, nature experiences
- creating a stronger brand for the NWT
- ensuring that the 2025 Tourism Strategy aligns with other tourism strategies and research that have been developed/carried out (e.g., City of Yellowknife is working with the YKDFNs to develop an economic development strategy) – need to work with them to align the strategies
- providing training opportunities in areas such as improving operator professionalism and ensuring consistency of products and services
- creating a mechanism that helps ensure accountability for the private sector for funds received for product investment and diversification help ensure NWT is getting value for money
- ongoing engagement with the communities to build local acceptance of tourism and to start residents thinking about travelling in their own Territory



Survey

When asked what one or two things ITI should take action on over the five years, survey respondents focused primarily on marketing. They noted that marketing efforts need to be strengthened, focused on the domestic market, and diversified to include all products and services (not just Aurora viewing) and all regions of the NWT (not just Yellowknife). There are some that believe that marketing dollars should be given directly to the operators because they know their customers better than the DMO.

Survey respondents also commonly noted the importance of maintaining/enhancing tourism training, mentorship and funding programs, and providing specific supports to: (1) Indigenous operators; (2) NWT operators with established products and services rather than to new operators without market ready products or southern operators; (3) small tourism businesses; and, (4) regions and communities interested in developing growing their tourism products and services. They also noted the importance making it easier for tourism operators to start a business.

Respondents also mentioned the following action areas:

- direct engagement with local small tourism businesses so that ITI can develop an understanding of how they can better support these operations
 - invest in building/maintaining infrastructure
 - increase tourism products and services across the territory
 - enforce existing regulations (as they relate to Aurora viewing) to ensure quality products are being delivered by licensed tourism operators (this help protect our reputation in this area)
- work with GNWT to re-think its approach to COVID-19 (i.e., closed borders) – focus on risk mitigation as opposed to risk elimination, which is not realistic, practical, or tolerable
 - financial supports such as interest free loans for existing operators and waiving licensing fees
 - ensure NWT operators remain competitive with other jurisdictions
 - simplify licensing processes

3.10

Is there anything else that you would like to share?

Interviews

Other items that interview participants wanted to mention or re-iterate include:

- ensuring that core funding for marketing through the NWT continues because NWT Tourism is doing a good job and needs to ensure there are funds available to keep the office open and the staff working
- not neglecting the museums and cultural centres.
 - “I had to call Spectacular NWT to ask for museums to be added as a story. We need to focus on indoor attractions as well as those outside. We need increased support”.
- focusing on marketing the NWT as a world class destination
- because ITI is linked to a lot of different areas – farming, mining, arts and crafts – they have opportunities to identify, leverage and support operators developing new tourism products and services
- pushing ITI to think about using tourism education and training materials developed by other organizations rather than developing their own – recognize they cannot be all things to all people
 - For example, HRSDC offers a number of tourism courses/modules
 - Use national tourism standards – this will ensure people are trained as per the standards (as they are in other jurisdictions)
- for ITI to focus on how the COVID-19 pandemic is really affecting operators and what they are losing.
 - ITI should be supporting operators that have a desire to have a COVID operation plan. How can they do this work if they have a COVID operation plan? Rather than being shut down completely. If there are people who are going to isolate and aren't going to be around people, they should be able to do that. Support operators to create COVID plans to help them function in this current climate to ensure safety
 - ITI should reach out to communities to encourage tourism within the communities through marketing and a subsidy to support northern travel for Northern.
- creating a non-partisan committee to review the TOL applications and make decisions to increase fairness and transparency of selection
 - Committee should be composed of NWT-based operators, Indigenous operators and GNWT staff
- focusing on tourist retention



Survey

Other items that survey respondents wanted to share or re-iterate include:

- ensuring equal allocation of tourism funding to operators regardless of their size
 - Recognize that every single operator brings worth and strength to the tourism products in the NWT.
- having ITI act as the sole issuer of tourism operator licences and business licences (for businesses outside of Yellowknife), and have ITI take over inspections - this will ensure ITI has the sole authority to regulate tourism operators and significantly cut down unwanted bureaucratic processes
- investing in infrastructure
 - accommodation in Yellowknife
 - road development and maintenance
 - trails
 - pull off areas
 - signage
 - airports and runways
 - bike lanes in Yellowknife
 - bathrooms available downtown for everyone
 - bus service to and from the airport
 - move tennis court to a new location from the swimming pool area
 - develop the Frame Lake beach area more
 - with Thaidene Nënë opening the communities of Hay River, Fort Resolution and Łutsel K'e will be the doorway for travel to this amazing new park. Investment in accessing the park and infrastructure in the region would be beneficial.
- increasing tourism products, services and attractions
 - park food trucks all in one area with a nice picnic site available in the downtown area so people want to go downtown.
 - more festivals and events downtown to keep the down town area alive
 - open up the washrooms at the park at city hall
 - jump on jump off bus service along the entire Franklin Avenue
- assisting retailers and galleries that service the tourism market.
- improving enforcement of those with tourism operator licences and fines for anyone working without a licence
- developing a comprehensive territorial plan to gather data on who is visiting, from where, what are they coming to see/do, what did they like, what did they dislike, etc.
 - This data is currently only compiled through tourism member outfitters and predominately from Yellowknife - this does nothing to assist other regions/communities in understanding how to grow their tourism trade
- Increasing marketing in Canada and to residents in the NWT
- providing immediate financial supports to existing tourism operators
- focusing tourism strategy on the next 12 to 24 months because most of us won't be around in five years if there is no plan to help sustain our businesses in the near future
- making commercial land available to more than a select few
- GNWT re-visiting its approach to the COVID-19 pandemic
- focusing on a Canadian only season with some support for businesses affected by international travel (by August it looks as though BC, Alberta and Saskatchewan could be at zero cases so open border to them)
- focusing support and future engagement efforts on the long-term operators who know and have experience

- ensuring airlines (e.g., Canadian North) are operating regular scheduled flights by 2021 or the NWT will lose its competitive advantage
- considering limiting the number of operators in each region, not issuing any new licences until recovery has occurred and demand increases beyond the ability for existing operators to handle and, placing residency requirements on licence holders- minimum of two years
- ITI getting information gathered in surveys out to those involved in the tourism industry in a timely manner so that informed decisions can be made





4.0

Next Steps

The feedback gathered from stakeholders and presented in this document will help inform and guide ITI in the development of the next tourism strategy to be released in 2021.

These responses will be carefully reviewed alongside information obtained during a national and international jurisdictional review of tourism strategies (e.g., products, marketing, etc.), previous stakeholder engagement activities, and an evaluation of the outcomes of Tourism 2020.

The strategy will identify goals and actions to strengthen the tourism industry as it recovers from the devastating impacts of the COVID-19 pandemic. It will serve as a roadmap to guide tourism investments by the Government of the Northwest Territories (GNWT) from 2021 to 2025.

Those interested can expect to be kept up-to-date on strategy release and implementation through the Department of Industry, Tourism and Investment's website, social media, and direct email outreach channels in the coming year.

5.0

Contact

For more information about this report,
please contact:

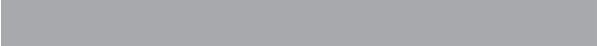
Drew Williams

Assistant Director, Strategic Communications
Department of Industry, Tourism and Investment

Drew_Williams@gov.nt.ca

1-867-767-9202 ext 63037





Appendices

Appendix A: Interview Questions

Appendix B: Online Survey Questions

Appendix A

Interview Questions

1. Which region of the Northwest Territories do you operate in? (select one)
 - North Slave
 - South Slave
 - Beaufort Delta
 - Sahtu
 - Dehcho
 - Pan-territorial
 - Other (please specify):
2. Are you a licensed tourism operator?
 - No
 - Yes
3. What is the primary area in which you offer products/services? (select one)
 - Aurora or northern lights viewing
 - Fishing
 - General touring (general interest and sightseeing)
 - Hunting
 - Outdoor adventure
 - Business travel
 - We offer products/services across multiple/all areas
 - Other (please specify):
4. What sector do you operate in?
 - Accommodation
 - Food and Beverage
 - Transportation
 - Attractions
 - Adventure and recreation
 - Events and Conferences
 - Travel Trade
 - Tourism Services
 - Other (please specify):
5. In the short-term (next 12 months), what do you think are the most pressing issues that the NWT tourism industry will face?
6. Thinking about the next 5 years (long-term), what do you think are the most pressing issues that the NWT tourism industry will face?
7. Now, let's assume that COVID-19 is behind us; a vaccine has been introduced and tourism is back on track. What do you see as the greatest tourism development opportunities for the NWT?
8. Once the COVID-19 pandemic is over, recovery can begin for the tourism industry. What does recovery look like for you?





9. Which areas do you think ITI should focus on to help the tourism industry recover in the NWT in the next 5 years? *(You can select more than one.)*

- Building infrastructure
- Providing investment such as grants
- Offering training supports (funding, programs, materials, etc.)
- Helping businesses to develop new products or services
- Helping business diversify or enhance their product/service offering
- More marketing campaigns
- Offering business mentorship programs
- Attracting business meetings and conferences to be held in the NWT
- Creating more Indigenous tourism products
- Marketing the NWT Parks
- Other (please specify):

10. Which three areas do you think will be most effective at rebuilding the tourism industry in the NWT? *(Select only three.)*

- Building infrastructure
- Providing investment such as grants
- Offering training supports (funding, programs, materials, etc.)
- Helping businesses to develop new products or services
- Helping business diversify or enhance their product/service offering
- More marketing campaigns
- Offering business mentorship programs
- Attracting business meetings and conferences to be held in the NWT
- Creating more Indigenous tourism products
- Marketing the NWT Parks

11. For the next five-year tourism strategy, there are several areas that are being explored. Please rate the level of importance of each area in the table below.

Areas	Not important at all	Somewhat important	Important	Very important	Extremely important
Investing in infrastructure					
Investing in product development					
Supporting more tourism development outside of Yellowknife					
Building knowledge and skills among the workforce through training and mentorship					
Engaging with operators and park visitors through enhanced communications and marketing activities					
Communicating with community residents to gain more support for tourism in the NWT					
Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry					

12. Are there any areas that are missing from the list above?

No

Yes, please describe:

13. If you could tell the GNWT ITI to take action on one or two things as part of its next five-year strategy for tourism, what would it be?

14. Is there anything else that you would like to share?

*Thank you for your
participation!*



Appendix B

Online Survey Questions

1. Which region of the Northwest Territories do you operate in? (select one)
 - North Slave
 - South Slave
 - Beaufort Delta
 - Sahtu
 - Dehcho
 - Pan-territorial
 - Other (please specify):
2. Are you a licensed tourism operator?
 - No
 - Yes
3. What is the primary area in which you offer products/services? (select one)
 - Aurora or northern lights viewing
 - Fishing
 - General touring (general interest and sightseeing)
 - Hunting
 - Outdoor adventure
 - Business travel
 - We offer products/services across multiple/all areas
 - Other (please specify):
4. What sector do you operate in?
 - Accommodation
 - Food and Beverage
 - Transportation
 - Attractions
 - Adventure and recreation
 - Events and Conferences
 - Travel Trade
 - Tourism Services
 - Other (please specify):
5. In the short-term (next 12 months), what do you think are the most pressing issues that the NWT tourism industry will face? (choose your top 3)
 - Border closure, travel restrictions and self-isolation requirements
 - Going out of business and experiencing financial problems
 - Developing and implementing new safety protocols and meeting safety requirements
 - Hiring and training new employees
 - Being able to ramp back up, increase operations and build capacity
 - Making products and services more affordable for NWT residents and marketing to them
6. Are there any others that should be included?
 - Other: _____

7. Thinking about the next 5 years (long-term), what do you think are the most pressing issues that the NWT tourism industry will face? (choose your top 3)
- Consumer confidence and peace of mind while travelling
 - Marketing – marketing inside Canada, re-establishing international markets, marketing to new and repeat visitors
 - Lack of products and services
 - Increasing competition to attract visitors
 - Development of infrastructure that supports tourism
 - Increasing costs to visit the NWT
 - Hiring and retaining skilled employees
 - Residents being positive and supportive of tourism
8. Are there any others that should be included?
- Other: ____
9. Once the COVID-19 pandemic is over, recovery can begin for the tourism industry. What does recovery look like for you? (choose your top 3)
- Open borders to allow people to travel freely
 - Domestic and international visitors return
 - Communities are ready to welcome visitors
 - Marketing to existing target markets and re-establishing clientele
 - Marketing to new target markets including NWT residents
 - More funding for programs for small businesses including training
 - Visitor confidence in safety
 - Lots of products and services available
 - Business meetings and conferences are happening
10. Once the COVID-19 pandemic is over, recovery can begin for the tourism industry. What does recovery look like for you?
11. Which areas do you think ITI should focus on to help the tourism industry recover in the NWT in the next 5 years? (You can select more than one.)
- Building infrastructure
 - Providing investment such as grants
 - Offering training supports (funding, programs, materials, etc.)
 - Helping businesses to develop new products or services
 - Helping business diversify or enhance their product/service offering
 - More marketing campaigns
 - Offering business mentorship programs
 - Attracting business meetings and conferences to be held in the NWT
 - Creating more Indigenous tourism products
 - Marketing the NWT Parks
 - Other (please specify):
12. Which three areas do you think will be most effective at rebuilding the tourism industry in the NWT? (Select only three.)
- Building infrastructure
 - Providing investment such as grants
 - Offering training supports (funding, programs, materials, etc.)
 - Helping businesses to develop new products or services
 - Helping business diversify or enhance their product/service offering
 - More marketing campaigns
 - Offering business mentorship programs
 - Attracting business meetings and conferences to be held in the NWT
 - Creating more Indigenous tourism products
 - Marketing the NWT Parks





13. For the next five-year tourism strategy, there are several areas that are being explored. Please rate the level of importance of each area in the table below.

Areas	Not important at all	Somewhat important	Important	Very important	Extremely important
Investing in infrastructure					
Investing in product development					
Supporting more tourism development outside of Yellowknife					
Building knowledge and skills among the workforce through training and mentorship					
Engaging with operators and park visitors through enhanced communications and marketing activities					
Communicating with community residents to gain more support for tourism in the NWT					
Providing more research and data in a timely manner to stakeholders that supports data-driven investments and decisions in the industry					

14. Are there any areas that are missing from the list above?

- No
- Yes, please describe:

15. If you could tell the GNWT ITI to take action on one or two things as part of its next five-year strategy for tourism, what would it be?

16. Is there anything else that you would like to share?

