

Yellowknives Dene First Nation & City of Yellowknife Joint Economic Development Strategy



2020
Technical Report





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Appendix A: Yellowknives Dene First Nation Action Plan Comments

In addition to the broad strategic directions and priority actions identified, there were several smaller action items identified by Yellowknives Dene First Nation stakeholders during the strategic planning process. While valuable, these actions were deemed non-priority and so were not included within the main strategic report as the suggestions were generally smaller in scope, either extremely time or location specific, and generally were geared towards one stakeholder group. In other words, these actions and suggestions did not qualify as being joint leavers towards economic development that both the City of Yellowknife and the Yellowknives Dene First Nation have direct control over. The following table lists all of these additional, non-priority action items, as they are still invaluable for local economic development officers to consider when conducting business planning activities.

Relating Action Item	Actions and Suggestions
Action 1.1 – Entrepreneurship Hub	<ul style="list-style-type: none"> ▪ Conduct tradeshow to attract people to events. ▪ Leverage to better market Yellowknives Dene First Nation to outside investors. ▪ The hub should include programs related to hunting and trapping. ▪ The hub must focus on sustainability and knowledge sharing. ▪ The hub’s location must be easily accessible for people with transport limitations. ▪ Leverage external resources, do not reinvent the wheel. ▪ A subbranch or office could be established in Ndilo. ▪ The hub should offer workshops for youths. ▪ Membership fees should be waived for local income or disadvantaged groups.
Action 1.2 – Data Collection and Management	<ul style="list-style-type: none"> ▪ Consider implications of data ownership and privacy. <ul style="list-style-type: none"> ▪ The information must be protected and not shared. ▪ YKDFN data collection should include the member spouse and location of where they live to better understand household income and demographics. ▪ It is essential to collect data on YKDFN employment as this is currently a data gap. ▪ Develop a data bank on students who have graduated and their current employment level. Use this information to create more tailored education programs.



Relating Action Item	Actions and Suggestions
Action 2.1 – Polytechnic University	<ul style="list-style-type: none"> ▪ There must be cultural components included in the creation of the polytechnic university, specifically indigenous language. ▪ Consider incorporating Indigenous cultural elements in the building structure (e.g. tepee styled structure). ▪ Lobby for better post-secondary programs to encourage more people to take educational courses (e.g. social work program, hospitality courses etc.). ▪ It is essential that Yellowknives Dene First Nation should have representation in the creation of university and course content. ▪ Investigate incentives to reduce education staff turnover as this disrupts student learning. ▪ Investigate if the Polytechnic University could be built in Chief Drygeese Territory (e.g. junction of Dettah and City limits, behind legislative assembly etc.).
Action 2.2 – Increasing Participation of Skilled Trades Programs	<ul style="list-style-type: none"> ▪ Programs should include Yellowknives Dene First Nation traditional skills such as: woodworking trade, bush skills, canoe making, totem poles, drums etc. ▪ Focus must be on encouraging individuals to participate on their own and then start businesses upon graduation. <ul style="list-style-type: none"> ▪ Investigate entrepreneurship support post-graduation from the program. ▪ Lobby government to assist in attracting more First Nation participants. Participation in the process must be made easier. ▪ Greater access to trades for First Nation members would decrease social issues, poverty and homelessness. ▪ Investigate ways for Yellowknives Dene First Nation to administer programs for training. ▪ Yellowknives Dene First Nation must be included and involved in training creating and instruction. ▪ Work on partnership development.



Relating Action Item	Actions and Suggestions
Action 2.3 – Work Integrated Learning Opportunities	<ul style="list-style-type: none"> ▪ Must focus on high school opportunities as this sets student up to succeed later in life. ▪ Investigate developing an employment program on the land, focused on learning about the traditional economy. ▪ Need greater access to on-the-job training. ▪ Need to include succession planning when developing these opportunities. ▪ Develop more short upskilling courses.
Action 2.4 – Regional Collaboration	<ul style="list-style-type: none"> ▪ Organizations must work together to collaborate, share information and best practices. ▪ Focus on getting more Yellowknives Dene First Nation representation in these regional collaboration efforts.
Action #3.1 – COVID-19 Recovery and Support	<ul style="list-style-type: none"> ▪ While the entrepreneurship hub is being developed, there needs to be a centralized place for businesses to obtain information on starting a business. ▪ Continue offering current financial support programs.
Action #3.2 – Joint Visitor Centre Development	<ul style="list-style-type: none"> ▪ Include a space for Yellowknives Dene First Nation history within the centre. <ul style="list-style-type: none"> ▪ Focus on Yellowknives Dene First Nation cultural incorporation and branding (e.g. Yellowknives Dene First Nation flag should hang outside of the building.) ▪ Investigate using the centre as a cultural centre. ▪ Utilize the space as a centre for education and learning. ▪ Include a place to talk about the legacy and impact of the Giant Mine on the Yellowknives Dene First Nation’s people and broader economy. ▪ Focus on employing both Yellowknives Dene First Nation and Yellowknife residents.



Relating Action Item	Actions and Suggestions
Action #3.3 – Friendship Festival	<ul style="list-style-type: none"> ▪ The celebration needs to be specific and clear what is be celebrated – the working group should define that. ▪ This should be an annual festival where First Nation members and Yellowknife residents work together to build friendship and trust. ▪ Investigate funding sources and sponsorship to ensure the event is successful long term. ▪ The event should include Indigenous vendors, arts and crafts, and food. ▪ Investigate publishing a joint report or magazine publishing joint activities and successes between the City of Yellowknife and Yellowknives Dene First Nation.
Action #3.4 – Culture Training and Certification	<ul style="list-style-type: none"> ▪ Focus on creating a licencing program for tourism businesses operating on Yellowknives Dene First Nation land or selling products or services related to indigenous culture.
Action #3.5 – Creating the Tourism Experience of Tomorrow	<ul style="list-style-type: none"> ▪ Focus on creating a Dene resource centre. ▪ Investigate creating a cultural immersion app that teaches visitors about Yellowknives Dene First Nation history and culture.
Action #3.6 – Product Development and Branding	<ul style="list-style-type: none"> ▪ Need to add more indigenous structures within the city as a tourism attraction. ▪ Focus on more co-brand development initiatives. ▪ Remove the polar bear from the Airport. ▪ Develop a sign and monument at the Tlicho border that says, “Welcome to Chief Drygeese Territory”. ▪ Prioritize airport redesign.



Appendix B: Strategic Sectors of Interest

Export Development and Import Substitution – Initial Sector Research

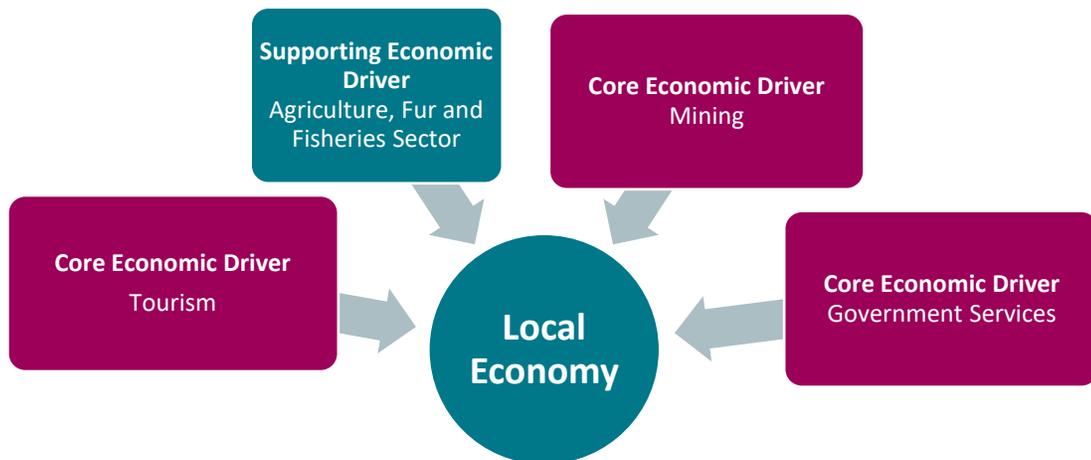
In order to create a robust economic development strategy which builds on the unique assets and resources of both the Yellowknives Dene First Nation communities and the City of Yellowknife, initial sector research was conducted. The purpose of this sector research was to better understand the major and supporting economic drivers within the region, and how these sectors changed (e.g. in light of COVID-19), and some initial opportunities and best practice research on how best to recover from the global pandemic.

These key sectors for economic growth were initially identified throughout the background analysis and stakeholder engagement process and are pictured in Figure 1. They are categorized as Core Economic Drivers – those key sectors that pour external or new money into the economy – and Supporting Economic Drivers – those smaller and ancillary sectors of the economy that are still a vital component of economic growth.

It is important to note that this research was conducted at the height of the COVID-19 pandemic.

Overall, this research helped to form the long list of 10 economic development opportunities presented in the final report. The final three strategic directions were then decided during a full day workshop (Selection of Future Directions Workshop 3), with senior members of Yellowknives Dene First Nation and City of Yellowknife leadership teams.

Figure 1: Economic Drivers for the City of Yellowknife and Yellowknives Dene First Nation





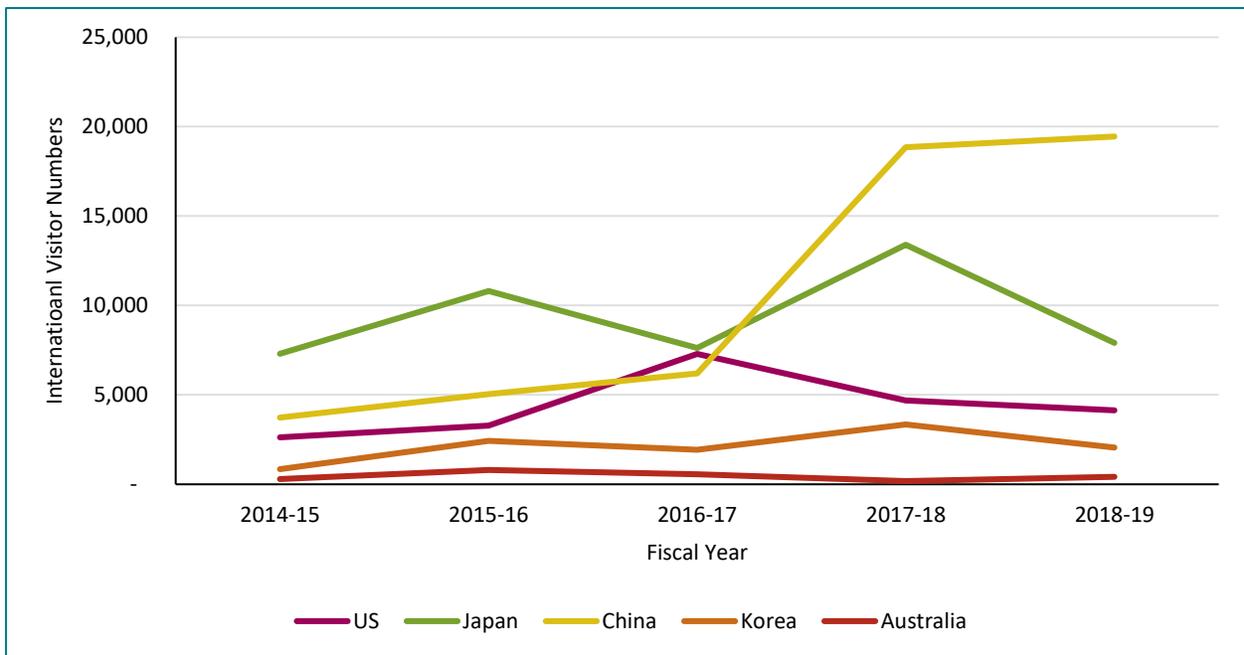
Tourism

Pre COVID-19 – A Thriving Industry

Before the COVID-19 pandemic, tourism within the Northwest Territories (NWT) was experiencing rapid growth. It was considered by the Government of the Northwest Territories (GNWT) to be a key driver of economic diversification. The sector was a bright hope for the region, offering new opportunities for small businesses and workforce growth that was not reliant on the important, yet cyclical mineral sector.

In 2018-19 both the Northwest Territories and the Yukon recorded record visitor numbers, with the GNWT generating \$210 million in visitor spending in the 2018-19 fiscal year, three years earlier than their 2021 target of \$207 million.¹ Within Yellowknife, statistics on the arrival of visitors to Yellowknife Airport showed that over six years, visitor numbers increased by 81% (52,392 people), totalling 117,030 in the 2018-19 fiscal year.² An influx of East Asian travellers caused this record-setting growth (e.g. China, Hong Kong and Japan), with nearly two and a half times more Chinese visitors recorded in the 2018-19 fiscal year than the second-largest market, Japan.

Figure 2: International Visitor Origin by Top Countries, Yellowknife Airport



Source: Adapted from [Government of Northwest Territories Tourism Research, 2019](#)

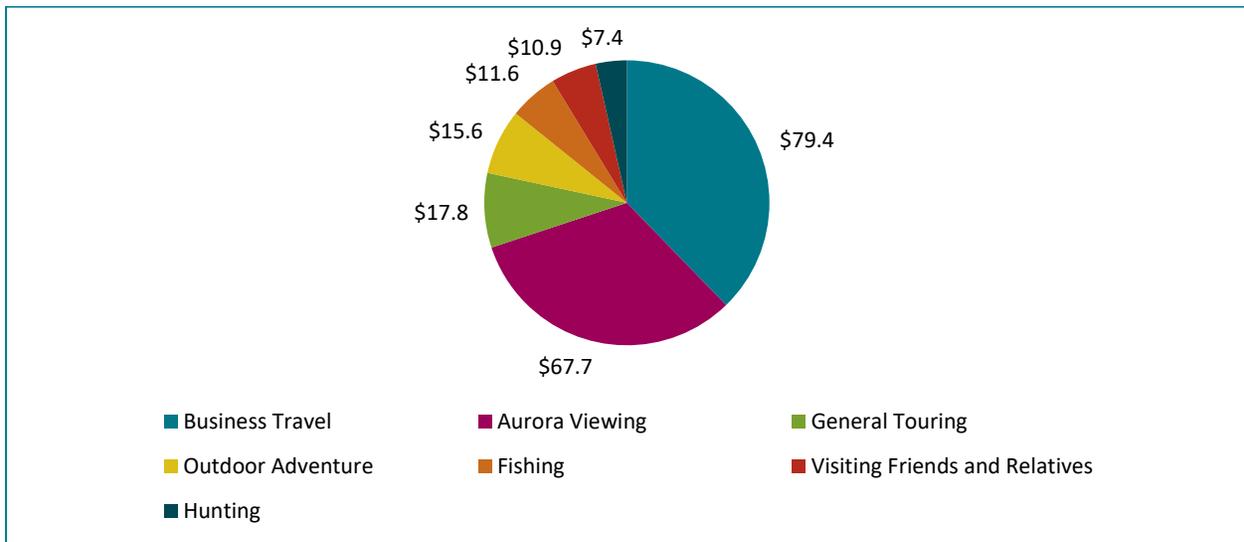
¹ The Government of the Northwest Territories, [Northwest Territories Visitor Spending, 2019](#)

² The Government of the Northwest Territories Tourism Research, [Yellowknife Airport Non-Resident Visitor Origin by Country, 2019](#)



From a recreational perspective, the primary purpose of visits to the region was for Aurora Borealis viewing. The number of tourists increased by 153% over the past five years to 41,500, generating \$67.70 million in visitor spending. General touring was another popular reason to travel with 17,900 visitors in 2017-18 or \$17.80 million in spending (see Fig. 5). Business Travel is another lucrative sector of the visitor economy for the region generating the majority (\$79.4 million) of revenue. Overall, the immense value that the tourism sector offers the City of Yellowknife and the communities of the Yellowknives Dene First Nation and that investigating the potential to grow these core sectors should be a focus of this joint economic development strategy.

Figure 3: Northwest Territories Visitor Spending (millions), 2019



Source: Adapted from [Government of Northwest Territories Tourism Research, 2019](#)

Indigenous Tourism Growth

Regarding indigenous tourism, specific visitor numbers or spend within the Yellowknives Dene First Nation communities were not available. Better data gathering for all tourism activities outside of Yellowknife, particularly those within the Yellowknives Dene First Nation communities, is an opportunity for improvement. However, recent research from the Conference Board of Canada and the Indigenous Tourism Association of Canada (ITAC) found that pre-COVID-19, the national indigenous tourism sector, was outpacing Canadian tourism activity overall.³

Key findings from the research indicated that the direct economic benefits (e.g. the money initially spent for salaries, supplies, raw materials and other operating expenses) creates additional activity in the local economy. Gross Domestic Product (GDP) attributed to the indigenous tourism sector in Canada increased by 23.2% between 2014 and 2017, going from \$1.4 billion to \$1.7 billion. Compared to the 14.5% increase in overall tourism activity in Canada, this growth shows the considerable potential of the Indigenous tourism sector (Figure 4).

³ Conference Board of Canada & Indigenous Tourism Association of Canada, [Canada's Indigenous Tourism Sector – Insights and Economic Impacts](#), May 2019



Figure 4: Reported Indigenous Tourism Progress on Key ITAC’s 2024 Goals

Measures	2014 Estimates	2017 Estimates	2024 Goals
Direct employment - peak employment (000s)*	33.1	39	49.4
Direct GDP (\$ billions)**	1.4	1.7	2.2
Export-ready businesses (number)	80	133	200

*The 2015 report excluded Indigenous tourism businesses in the Northwest Territories.

**The 2015 report reported standardized employment estimates as full-time-equivalent jobs and not as full-year jobs. The 2015 report produced GDP estimates in 2014 \$ terms. The 2019 report estimates these figures using inflation-adjusted 2017 \$ terms

Source: Adapted from the [Conference Board of Canada & Indigenous Tourism Association of Canada](#).

Key Tourism Challenges

Sustainable Tourism Growth

Pre COVID-19, a key challenge facing the City of Yellowknife and Yellowknives Dene First Nation was limited accommodation space.⁴ For example, during prime aurora viewing periods such as late September and December to January, the City of Yellowknife saw high occupancy rates. While positive for local businesses, stakeholders interviewed raised concerns regarding the sustainability of this growth and the need for better management of visitor arrivals. The core objective of the sector must be sustainable tourism, where residents are supportive of visitors.

Fostering Indigenous Entrepreneurship

Entrepreneurship remains an exciting avenue for economic and workforce growth amongst indigenous communities and is rising across Canada. However, according to new research published by the Conference Board of Canada,⁵ indigenous people accounted for only 2.5% of self-employed Canadians. The report acknowledged that entrepreneurship within indigenous communities, such as the Yellowknives Dene First Nation communities, is an excellent means for allowing individuals to fill a community need, share their culture and knowledge, and increase their financial independence. However, the research also highlights the many obstacles indigenous people face, particularly in remote northern communities. These challenges include insufficient capital, poor business valuations, small customer base, limited to nonexistent infrastructure, and lack of skills and training resources.

Some progress is being made to support local entrepreneurs; however, more can be done. For example, in October 2019, two indigenous entrepreneurs from the NWT started a nine-month program through EntrepreNorth, to help them gain core skills needed to start up on-the-land tourism ventures and expand their businesses.⁶ The Federal Aboriginal Entrepreneurship Program (AEP) also supports Indigenous enterprises by providing access to business opportunities and access to capital streams.⁷

⁴ Government of Northwest Territories Tourism Research, [Yellowknife Airbnb Information](#), 2019

⁵ Government of Northwest Territories Tourism Research, [Yellowknife Airbnb Information](#), 2019

⁶ CBC, [9 Indigenous entrepreneurs selected for support by EntrepreNorth](#), 2019

⁷ Government of Canada, [Aboriginal Entrepreneurship Program: Access to Business Opportunities](#), 2020



Impact of COVID-19

The implications of COVID-19 for the tourism sector at a global, national, territorial and local level have been unprecedented. During the initial stages of the virus, the temporary closure of borders and enacting of social distancing measures ground a previously booming sector to a halt. For example, data published by NWT Tourism estimates that as of the end of March 2020, the territory lost around \$18 million in direct visitor spending. Furthermore, the industry body estimates that an additional \$170 million will be lost by the end of December 2020.⁸ As of November 2020, visitors are allowed to enter the NWT provided they fill out a 14-day mandatory self-isolation form in one of the designated communities.

Compared to other Canadian destinations, Yellowknife and Dettah and Ndilo were among the first regions to be significantly impacted by the virus due to the strong reliance on East Asian, particularly Chinese visitors, where the pandemic was first identified.

Key Funding Initiatives

In the months after COVID-19 first and lockdown measures were enacted (March to June 2020), the GNWT and federal governments introduced various programs aimed at supporting operators during the economic downturn. For example, as of September 2020, over \$400 million was provided by the Government of Canada in different stages through the Indigenous Tourism Association of Canada (ITAC), to support indigenous businesses. \$16 million in funding was directly focused on supporting indigenous tourism operators⁹.

From an entrepreneur and tourism perspective, the GNWT has also allocated additional funding under the Support for Entrepreneurs and Economic Development Policy (SEED) to help local entrepreneurs and small businesses survive during the pandemic.¹⁰ The City of Yellowknife and Yellowknives Dene First Nation are also continuing to work with the GNWT and Federal Government to access appropriate support services and promote local business needs. It is important to note that as the situation and relevant support services are constantly changing, the information above indicate essential programs by the relevant government organizations and is not an exhaustive list.

Opportunities for Recovery

The road to recovery for the NWT, City of Yellowknife and Yellowknives Dene First Nation's tourism sector remains uncertain and may take time to rebound fully. The following section of this report lists opportunities for recovery based on recommendations by the federal and territorial governments, industry experts and international best practices.

⁸ Government of the Northwest Territories, [NWT 'flying through the abyss' as it tries to save tour operators](#), 2020

⁹ Government of Canada, [Government of Canada announces additional support for Indigenous businesses and the Indigenous tourism industry](#), 2020

¹⁰ Government of Canada, [Aboriginal Entrepreneurship Program: Access to Business Opportunities](#), 2020



Leverage Domestic Tourism

As domestic border restrictions begin to lift, there is potential for the Northwest Territories to focus on promoting domestic tourism. This concept of a “staycation” has been gaining traction globally, with many international governments urging residents to explore their own countries backyards and communities for the foreseeable future. Yellowknife, along with other northern communities, is competitively positioned due to its relatively low traffic and COVID-free status, which can serve as a persuasive advertisement in attracting domestic visitors. The GNWT is already considering this action, as seen by the June 4th, 2020 announcement that they plan to allow residents of Nunavut to travel between the territories without having to self-isolate for the mandatory 14-days.¹¹

Embracing Collaboration

To successfully recover from the implications of COVID-19, the City of Yellowknife and Yellowknives Dene First Nation must work collaboratively with other tourism partners to create a realistic tourism recovery strategy. As part of this strategy, ensuring there are limited barriers for consumers to purchase travel should be prioritized. As should ensuring public health conditions of entry are clear and easily accessible.

At the operator level, it is also crucial that businesses begin to form partnerships and work together, whether this is for marketing activities, product improvement, or cost-sharing. By collaborating, these businesses will create an even more robust tourism offering for when visitors return.

Case Studies

These case studies reflect some initial COVID-19 recovery ideas and were researched early in the project. These may now be outdated due to resurgences in COVID-19 in many countries globally.

International Case Study: Iceland to Open for International Tourists

Iceland lifted international travel restrictions on June 15th, 2020.¹² The country is giving passengers from select countries arriving in Iceland to choose between being tested for COVID-19 or self-quarantine for two weeks. The first COVID test is at the border on arrival and the second by the primary healthcare service 5-6 days later. In between the 2 tests, arrivals must go into quarantine.

► Relevance for the City of Yellowknife and Yellowknives Dene First Nation

Iceland is relatively similar to the NWT in terms of geographic remoteness and the limited number of COVID-19 cases. Overall, the City of Yellowknife and Yellowknives Dene First Nation could lobby the GNWT to implement such a trial system.

¹¹ Government of Canada, [Aboriginal Entrepreneurship Program: Access to Business Opportunities](#), 2020

¹² Iceland Tourist Board, [Lifting of Travel Restrictions to Iceland – Guidelines to Tourism Companies](#), 2019



International Case Study: Japan, Sicily and Cyprus to pay visitors to visit

Note: This case study was written before the second wave in many locations. Before implementing, further research is suggested to investigate effectiveness of strategies.

Several destinations have experimented with unique ways to attract visitors. For example, Japan looked to boost domestic tourism by subsidizing a portion of travel expenses once the coronavirus outbreak is brought under control. Similarly, in May, 2020 Sicily said it was willing to pay part of a travellers' post-coronavirus trip, half of their airline ticket and one out of every three hotel nights.¹³ All entry to museums and archaeological sites will also be free. On the other hand, Cyprus has pledged to cover all costs for travellers who tests positive for the coronavirus while on vacation.

► Relevance for the City of Yellowknife and Yellowknives Dene First Nation

While some of the above measures may seem bold, the underlying concept of spending money to entice visitors back to the City of Yellowknife and Yellowknives Dene First Nation is an important observation. As destinations begin to open up, Yellowknife will be hard-pressed to compete with all the other domestic and international destinations desperately seeking visitors. To stand out from the crowd, a financial incentive similar to those explained above could hold considerable merit.

International Case Study: Visit Harghita to offer an online guide of the region

To protect visitors and promote potential bookings, Harghita County in central Romania has created an online guide showcasing their destination. Tourists can now virtually visit museums, explore local salt mines in 3D and listen to audio guides about the main tourist attractions in the official mobile application. Overall, the region's strategy is to "Plan now and visit later!".¹⁴

► Relevance for the City of Yellowknife and Yellowknives Dene First Nation

There is an opportunity for the partners to collaborate to create a captivating virtual visitor experience. This tool would allow visitors to virtually explore the stunning Aurora Borealis, learn about the unique Yellowknives Dene First Nation culture, and find out more information about the best way to book a trip. The advantage of creating a tool like this is that it has long term value for the region even when the implications of COVID-19 begin to fade.

¹³ Washington Post, [These destinations will basically pay you to come visit during the pandemic](#), 2020

¹⁴ Visit Harghita, [Visit Harghita from home](#), 2020



Mining Sector

Pre COVID-19 – An Industry in Decline

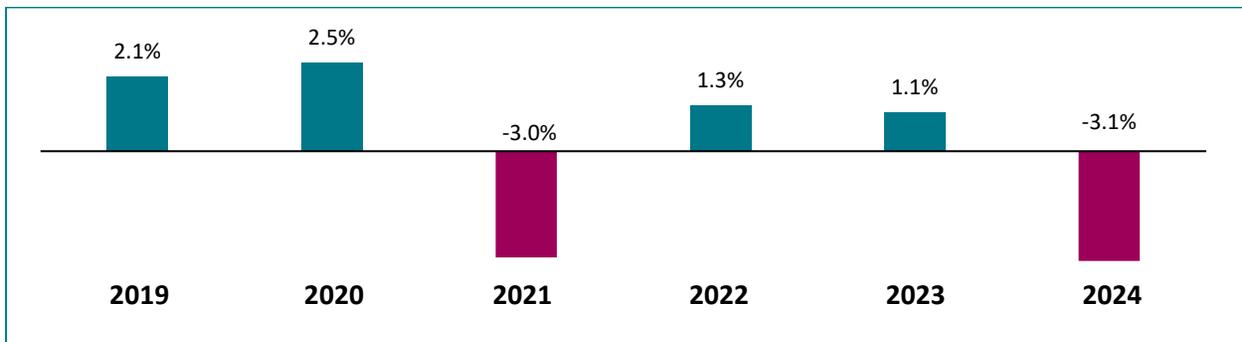
Mining has long been a core economic driver for the NWT economy, with the City of Yellowknife and Yellowknives Dene First Nation heavily relying on the industry for employment and tax revenue. Before COVID-19, the industry was in a state of decline, with the Conference Board of Canada predicting a bleak economic outlook over the coming five years. The Territories' diamond mines had passed peak production, and there was a shortage of replacement projects¹⁵.

At the time of the report, two of the three diamond mines (Diavik and Gahcho Kué) were slated to close within the next decade. Ekati had planned to continue to operate into the late 2030s if the proposed open-pit was approved. The report also predicted a shift in mineral extraction from gold mining to metals (e.g. zinc and cobalt), intending to make electric batteries for cars.

The predicted decline in the mining sector was expected to harm Gross Domestic Product (GDP) growth over the following five years, with estimated growth rates of only 2% for the first two years and several years of negative growth (see Figure 5). As mining is a core sector for jobs within the region, the predicted slowdowns were expected to drastically harm the local economy and put additional strain on government finances. Support sectors, such as construction, were predicted to be hit hard with declines of up to 40% by 2040.

For the Yellowknives Dene First Nation, mining is equally crucial, with many jobs relying on the sector. Det'on Cho Management LP is a major employer with between 600-800 employees (80% of whom are northern) working in 15 companies across the region. The Corporation, which generated more than \$56.5 million in revenue in 2019, is heavily reliant on the local mining sector to fuel growth for most of its 15 companies. As of the publication of their 2019 annual report, the corporation was relatively positive about the region's economic outlook.

Figure 5: Real GDP Growth Forecast – NWT



Source: Adapted from the [Conference Board of Canada](#), 2019.

¹⁵ Conference Board of Canada, [Territorial Outlook Economic Forecast: Summer 2019](#), 2019



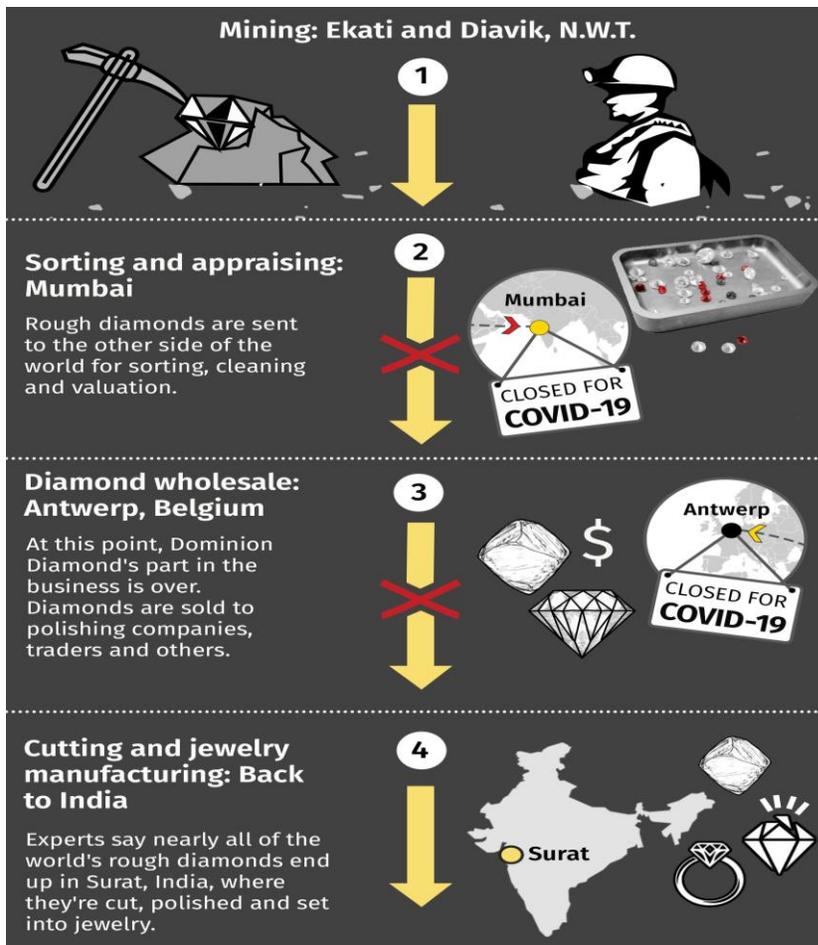
Post COVID-19 – An Industry in Distress

Update: As of the 9th of October, the proposed \$166 million sale of the Ekati mine by Dominion Diamond has been canceled due to an impasse in negotiations. No other bids have been disclosed at this time.

In the aftermath of COVID-19, one of the most concerning issues for the Yellowknife region will be the potential closure of the Dominion Diamond Mine. The company, which owns the Ekati mine and has a 40% stake in Diavik, faces financial ruin due to a collapse in its cash reserves. The company currently has over \$1.2 billion US in debt and is actively trying to prevent closure by refinancing its debt to keep the mines running¹⁶.

COVID-19 has had a severe impact on the global diamond industry, with closures along Dominion’s supply chain leaving it with \$180 million US in unsold diamond inventory (see Figure 6). The implications of the pandemic, combined with a decade of falling diamond prices (nearly by a third), a glut on the market and the rise of synthetic diamonds, means the industry overall is at risk.

Figure 6: COVID-19 Impact on the Global Diamond Supply Chain



Source: Adapted from [CBC News](#), 2020

¹⁶ CBC News, [The downfall of Dominion Diamond](#), 2020



As a key employer, many residents are concerned about the implications for jobs if the mines close. Furthermore, Det'on Cho Management LP is Dominion's largest northern creditor, owed about \$5 million. Although a considerable amount, Det'on Cho Management LP, is more concerned about the long-term implications if mines in the region close, with most businesses and local employment relying on the sector.

Key Challenges and Opportunities for Growth

Gold and, more recently, diamond mining have been core pillars of the NWT economy over the past two decades. However, in the face of scheduled mine closures over the next ten years, mining exploration being below historic highs, and the Mackenzie Valley Pipeline Project not advancing to production, it is evident sector diversification is required. It is important to note that work is currently underway to explore conservation efforts, as is highlighted in the Northwest Territories Economic Opportunities Strategy and the local Yellowknife region.¹⁷ The following lists key issues and potential opportunities for diversification within the mineral sector over the coming years.

Promoting Exploration

Many challenges that mineral companies face originate from conflicts at the exploration stage, according to research conducted for the GNWT by Andrew Bauer.¹⁸ Clauses for exclusive exploration rights already exist within the NWT (e.g. acquisition and prospecting permits), but more work can be done. Potential reforms could include better pre-screening of companies, greater consultation at the exploration phase and allowing for community input on claims that raise concern.

Furthermore, investigating regulatory reform regarding the incentives provided for exploration could be conducted. For example, many claims can be delayed for years and poor transportation infrastructure limits companies' ability to conduct exploration. Greater financial incentives could potentially be investigated depending on the economic climate.

Relevance for the City of Yellowknife and Yellowknives Dene First Nation

By lobbying and working more closely with the GNWT, both the City and First Nation could significantly benefit from changes in regulation that result in more business activity in the sector.

Land Rights

Another barrier preventing sector growth is regulatory uncertainty regarding land claims, which discourages exploration. The finalization of the Akaitcho land claim proceedings, which were started in the early 2000s, will help to attract potential investors within the mineral sector and support Yellowknives Dene First Nation's economic diversification.¹⁹

Relevance for the City of Yellowknife and Yellowknives Dene First Nation

Finalizing land claims will help Yellowknives Dene First Nation develop other areas of their economy. For example, the development of affordable housing and the investigation of a joint marina.

¹⁷ Government of the Northwest Territories, [Economic Opportunities Strategy](#), 2019

¹⁸ Andrew Bauer, [NWT Mineral Review and Benchmarking](#)

¹⁹ CBC News, [Akaitcho process expected to be finalized in a year, says negotiator](#), 2019



Clean Energy Diversification

With the declining outlook for the mining sector, there is a growing potential to explore diversification into the clean energy sector. David Connelly, a community relations person with Terra X minerals and a board member at Avalon Rare Metals, believes that as more mining companies join carbon disclosure programs, there will be increased pressure to source clean energy.²⁰ To continue to attract investments within the mining sector over the existing long-term, companies must start to bring clean power to the north. Industry support by the City of Yellowknife and Yellowknives Dene First Nation is essential to making progress in this area.

In early 2020, there was also support from an NWT MP for the Green New Deal. An NDP initiative, the Green New Deal legislation in Canada seeks to achieve net-zero greenhouse gas emissions and create new, high-wage jobs for all Canadians. It calls for a 10-year national mobilization that will build resiliency against climate-related disasters and meeting 100% of the power demand in Canada through clean, renewable and zero-emission energy sources.²¹

Relevance for the City of Yellowknife and Yellowknives Dene First Nation

Potential to lobby the GNWT on clean energy diversification via support for green initiatives.

Agriculture, Fur and Fisheries Sector

Sector Overview

Agriculture

Agriculture forms a small but essential part of the regional economy. The local food production sector has grown dramatically in the last decade, and the agriculture sector in total generates about \$8-10 million in income per annum. As with many communities, Yellowknife is highly reliant on imported foods from other parts of Canada and the world. Food security concerns have been further highlighted by poor local infrastructure to support agricultural and harvesting activities, a global economy that is prioritizing agricultural control out of the hands of local farms, rising income inequality, food prices and the growing threat of climate change. All of these factors have further accelerated food prices increases, with research by NWT Bureau of Statistics²² in 2017 finding that the average household in Yellowknife spends \$11,690 per year on food, which is \$3,163 more than the average Canadian household (Figure). Agriculture in the NWT encompasses a range of food and activities, including growing fruits and vegetables, composting, farming, gathering wild herbs and plants for food and medicinal purposes, raising livestock and harvesting honey.

From an economic perspective, this reliance on agricultural imports is largely negative for the local economy, as the money spent on food products leaves the community, in addition to the long-range carbon impacts of extended supply chains. This reliance is why there has been a push from the GNWT,

²⁰ My Yellowknife Now, [Mining industry in dire straits, asks for city support](#), 2019

²¹ House of Commons Canada, [Notices of Motions – Public Bills \(Commons\)](#), 2019

²² NWT Bureau of Statistics, [Household Expenditures](#), 2017



City of Yellowknife and Yellowknives Dene First Nation to develop strategies for the agriculture sector. These strategies reflect the significant economic potential locally owned and operated food and agricultural businesses, including fisheries, can have when money is kept within the local economy. The multiplier effects continue to circulate, adding value to other businesses, which, in turn, increases the resiliency of the regional economy. The recent pandemic has further heightened the fragility of global food supply chains and the growing need and desire by residents to increase local food resiliency. Overall, the territory has 32 community gardens and 25 community greenhouses, according to the Department of Industry, Tourism and Investment's website.²³

Figure 7: Average Household Expenditure, by Component Summary Statistics: 2017 Canada, Northwest Territories and Yellowknife

Average Household Expenditure	Canada (\$)	Yellowknife (\$)
Total expenditure	86,070	132,772
Total current consumption	63,723	93,354
Food	8,527	11,690
Shelter	18,637	30,146
Household operation	4,827	6,963
Household furnishings and equipment	2,314	3,441
Clothing and accessories	3,430	4,831
Transportation	12,707	18,966
Health care	2,579	2,384
Personal care	1,300	1,788
Recreation	3,986	6,910
Education	1,777	1,194
Reading materials and other printed matter	158	246
Tobacco products and alcoholic beverages	1,497	2,040
Games of chance (net)	200	186
Miscellaneous expenditures	1,785	2,566

Source: Adapted from the [NWT Bureau of Statistics, 2017](#).

Commercial Fishing

Production from the commercial freshwater fish industry has been steadily declining since its peak in 2001/2002. However, the industry has experienced an increase in sales of 61 percent over the previous year and was valued at \$817,000. The NWT supplies approximately one percent of Canada's freshwater fish. Whitefish is commercially harvested from Great Slave Lake and makes up 81 percent of the lake's total harvest. Whitefish volumes are increasing over recent lows.

Fur Trapping

Fur trapping also is an important income source for local indigenous peoples and has seen a spike in demand in source markets such as Russia and China. For example, muskrats are in surprisingly high demand, and on average, the price per pelt has doubled since 2009. There are opportunities for Yellowknives Dene First Nation to continue to expand its fur-trapping business.

²³ NWT Industry, Tourism and Investment, [Agriculture Sector Profile](#)



Review of Key Territorial and Local Agricultural Strategies

As part of this economic review, analysis of key agricultural sector strategies was conducted to understand current strategic thinking in the sector and which additional opportunities should be pursued.

NWT Agricultural Strategy 2017 – 2022

The need to develop an inaugural agricultural sector strategy was identified as a key priority for the region within the 2013 NWT Economic Opportunities Strategy (EOS).²⁴ In 2017, the NWT Agricultural Strategy 2017 – 2022 strategy was then published and painted a vision of “increasing the diversity, amount and value of foods and goods produced through the development of a safe, self-reliant, environmentally sound agriculture sector, for the betterment of all communities and residents in the Northwest Territories.” It included six pillars of action that focused on developing and supporting the needs of a commercial sector engaged in food production, processing and secondary industry development support (Figure 8).

Figure 8: Vision for the Food NWT Production Industry



Source: Adapted from the [GNWT Agricultural Strategy, 2017](#).

The strategy references the importance of respecting the indigenous values and community and how land management is strongly linked to indigenous land claim proceedings. It urges municipalities across the region to collaborate with local indigenous groups (e.g. Yellowknives Dene First Nation) to co-create agricultural opportunities over the long term. The report also highlighted the need to enhance local training resources to ensure talent has the knowledge to capitalize upon agricultural opportunities. Furthermore, an increased partnership between the GNWT and local bodies (e.g. the City of Yellowknife and YDKFN) is stressed as critical to ensuring action occurs in the region. Overall, the key takeaway is that partnership and better training will help fuel sector growth, leveraging the \$1.21 million, which has been allocated annually under the Canadian Agricultural Partnership to support the growth of agriculture in the NWT. Funding is also accessible via the Northern Food Development Program (fish and

²⁴ Northwest Territories Economic Opportunities Strategy, [Connecting Businesses and Communities to Economic Opportunities](#), 2013



agriculture program funding); and the Support for Entrepreneurs and Economic Development (SEED), a suite of programs and supports for general business development including the agriculture sector.

The City of Yellowknife Food and Agricultural Strategy 2019 (GROW)

Initiated in 2018, the Strategy aimed to establish a policy and planning framework to increase food and agricultural activities within the city for the next 10 years. The document builds on the vision outlined within the Yellowknife Food Charter²⁵, created by the local farmers market, of creating a *“just and sustainable food system in Yellowknife rooted in a healthy community, where everyone has access to adequate and affordable nutritious food; more food is grown and harvested locally; and food production policies and infrastructure are in place to support an economically viable, diverse and ecologically sustainable local food system.”* Five key goals are included in the report, as illustrated in Figure 9.

Figure 9: Key Goals outlined in GROW



Source: Adapted from the [City of Yellowknife Food and Agricultural Strategy, 2018](#)

The document provides excellent recommendations to kick start agricultural development within the city. Notable recommendations include supporting urban agricultural development through changes in land-use policies, continued support of greenhouse development, pushing learning and development opportunities for residents, and investigating the potential of a food incubator or kick starter program within the city.

To truly achieve the mission of a ‘fair and sustainable food system,’ partnership developments on some of these initiatives must occur once the Akaitcho Dene First Nations Land claim proceedings are completed. Additionally, there are opportunities for developing educational courses within the city in partnership with the local college.

²⁵ Yellowknife Farmers Market, [Yellowknife Food Charter](#), 2015-16



Strategy for Revitalizing the Great Slave Lake Commercial Fishery (2017)

Within the commercial fishing sector, there has been some progress made at the territorial level but limited progress locally. In 2017, the NWT Department of Industry, Tourism and Investment created a new fishing strategy that aims to triple fish output by 2021.²⁶ It describes steps, actions, and investments, to be implemented over five years to restore the NWT’s once-powerful Great Slave Lake commercial fishery. The strategy recommends replacing the fish processing plant in Hay River within the next three years. It also suggests setting up packaging stations in Yellowknife and Fort Resolution and encouraging fishing through the winter. Overall, this strategy has the potential to have positive economic downstream effects for the City of Yellowknife and the communities of the Yellowknives Dene First Nation (e.g. increased employment, possible creation of auxiliary service businesses).

Sector Support Services

Agriculture

Within the NWT, there are several support services in place to help developing businesses within the agriculture sector. Note, this is not an exhaustive list as other funding sources continually come online. Before applying for funding, it is suggested further research is conducted. Possible sources include:

Support Services/ Organizations	Description
Northern Farm Training Institute, Hay River	<p>The institute is an experiential farm school that provides immersive training aimed to empower people through local food. The organization offers sector training for youth, indigenous populations and business leaders to develop in the sector, including:</p> <ul style="list-style-type: none"> ▪ Northern Diversity in Agriculture Program ▪ Internship Training ▪ Introduction Courses ▪ Youth Gardens ▪ Farm Campus
Northern Food Development Program	<p>The goal of the program is to increase local food production and availability of northern food products for northern consumers. The program offers support across all food production sectors, including agriculture, fisheries, wildlife harvesting and non-timber forest products.</p>
Aurora College, Yellowknife	<p>The local Yellowknife College offers an Environment and Natural Resources Technology Diploma to gain managerial skills in environment, land, water, fisheries, forest and fire management, and wildlife.</p>

²⁶ GNWT, [Strategy for Revitalizing the Great Slave Lake Commercial Fishery](#), 2017



Support Services/ Organizations	Description
Nutrition North Program	<p>Nutrition North Canada (NNC) is a Government of Canada program that helps make nutritious food and some essential items more affordable and accessible. NNC helps eligible northern communities in 3 ways:</p> <ul style="list-style-type: none"> ▪ <i>The NNC subsidy</i> - subsidizes a list of nutritious eligible foods, as well as certain non-food items such as diapers and soap, hand-sanitizers ▪ <i>Harvesters Support Grant</i> – Supports local indigenous partners to increase their access to traditional foods by reducing the high costs associated with traditional hunting and harvesting. Provides \$40 million over 5 years and \$8 million per year ongoing, to Indigenous governments and organizations representing eligible Nutrition North Canada communities ▪ <i>Nutrition education initiatives</i> – Supports culturally appropriate retail and community-based nutrition education activities in all eligible isolated northern communities.
Support for Entrepreneurs and Economic Development Program (SEED)	<p>Provides funding to promote and support the NWT private business sector. Funding is available under 6 areas, including Entrepreneur Support, Sector Support, Community Economic Development, Micro Business, Business Intelligence and Networking, Strategic Investments, Support for Film and Prospecting Support. Funds have been reallocated in the wake of COVID-19 to support local businesses better.</p>
Ecology North	<p>Ecology North is a charitable, non-profit organization based in Yellowknife that provides environmental decision-making on an individual, community and regional level. One of the core focuses of the program is on local food production. They provide a range of research, education support programs and manage projects helping promote the sustainable food sector for the NWT.</p>
Canadian Northern Economic Development Agency (CanNor)	<p>CanNor works with Northerners and Indigenous peoples, communities, businesses, organizations, other federal departments and other orders of government to help build diversified and dynamic economies that foster long-term sustainability and economic prosperity across the territories – Nunavut, Northwest Territories and Yukon. There are several funding programs available such as the the Northern Business Relief Fund (NBRF) and Inclusive Diversification and Economic Advancement in the North (IDEANorth).</p>

Key Challenges and Opportunities for Growth

Impact of COVID-19

The recent pandemic has highlighted the fragility of global food supply chains, particularly in remote northern communities such as the City of Yellowknife and Yellowknives Dene First Nation. Jackie Milne, president of the Northern Farm Training Institute (NFTI) in Hay River, said if any of Canada's major import markets decide to stockpile their agricultural goods during the pandemic, the North could see immediate effects²⁷. According to local farmers, the pandemic has also ramped up local eagerness to grow more locally and become more self-reliant.

²⁷ CBC, [NWT. farmers say now is the time to teach people how to grow their own food](#), 2020



Increasing Online and Offline Education

The pandemic has highlighted the benefits of online learning both in and outside of the workplace. With students and workers prevented from gathering together in groups, most education institutions have taken to developing or enhancing online learning models to disseminate information. From an agriculture perspective, this opens the door for the City and First Nation to consider hosting online zoom education workshops and creating short, digestible online learning courses for residents to learn more about getting started in the sector. These courses could include everything from how to build soil to the ideal times to plant and harvest crops throughout the season (e.g. MakerSpace hosted an open house about how to plant a potato garden). Once COVID-19 restrictions are lifted, this online course activity could complement formal training sessions in person for both Yellowknife and Yellowknives Dene First Nation communities.

Greater education collaboration with the Northern Farm Training Institute (NFTI) and Aurora College to create streamlined agriculture courses for both Yellowknife residents and First Nation members is an important step forward.

Fisheries Expansion

Creating a strong and sustainable economy over the long term requires diversification into sectors such as agriculture, fur and fisheries, and the creation of an industry that has export potential. Fisheries offer this for the local region. As highlighted earlier, commercial fishing in the Northwest Territories centres on Great Slave Lake, with Yellowknife and Hay River serving as hubs. There is potential to expand upon this sector through this strategy, particularly by leveraging partnerships with Yellowknives Dene First Nation upon completion of the current land claim proceedings. The current NWT fishing Revitalization Strategy's plan targets 40 percent of the Great Slave Lake production in the NWT market. According to the report, the Hay River plant is close to full capacity, and so there could be potential for Yellowknife to establish its plant to boost regional processing capacity. Similarly, establishing more packaging stations in Yellowknife would complement the existing processing facility in Hay River. Attracting public investment is critical for the success of the fisheries industry expansion, and the City of Yellowknife should work in conjunction with Yellowknives Dene First Nation and the GNWT to ensure there are low barriers to entry for business owners.

Leveraging Collaborative Partnerships

A gap identified within the literature review is an economic collaboration with local indigenous groups (e.g. Yellowknives Dene First Nation) to create partnerships for industry development. The near completion of the land claim agreement offers opportunities for development and the ability to provide greater support to local entrepreneurs to expand hunting and trapping businesses for the fur trade.



Appendix C: Long List of Economic Opportunity Areas

During the initial stages of the project a list of 10 economic opportunity areas were identified. These sectors formed the basis of the prioritization workshop conducted with the Yellowknife Dene First Nation and City of Yellowknife Staff and is reflected in the final strategy document.

The Criteria Used to Assess the 10 Opportunities



Alignment with Existing Strategies: Areas of collaboration were assessed against existing reports and plans, and each community's current economic development strategy. This was to ensure that each organization would have existing capacity in that area so that any partnerships or collaborations would be supported through existing staff and resources.



Ease of Collaboration: This criteria assessed whether the collaboration area would be easy or difficult to execute. In some cases, this meant that the collaboration area would have easy and short-term wins or whether the collaboration area requires limited resources to execute.



Economic Impact: Through a big-picture lens, this criteria asked whether the given collaboration area would provide jobs and investment to the region, and at what scale. Mining, for example, holds a score of 10 for economic impact, as it reflects a significant economic impact on the Yellowknife area.



Social/Cultural Impact: It is of utmost importance that this strategy reflects the importance of social and cultural relevance for First Nation members. The Yellowknives Dene First Nation Economic Development Strategy emphasizes the need for cultural relevance in economic development initiatives, and this was also reflected throughout consultation for this strategy. Cementing the cultural identity of the Yellowknives Dene First Nation as the first peoples of the Yellowknife area is a high priority for members.



Potential for Regional Self-Sufficiency: This criteria emerged as a result of COVID-19's impacts on the local economy. The pandemic served to enhance the need for more economic self-sufficiency. Sectors such as food and agriculture were obvious areas of weakness, but it permeated into other industries as well. Thus, it is a consideration when carrying forward joint economic development initiatives.



Alignment with UN Sustainability Goals: Through this project, sustainable development showed itself in a number of ways. For instance, the City-First Nation partnership is built on a commitment to reconciliation, being a sustainable community with high regard for the natural environment. With that in mind, the long list of economic development opportunities were considered against appropriate UN Sustainable Development Goals.



The United Nations Sustainable Development Goals are 17 goals of the 2030 Agenda for Sustainable Development. The Agenda is "a plan of action for people, planet and prosperity." The Agenda and its 17 goals were built on the success of the United Nations' Millennium Development Goals, which were similar calls to action to address the same challenges. The current 17 Sustainable Development Goals (SDGs) dig deeper, addressing the root causes of inequality, and balance the three dimensions of sustainable development: social, environmental, economic (note the parallel to people, planet, prosperity). Yellowknives Dene First Nation and City of Yellowknife are in a position to use this Joint Economic Development Strategy and its underlying partnership to contribute to these global goals.

Figure 10: United Nations Sustainability Goals



For each criteria, there is an explanation provided in the middle column that assesses the opportunity against it. In the third column, a score is provided. Scores should be interpreted as follows:

Figure 11: Criteria Assessment Legend

Score	Legend
There are barriers to pursuing this opportunity	
Opportunity meets this criteria to a degree, with some considerations and drawbacks	
Opportunity is strongly aligned with this criteria	



1. Land Development

Alignment with Existing Strategies

Increasing availability of lands for residential, commercial and industrial use was identified in each community's economic development strategy.



Ease of Collaboration

Much of the land that will be ceded to the Yellowknives Dene First Nation is within current city boundaries, so the City and First Nation could develop servicing and infrastructure agreements. These may be complicated, but they are an obvious opportunity for collaboration between the two governments.



Economic Impact

Co-development of land could have significant implications for the First Nation and City's ability to attract investment, create jobs and generate revenue in the medium and long-term.



Social/Cultural Impact

Co-developing land will give Yellowknives Dene First Nation the ability to utilize its land assets and generate revenue from them, which will likely have positive social impacts.



Potential for Regional Self-Sufficiency

Increased land development will allow for City and First Nation to take further control over development within their boundaries.



UN Sustainability Goals Alignment



Ideal Situation by 2025

Yellowknives Dene First Nation and City of Yellowknife will have an inventory of investment-ready land available for industrial, commercial and residential development.

Potential Initiatives:

- Shared or coordinated infrastructure services
- Shared investment in land development



2. Local Business and Entrepreneur Support



Alignment with Existing Strategies

Each community identified supporting local businesses as a high priority. This includes cutting red tape. Some entrepreneurs identified dissatisfaction with the development/building permit process (a satisfaction score of 59.1% in the business survey). Yellowknives Dene First Nation members identified that navigating business licencing and health and safety permits, especially for food businesses, could be a challenge that excludes Yellowknives Dene First Nation members from entrepreneurship.



Ease of Collaboration

Collaborating on business development and entrepreneur support services is an area that would be relatively simple for the City and First Nation to execute jointly. However, service delivery for Yellowknives Dene First Nation members should be tailored to the language and cultural needs. This could be a collaboration between the Akaitcho Business Development Corporation and the City of Yellowknife. Public survey results showed that respondents felt this would be an easy area of collaboration (see Technical Report).



Economic Impact

In the short-term, supporting local businesses has an incremental economic impact. In the long-term, it can mean significant job creation as locally owned and operated businesses expand in the region.



Social/Cultural Impact

Increasing access to entrepreneurship can have empowering impacts on a community. It also fosters a culture of local pride and ownership in the local economy.



Potential for Regional Self-Sufficiency

Very high. Increasing local entrepreneurship will bring more of the regional economy into the Yellowknives Dene First Nation and City's sphere of direct influence.



UN Sustainability Goals Alignment



Ideal Situation by 2025

Yellowknives Dene First Nation communities and the Yellowknife share a culture of entrepreneurialism and small businesses are opening and expanding. People choose entrepreneurship as a viable career path.

Potential Initiatives:

Jointly run accelerator or incubator centre. Jointly delivered business development services, with cultural and language resources for First Nation entrepreneurs.



3. Tourism

Alignment with Existing Strategies

Tourism was identified in both community's economic development strategy as a high priority.



Ease of Collaboration

Delivering cultural tourism experiences is an excellent opportunity to collaborate on short-term wins. Examples include culturally appropriate joint branding and marketing, jointly delivered tourist information services that give visibility to Yellowknives Dene First Nation culture and history. Public survey respondents felt this would be the easiest area of collaboration out of those identified between both economic development strategies (See Appendix D).



Economic Impact

Tourism can be a significant economic driver, but it is placed at a mid-level score here due to the uncertainty of COVID-19 travel restrictions in the near and medium-term.



Social/Cultural Impact

Tourism delivery is an excellent way to provide visibility and education on Yellowknives Dene First Nation culture, which has been historically misunderstood in the region. Increased visibility and respect for Yellowknives Dene history and culture will likely positively impact race relations and cultural wellness in the region.



Potential for Regional Self-Sufficiency

Tourism relies on outside visitors, which can be severely impacted by external economic forces that neither the First Nation nor City have direct influence over (e.g. pandemic). However, pre-COVID-19, it was a core pillar of the local economy and could recover once borders reopen.



UN Sustainability Goals Alignment



Ideal Situation by 2025

The region has a thriving tourism industry that attracts domestic and international travellers. Tourism messaging places Yellowknives Dene First Nation people, culture and language as central to the region currently and historically.

Potential Initiatives:

- Joint tourism branding initiative and Bilingual wayfinding signage
- Tourism ambassador program that educates tourism operators and cab drivers about Yellowknives Dene First Nation culture in the region, so visitors are properly educated about the history of the region
- Airport branding/welcome display that is culturally and geographically appropriate
- Creation and operation of a marina on Great Slave Lake



4. Housing

Alignment with Existing Strategies

While not an identified priority in the First Nation or City economic development strategies, addressing housing shortages and high costs of living was a persistent theme throughout the engagement.



Ease of Collaboration

The First Nation and the City may have some opportunities to address housing shortages after the Akaitcho Land Claim settlement jointly; however, housing needs for Yellowknives Dene First Nation members and Yellowknife residents may be quite different and require tailored solutions.



Economic Impact

Housing development – perhaps as a joint project led by Det'on Cho Management LP – could lead to local job creation in the short term. It was identified as the highest priority business satisfaction factor in the Business Satisfaction Survey (see Technical Report), which signals that it would greatly improve regional business satisfaction.



Social/Cultural Impact

Sufficient housing is a major determinant of social wellness. First Nation members often have to live outside of Dettah and Ndilo and move into the city due to housing shortages, impacting wellness. Housing for city residents is often too expensive and pushes low-income residents to the margins.



Potential for Regional Self-Sufficiency

There may be an opportunity for Det'on Cho Management LP to develop housing on lands that Yellowknives Dene First Nation will own after the land claim is settled. This could generate revenue for Yellowknives Dene First Nation and increase access to sufficient housing for residents, and build local skill capacity in trades.



UN Sustainability Goals Alignment

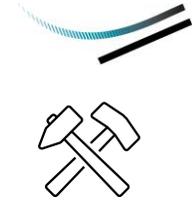


Ideal Situation by 2025

Suitable, affordable housing for all Yellowknives Dene First Nation members and City of Yellowknife residents.

Potential Initiatives:

- Co-development of Akaitcho agreement lands for housing development
- Creation of a joint non-profit housing corporation



5. Mining and Mineral Development

Alignment with Existing Strategies

Each community's economic development strategy identifies mining supply chain opportunities.



Ease of Collaboration

Joint lobbying efforts to upper levels of government for infrastructure development for exploration will be more effective than an uncoordinated effort.



Economic Impact

The mining industry provides the region with an unmatched level of job creation and supply chain opportunities.



Social/Cultural Impact

While the mining industry provides jobs and entrepreneurship opportunities to the Det'on Cho Management LP, it does not necessarily provide direct holistic social or cultural benefits.



Potential for Regional Self-Sufficiency

The mining industry largely relies on external market forces. Local exploration efforts could be spearheaded to improve local self-sufficiency, but total self-sufficiency is unlikely.



UN Sustainability Goals Alignment



Ideal Situation by 2025

Mining and exploration is active and producing new opportunities for the region. Yellowknives Dene First Nation and the Yellowknife are reaping the benefits from all exploration and remediation activities.

Potential Initiatives:

Joint lobbying for exploration and infrastructure.
Business support for supply chain businesses.



6. Food and Agriculture



Alignment with Existing Strategies

Both the City and First Nation identify food and agriculture as high economic development priorities. Yellowknives Dene First Nation prioritizes country food and value-added opportunities that leverage cultural traditions. The City identifies increased support for commercial and urban agriculture.



Ease of Collaboration

First Nation-owned lands, following the Akaitcho land claim settlement, could be utilized for agricultural purposes, which the City of Yellowknife and Yellowknives Dene First Nation could spearhead together. The Yellowknife farmers' market is another easy opportunity for joint collaboration, among others. Joint investment in fisheries is another opportunity.



Economic Impact

While direct job creation would not be immediate nor massive scale at first, increasing entrepreneurialism in food, agriculture and value-added agriculture would have long-term benefits and incrementally create jobs in the region.



Social/Cultural Impact

Food is intrinsically tied to culture and wellness. Increasing local food production, especially traditional food for Yellowknives Dene First Nation members, would create a culturally relevant economic driver in the region for the Yellowknives Dene. It would also address food security issues in the regional overall, which have been identified as a key challenge in the NWT.



Potential for Regional Self-Sufficiency

COVID-19 has highlighted the need to increase food security in the region. Increasing the capacity to produce, process and sell local food could stem some regional food shortages, among other benefits.



UN Sustainability Goals Alignment

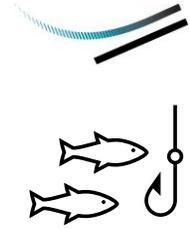


Ideal Situation by 2025

The entire region has secure access to nutritious, affordable, culturally relevant food. The local food system is a contributor to the local economy, and it can withstand supply chain challenges like those seen during the COVID-19 pandemic.

Potential Initiatives:

Joint greenhouse development and other joint urban agriculture initiatives.
Joint development of lands intended for commercial agriculture.



7. Fisheries

Alignment with Existing Strategies

Both strategies identify fishing – commercial and tourism – as an economic opportunity. In the City’s strategy it is grouped under Food and Agriculture. In the Yellowknives Dene First Nation’s Strategy, it is under Traditional Economy. In 2017 the GNWT also released a strategy to Revitalizing the Great Slave Lake Commercial Fishery Industry with opportunities for joint collaboration.



Ease of Collaboration

The First Nation and City of Yellowknife could jointly support the growth of commercial fisheries through entrepreneurship support for fishing, processing and investment attraction activities.



Economic Impact

As an export market, commercial fishing could have a significant economic impact. However, it is unlikely to compete with the mining or tourism sector in terms of jobs created.



Social/Cultural Impact

As a traditional economic activity, the growth of a commercial and tourism fishing industry would have cultural relevance for Yellowknives Dene First Nation members.



Potential for Regional Self-Sufficiency

This activity leverages local resources and contains opportunities for supply chain entrepreneurship. However, it is unlikely it could fully support the local region without aside support.



UN Sustainability Goals Alignment



Ideal Situation by 2025

Commercially caught fish is an large export of the Yellowknife region. The industry provides significant jobs and revenue to the area.

Potential Initiatives:

Jointly attract commercial fishing investment. This could also be an initiative led by Det'on Cho Management LP.



8. Airport Development

Alignment with Existing Strategies

Only the City of Yellowknife identified airport development as a high priority including the need to upgrade YZF airport's infrastructure and establish it as an international airport and warehousing hub. Both the City and First Nation identified cold-weather testing as an economic opportunity.



Ease of Collaboration

The First Nation and City could jointly advocate for international airport status, with border services toward the goal of attracting cold-weather testing and foreign investment. In the long term, Yellowknives Dene First Nation and City could jointly undertake investment attraction activities that market industrial land in Yellowknives Dene First Nation and the city. Clarity is needed on the jurisdiction of airport lands.



Economic Impact

The airport and, by extension, the cold-weather testing it may attract, and other industrial activity could bring significant investment to the region. However, as the City of Yellowknife's economic development strategy describes, steps are required to make the region investment-ready. Any major economic impact would be a long-term goal.



Social/Cultural Impact

Investment attraction activities tied to the airport would likely have limited social or cultural impact in the short-term.



Potential for Regional Self-Sufficiency

This type of economic activity relies on external investment and travel from elsewhere to be successful. Thus, it does not encourage economic self-sufficiency.



UN Sustainability Goals Alignment



Ideal Situation by 2025

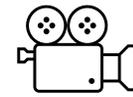
The Yellowknife Airport has full border services and is a destination for international business and tourism travel.

Potential Initiatives:

Jointly advocating for border services and international airport status at YZF.



9. Film



Alignment with Existing Strategies

Film was identified as an 'other opportunity' in the City of Yellowknife's economic development strategy and is identified briefly as a small business opportunity in the Yellowknives Dene First Nation's economic development strategy for independent filmmakers.



Ease of Collaboration

The GNWT leads investment attraction, so there may be opportunities to be more involved in that process in a unified way. The City and First Nation could collaborate on connecting local businesses with opportunities that arise from film activity in the region.



Economic Impact

When film activity does come to the region, it can have significant economic benefits for local business owners and local temporary jobs. It is given a midlevel score due to its current state, which has been stalled by border closures due to COVID-19.



Social/Cultural Impact

Some film activity does have significant cultural and social impacts. As a creative field, its presence could empower local youth to pursue careers in film and further awareness of the region and its culture.



Potential for Regional Self-Sufficiency

The film industry, at present, relies largely on international or domestic air travel. Since COVID-19, many film productions were postponed in the region. The best bet to encourage this type of economic activity would be building capacity locally through education.



UN Sustainability Goals Alignment



Ideal Situation by 2025

The Yellowknife region is widely recognized as a northern film hub. Local businesses enjoy the economic benefits that the industry brings to the region.

Potential Initiatives:

Create an inventory of businesses to assist the GNWT film office with local procurement when productions to come to the region.

Work with the GNWT to determine if there is a role for the City of Yellowknife and Yellowknives Dene First Nation to contribute to investment attraction activities.



10. Workforce Development



Alignment with Existing Strategies

Each community's economic development strategy identifies some elements of workforce development or enhancement as a priority, though not directly. The City of Yellowknife has prioritized advocating for a polytechnic university, which is the most direct pathway to workforce development opportunities.



Ease of Collaboration

Workforce development initiatives for Yellowknives Dene First Nation members may need to be tailored to specific cultural needs that may not apply for Yellowknife residents. That said, the Polytechnic would be a major opportunity to partner to advocate for tailored program delivery ²⁸.



Economic Impact

Workforce development initiatives can have a major economic impact when they assist with filling workforce shortages in active sectors. An appropriately skilled local workforce will keep money circulating in the local economy.



Social/Cultural Impact

Increasing access to training for Yellowknife residents and Yellowknives Dene First Nation members would have cultural and social benefits by increasing participation and creating economic empowerment.



Potential for Regional Self-Sufficiency

Workforce development initiatives will increase capacity among the local population, which will have local benefits.



UN Sustainability Goals Alignment



Ideal Situation by 2025

All First Nation members and Yellowknife residents that want employment have access to appropriate training and opportunities. Business and industry operating in the region has access to a skilled local talent pool.

Potential Initiatives:

Jointly advocating for a polytechnic university, with consideration given to appropriate programming for industry and employment opportunities in the region, and culturally appropriate programming for First Nation members.

28 See Yukon College, Centre for Northern Innovation in Mining - <https://www.nrcan.gc.ca/sites/www.nrcan.gc.ca/files/mineralsmetals/files/pdf/rmd-rrm/Yukon%20College-%20Centre%20for%20Northern%20Innovation%20in%20Mining.pdf>



Consulting Team/CEDI Future Directions Workshop

A workshop was hosted on September 10, 2020, from 9:00 a.m. to 4:30 p.m, with 32 people taking part (including participants and facilitators). Due to the threat of COVID-19 and restrictions on travel within the NWT, the workshop followed a blended in-person and virtual model (via Zoom). Stakeholders ranged from high-level leadership positions within the City and First Nation, including the Mayor of Yellowknife and Chief and Council of the Yellowknives Dene First Nation.

The main objectives of the workshop included:

- To engage in ongoing partnership development and growth between Yellowknives Dene First Nation and City of Yellowknife's elected representatives and staff.
- To build partnership capacity to do joint community economic development planning.
- To review the progress of the partnership.
- To identify a shortlist of joint economic opportunities.

The full findings of this workshop including prioritized assessment criteria and opportunity areas can be found in the final joint strategy. Figure 12 and Figure 13 outline some of the discussions from the session regarding the Memorandum of Understanding (MOU) and brainstorming session.

Figure 12: Example Shared Vision Statement Workshop Flipchart Notes

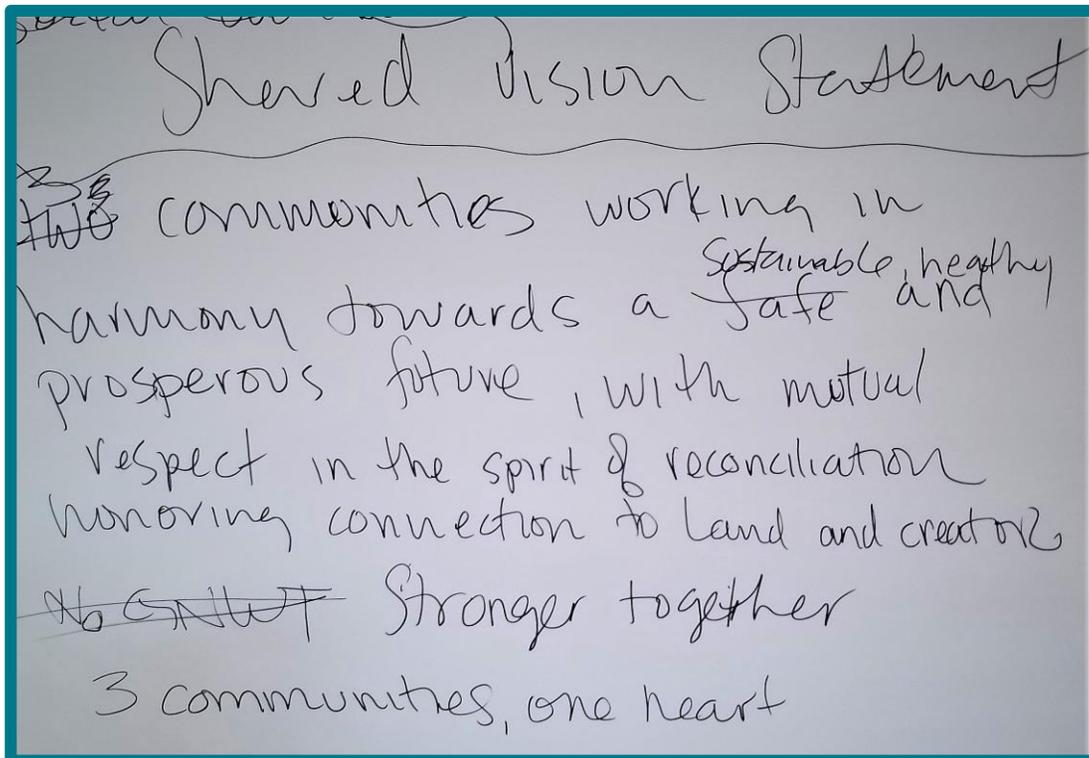
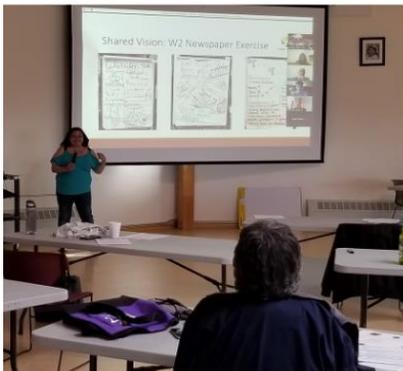
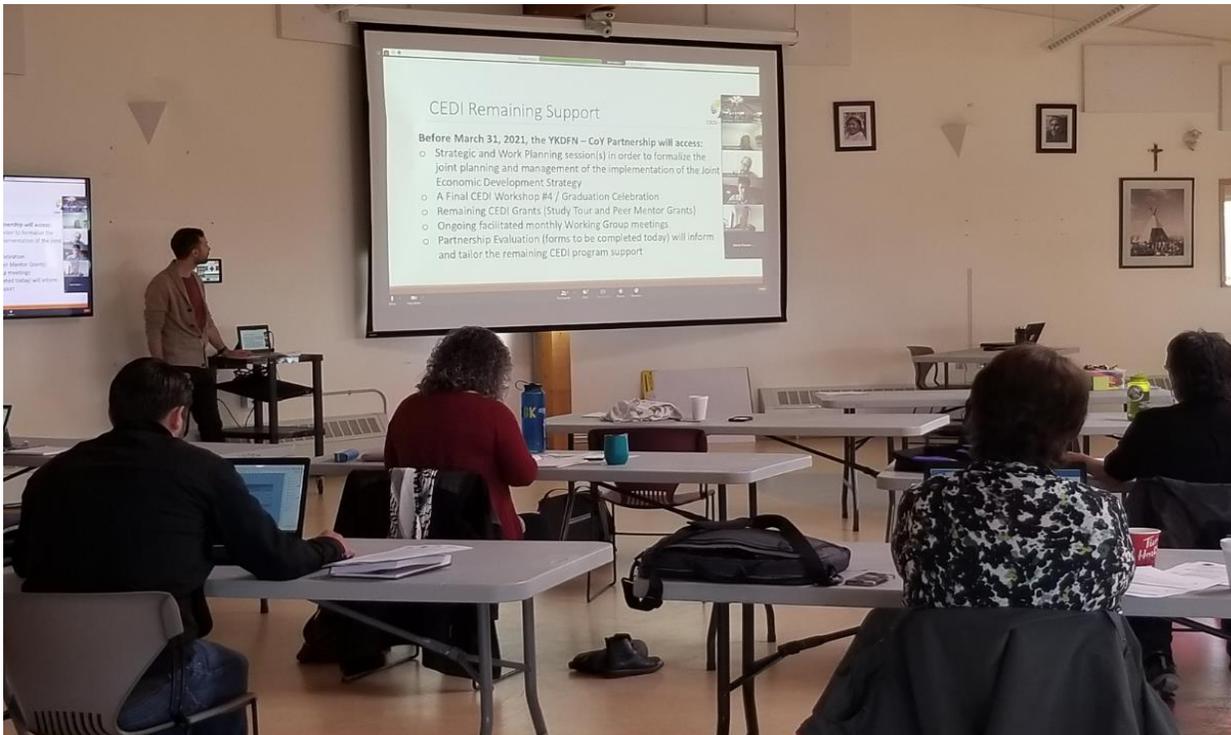




Figure 13: Workshop Highlights





Appendix D: Economic Base Analysis

Summary

The economic base analysis identified key contextual findings of the demographic and economic characteristics of the City of Yellowknife and the Yellowknife Dene First Nation communities of Ndilo and Dettah. The detailed findings, along with tables representing the data, are included below. Some key themes from this detailed analysis which were pertinent to the current study are listed:

- **Yellowknife is a central regional hub** – The overall population growth in Yellowknife comprises of just under half (47%) of the whole of the NWT. The population grew by 6.5% from 2011 to 2018, higher than the NWT average of 5.3% but lower than the national average of 11.3%. Yellowknife has a younger population when compared to Canada (median age of 35.8 compared to 41.4).
- **Housing prices are high** – The median value of dwelling in Yellowknife in 2018 (\$520 421) was 1.4 x more expensive than the rest of the NWT and 1.3 x more expensive than across Canada. Housing prices have increased by 44.7% from 2011 to 2018. The median monthly shelter costs in Yellowknife in 2016 (\$1,683) was \$774 more than Canada.
- **A high proportion of educated individuals in Yellowknife** – In Yellowknife, the proportion of individuals with a university certificate, diploma, or degree at bachelor level or above was 5 percentage points higher than Canada.
- **High levels of household income** – Compared to the Canada and Territory, the total income in Yellowknife is 38% higher than that of the NWT and 139% higher than Canada. Household income also increased by 44% over the 2010 to 2018 period, higher than both the NWT and Canada.
- **The unemployment rate has remained low** – Unemployment has decreased from 2011 to 2018 by 2 percentage points. Compared to Canada, Yellowknife has a lower proportion of self-employed workers (7% compared to 12%) but slightly higher than the NWT (7%).
- **Public Administration, Mining and Tourism are vital economic sectors for employment and business activity** – Comparing Yellowknife to the NWT we were able to determine the industries with a relative advantage based on the density of employment in that sector. The 2-digit North American Industry Classification System or NAICS – which classifies business establishments by type of economic activity – were used to identify sectors with a higher proportion of employment in Yellowknife, compared to the territory. These sectors included: public administration; mining, quarrying, and oil and gas extraction; tourism (including retail trade and accommodation); and professional, scientific and technical services.
- In terms of occupations, Yellowknife experienced the largest growth between 2011-2018 in public administration (282 people) and administrative and support, waste management and remediation services (150 people). Mining, quarrying, and oil and gas extraction and transportation and warehousing saw the largest decrease in net employment (-134 and -196 people, respectively).



Economic Base Analysis – Detailed Analysis

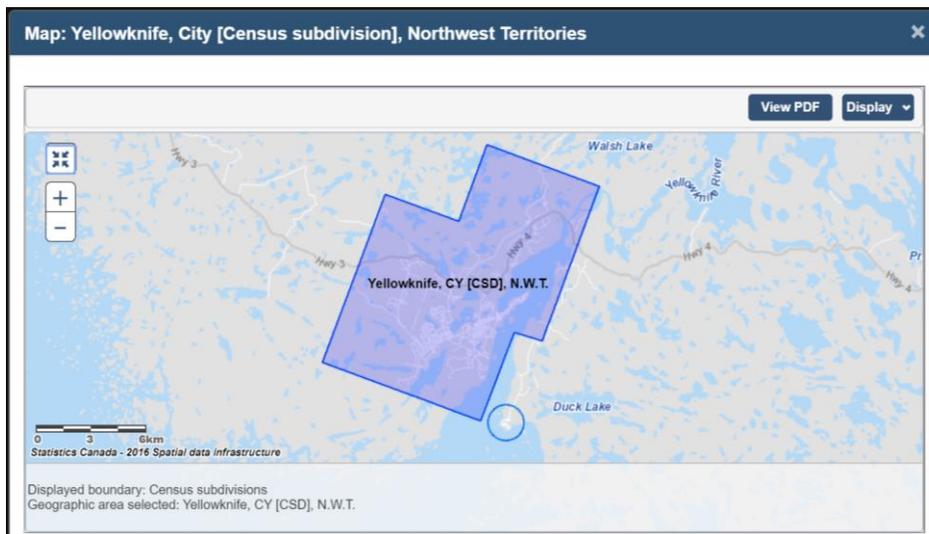
This economic base analysis presents an overview of the socio-economic, labour force and industry composition for the City of Yellowknife and the Yellowknives Dene First Nation.

The results are derived from the following sources:

- Statistics Canada, Census Profile, 2011
- Statistics Canada, Census Profile, 2016
- Manifold Data Mining, 2018
- Statistics Canada, Canadian Business Counts, December 2019

For these purposes, the City of Yellowknife, as a census subdivision, is examined, as its geographical catchment area includes Dettah and Ndilo. The City of Yellowknife Census subdivision is presented in comparison to broader geographies, including the Northwest Territories and Canada. The communities of Dettah and Ndilo are presented separately in a later section of the report.

Figure 14 Map of Yellowknife, City, Census subdivision



Source: Statistics Canada, 2020

Demographic portrait

Since 2006, Yellowknife’s population had increased from 18,700 to 20,490 in 2018. This increase represents a growth rate of 6.5%, which is slightly higher than the Northwest Territories, at 5.3%, yet substantially lower than Canada at 11.3%.



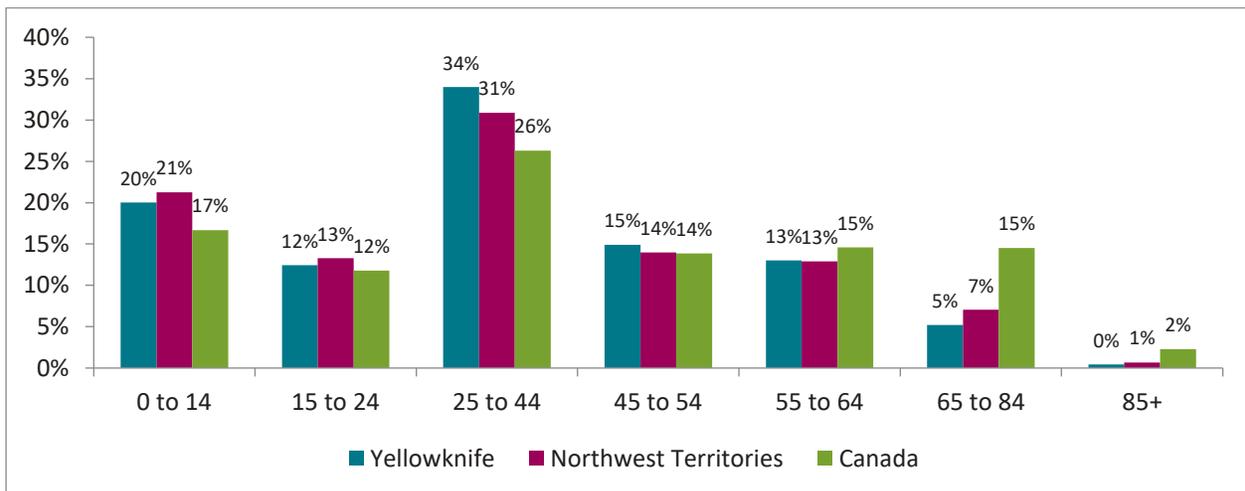
Figure 15: Total population change in Yellowknife, 2006-2018

Year	Yellowknife	Northwest Territories	Canada
2006 Census	18,700	41,464	31,612,897
2011 NHS	19,234	41,462	33,476,688
2016 Census	19,569	41,786	35,151,728
2018 Manifold Estimates	20,490	43,663	37,268,300
Pop. Growth rate 2011-2018	6.5%	5.3%	11.3%

Source: Manifold Data Mining 2018 | Statistics Canada; 2016 Census, | 2011 NHS; 2006 Census |

Figure 16 shows the distribution of Yellowknife’s population by age against the key comparators in 2018. When broken down by age characteristics, the majority (34%) of Yellowknife’s population is aged between 25 and 44 years, representing a strong core working population. Interestingly, this rate is 8% higher than Canada and 3% higher than the Northwest Territories, supporting the assumption of a large core working base. Yellowknife also has substantially fewer retirees (5% of the population) aged 65 or older than the rest of Canada at 17% and the Northwest Territories at 8%.

Figure 16: Age characteristics, percentage of the overall population – detailed categories, 2018



Source: Manifold Data Mining 2018

Meanwhile, Figure 17 shows that Yellowknife’s median age in 2018 of 35.8 years is slightly older than the median age of the Northwest Territories at 34.6 years, yet significantly younger than the rest of Canada at 41.4 years. This data supports the insights gained from Figure 16 that Yellowknife is characterized as having a large, younger working-age population.

Figure 17: Median age of the population, 2011-2018

Year	Yellowknife	Northwest Territories	Canada
Median age population 2011	32.6	32.3	40.6
Median age population 2018	35.8	34.6	41.4

Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS



Yellowknife’s population is predicted to grow by 3% over a ten-year timeline, increasing from 20,490 people in 2018 to 21,038 people by 2028. The growth rate is similar to that of the Northwest Territories at 2%, yet substantially behind Canada’s (11%). Compared to the historical growth rates, as seen in Figure 15, these results indicate that Yellowknife’s population growth is slowing. Overall, Yellowknife must continue to monitor forecasted population growth to ensure the planning of essential municipal services and workforce development strategies can be conducted effectively.

Figure 18: Projected population growth 2018-2028

Characteristics	Yellowknife	Northwest Territories	Canada
2018	20,490	43,663	37,268,300
2023	20,795	44,168	39,220,500
2028	21,038	44,678	41,301,500
10-year Pop. Change	548	1,015	4,033,200
10-year Pop. Change %	3%	2%	11%

Source: Manifold Data Mining 2018

Dwelling Characteristics

Most of the housing in the Yellowknife are single detached (45%), followed by apartment buildings that have fewer than five storeys (24%) and row housing (12%). The share of people living in single-detached houses is lower in Yellowknife than the Northwest Territories and Canada.

Figure 19: Occupied dwellings by type, percentage of the overall population, 2018

Type of dwellings	Yellowknife	Northwest Territories	Canada
Single-detached house	45%	57%	54%
Apartment, building that has five or more storeys	5%	3%	10%
Semi-detached house	2%	7%	5%
Apartment, detached duplex	4%	2%	6%
Row house	12%	11%	6%
Apartment, building that has fewer than five storeys	24%	16%	18%
Other single-attached house	0%	0%	0%

Source: Manifold Data Mining 2018

In Yellowknife, most dwellings are occupied by owners at 57.02%, whereas the share of people renting dwellings represents 42.98% of the city’s residents. In addition, the share of owners in Yellowknife is marginally higher than the Northwest Territories, yet substantially lower than the rest of Canada.

Figure 20: Occupied dwellings by type, percentage of the overall population, 2018

Homeownership	Yellowknife	Northwest Territories	Canada
Owned	57.02%	54.09%	67.86%
Rented	42.98%	45.85%	31.73%

Source: Manifold Data Mining 2018



When analyzing the value of housing, it is noted that Yellowknife has a low housing stock, which has significantly driven the median price of houses up. For example, the median value of dwellings in Yellowknife has risen by 45% over 7 years, from \$359,696 in 2011 to \$520,421 in 2018. This figure is substantially higher than the Northwest Territories, which only saw an increase of 29% over the same period. The median cost for renting in Yellowknife also saw a rise of 14% across the 2011 to 2016 period, up from \$1,473 to \$1,683. The Northwest Territories saw an increase of only 8% over the same period. Overall, Yellowknife must continue to monitor its low housing stock²⁹ and the relationship with house prices moving forward.

Figure 21: Median dwelling and shelter costs of dwellings

Characteristics	Yellowknife	Northwest Territories	Canada
Median value of dwellings (\$) - 2011	\$359,696	\$280,566	\$280,552
Median value of dwellings (\$) - 2018	\$520,421	\$362,674	\$393,476
Median monthly shelter costs for rented dwellings (\$) -2011	\$1,473	\$1,202	\$784
Median monthly shelter costs for rented dwellings (\$) -2016	\$1,683	\$1,298	\$910

Source: Manifold Data Mining 2018 | Statistics Canada; 2016 Census, 2011 NHS

Income

Individual Income

Figure 22 shows the changes in median total individual income over the 2010 to 2018 time period. Compared to the key comparators, Yellowknife has a significantly higher median total income of \$72,464 in 2018. This figure is nearly double that of the rest of Canada at \$37,148 and is 25% higher than the Northwest Territories at \$57,815. Income growth has largely been consistent with the key comparators, growing at a rate of 23% over 8 years 2010 to 2018.

Figure 22: Median total individual income 2010-2018

Characteristics	Yellowknife	Northwest Territories	Canada
Median total income in 2010 among recipients (\$)	\$58,832	\$44,186	\$29,878
Median total income in 2018 among recipients (\$)	\$72,464	\$57,815	\$37,148
% change	23%	31%	24%

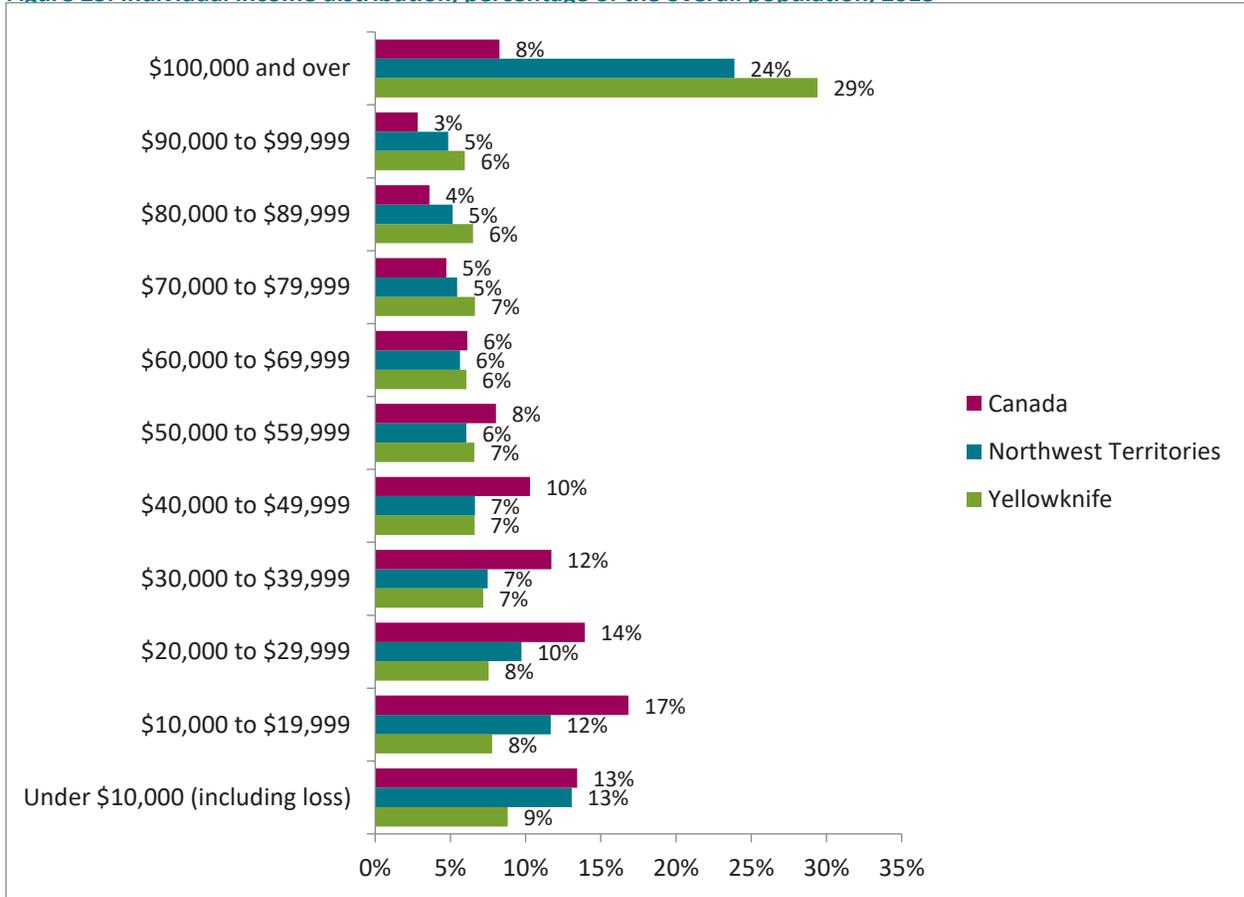
Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS

In terms of the individual income distribution, Figure 23 shows that Yellowknife has a large proportion of high-income earners when compared to the key comparators. For example, 29% of individual incomes in Yellowknife are \$100,000 or higher, compared to 24% in the Northwest Territories and only 8% in the rest of Canada. Conversely, 17% of Yellowknife's population earns under \$29,999 less than the other comparators. These figures suggest significant income disparity within the census subdivision.

²⁹ The vacancy rate for 2018 is 5.2% according to the Canadian Mortgage and Housing Corporation



Figure 23: Individual income distribution, percentage of the overall population, 2018



Source: Manifold Data Mining 2018

Household Income

In 2018 Yellowknife recorded a high median household income of approximately \$178,182. This figure was 38% higher (\$48,600) than the Northwest Territories median and 139% higher (\$103,538) than the Canadian household median. Yellowknife has also experienced the largest percentage growth out of the key comparators, growing by 44% across 8 years 2010 to 2018 or double the Canadian rate.

Figure 24: Median total household income 2010-2018

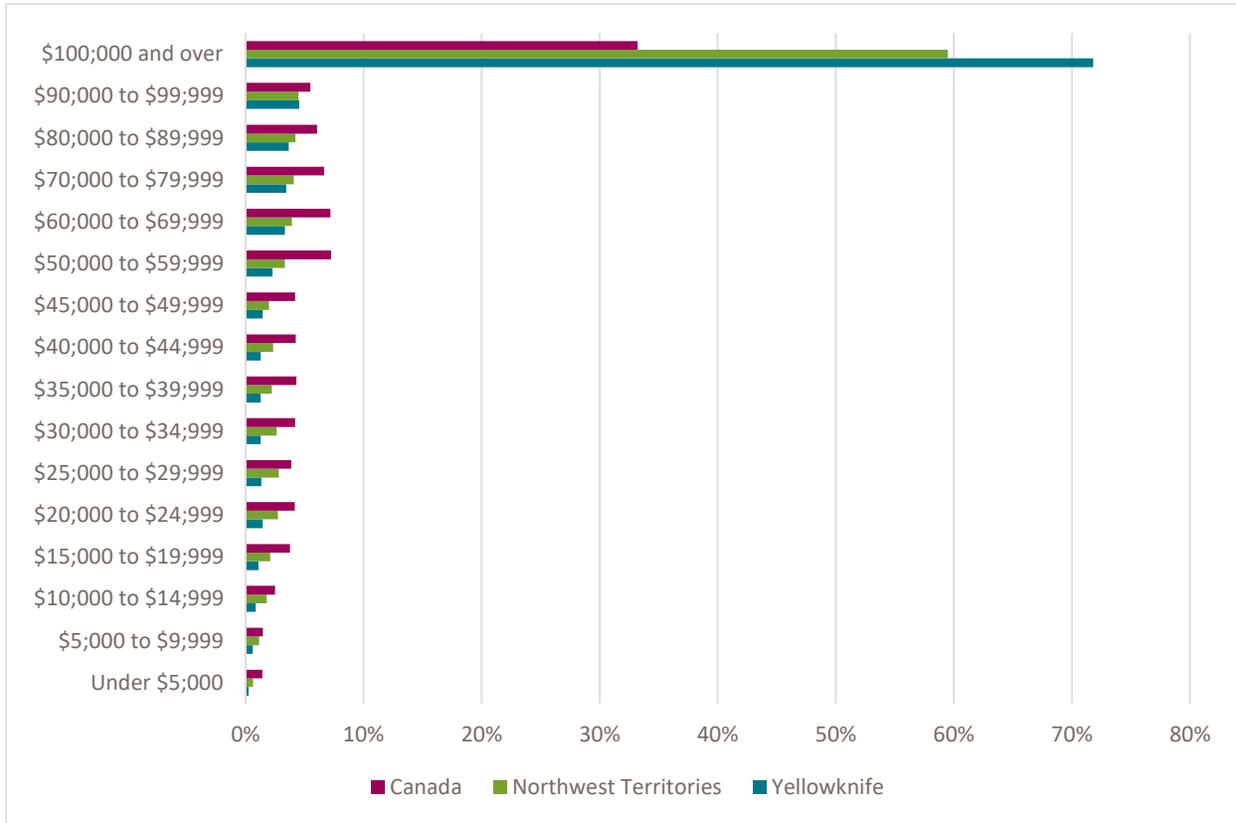
Characteristics	Yellowknife	Northwest Territories	Canada
Median total income of households in 2010 (\$)	\$123,464	\$99,127	\$61,072
Median total income of households in 2018 (\$)	\$178,182	\$129,558	\$74,644
% change	44%	31%	22%

Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS

In terms of the household income distribution, the figure below shows that Yellowknife has a substantially larger share of households with income over \$100,000 compared to the other areas. The city also has a smaller proportion of people with income under \$40,000.



Figure 25: Household income distribution, percentage of the overall population, 2018



Source: Manifold Data Mining 2018

Education

Education attainment can be looked at as an important descriptor of labour force capacity. The figure below summarizes skilled labour proportions for comparator areas, which is composed of those people that have completed an apprenticeship, trade certificate, or college or university degree, diploma, or certificate.

As can be seen in Figure 26, Yellowknife has a higher proportion of its population with a post-secondary degree or apprenticeship education at 69% in 2018 than both the Northwest Territories (60%) and Canada (65%). This rate could indicate a concentration of higher-paying jobs within the region, which attracts a high skilled workforce.

Figure 26: Proportion of population (ages 25 to 64) with post-secondary degree or apprenticeship education (skilled labour), 2011 and 2018

Year	Yellowknife	Northwest Territories	Canada
Skilled Labour 2011 ³⁰	68%	59%	64%
Skilled Labour 2018	69%	60%	65%

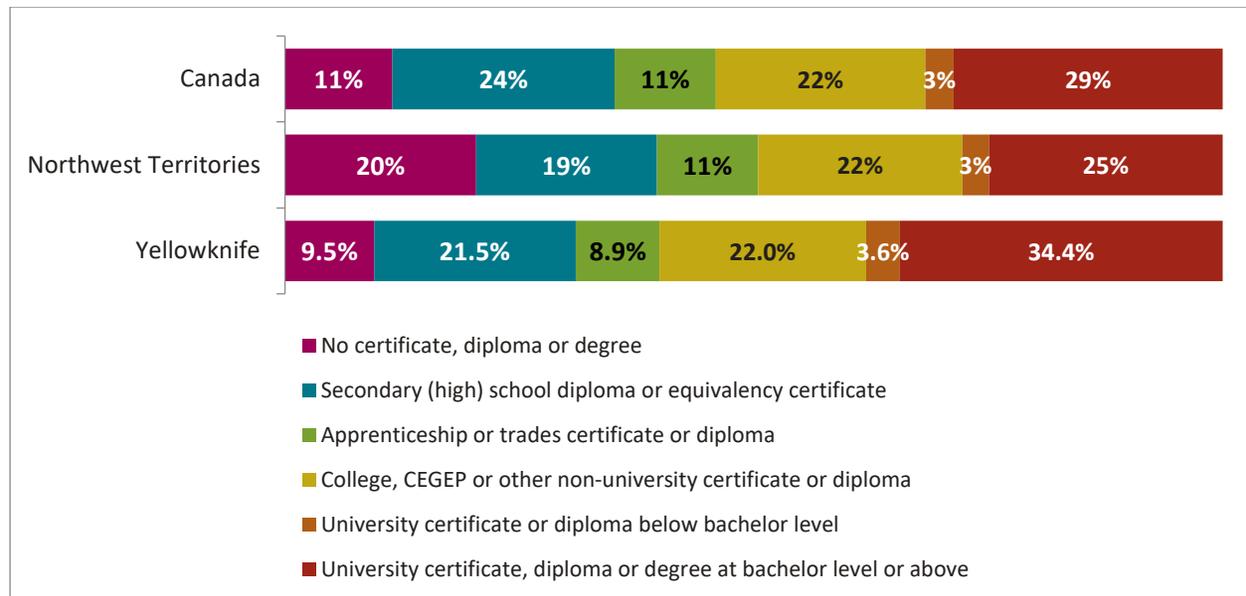
Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS

³⁰ Skilled Labour refers to individuals with a post-secondary degree or apprenticeship



Figure 27 shows that Yellowknife has a larger share of people with a university certificate, diploma, or degree at a bachelor level or above at 34.4% than both key comparators. Yellowknife also has a smaller proportion of people with no certificate, diploma, or degree at 9.5% than the Northwest Territories (20%) and Canada (11%). On all other factors, Yellowknife recorded numbers consistent with the key comparators.

Figure 27: Highest level of education attainment (ages 25 to 64), % of the population, 2018



Source: Manifold Data Mining 2018

People’s major fields of study in Yellowknife are business, management and public administration (12%); followed by architecture, engineering and related technologies (12%); and health and related fields (8%). These are also the main three fields of study in the Northwest Territories and Canada. Furthermore, 38% of those aged 15 years and over did not possess a postsecondary certificate, diploma, or degree; below both key comparators.

Figure 28: Major field of study (ages 15 and over), percentage of the population, 2018

Major field of study	Yellowknife	Northwest Territories	Canada
No postsecondary certificate, diploma or degree	38%	48%	44%
Education	5%	5%	4%
Visual and performing arts and communications technologies	2%	1%	2%
Humanities	3%	2%	3%
Social and behavioural sciences and law	7%	5%	6%
Business, management and public administration	12%	11%	12%
Physical and life sciences and technologies	3%	2%	2%
Mathematics, computer and information sciences	2%	2%	2%
Architecture, engineering and related technologies	12%	11%	12%
Agriculture, natural resources and conservation	2%	2%	1%
Health and related fields	8%	7%	8%
Personal, protective and transportation services	5%	5%	4%
Other fields of study	0%	0%	0%

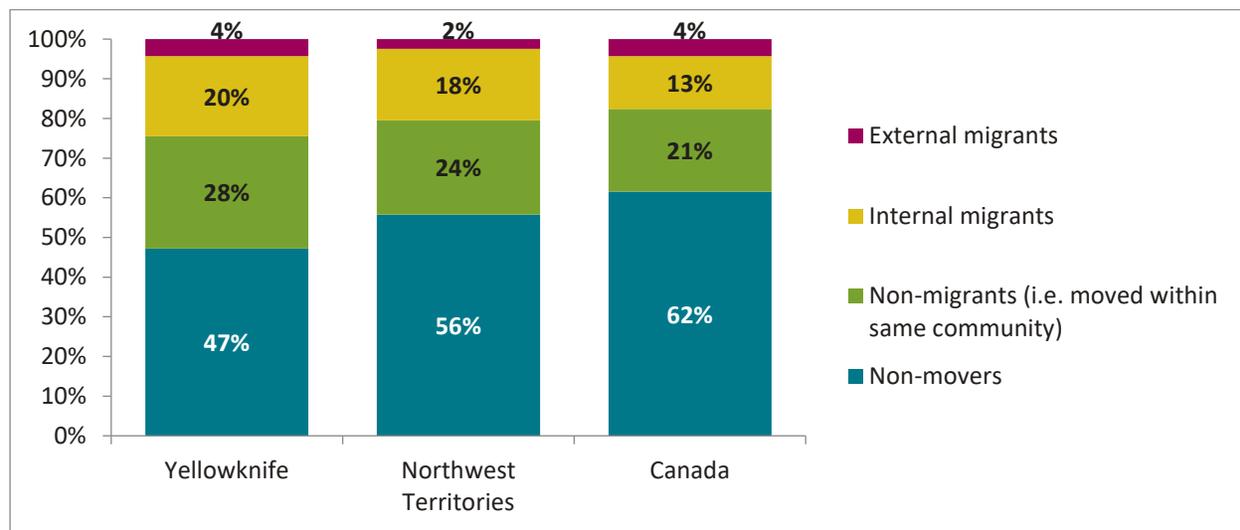
Source: Manifold Data Mining 2018



Mobility

The movement of people within a community or to the community from somewhere else constitutes mobility. Statistics Canada tracks this by asking if a household has moved within the past year and asking if a household has moved within the past five years. As of 2018, most people in Yellowknife, the Northwest Territories and Canada stayed where they were five years earlier or moved somewhere in the same geography. By 2018, Yellowknife had the largest share of migrants (internal and external) with 24%. The relatively large share of internal migrants may suggest a relatively transient community.

Figure 29: Mobility characteristics 5 years ago, 2018



Source: Manifold Data Mining 2018

Labour Force

According to the standard definition employed by Statistics Canada, the employed are persons having a job or business, whereas the unemployed are without work, are available for work, and are actively seeking work. Together the unemployed and the employed constitute the labour force³¹.

Between 2011 and 2018, Yellowknife's labour force grew by 5%, from 12,760 to 13,377. This rate is equal to the growth experienced by the Northwest Territories yet is significantly below that of Canada at 13%.

Figure 30: Labour force size, 2011-2018

Labour Force Size	Yellowknife	Northwest Territories	Canada
In the labour force 2011	12,760	23,930	17,990,080
In the labour force 2018	13,377	25,103	20,347,800
Net (+/-)	617	1,173	2,357,720
% growth	5%	5%	13%
Labour force participation rate 2018	82%	73%	66%

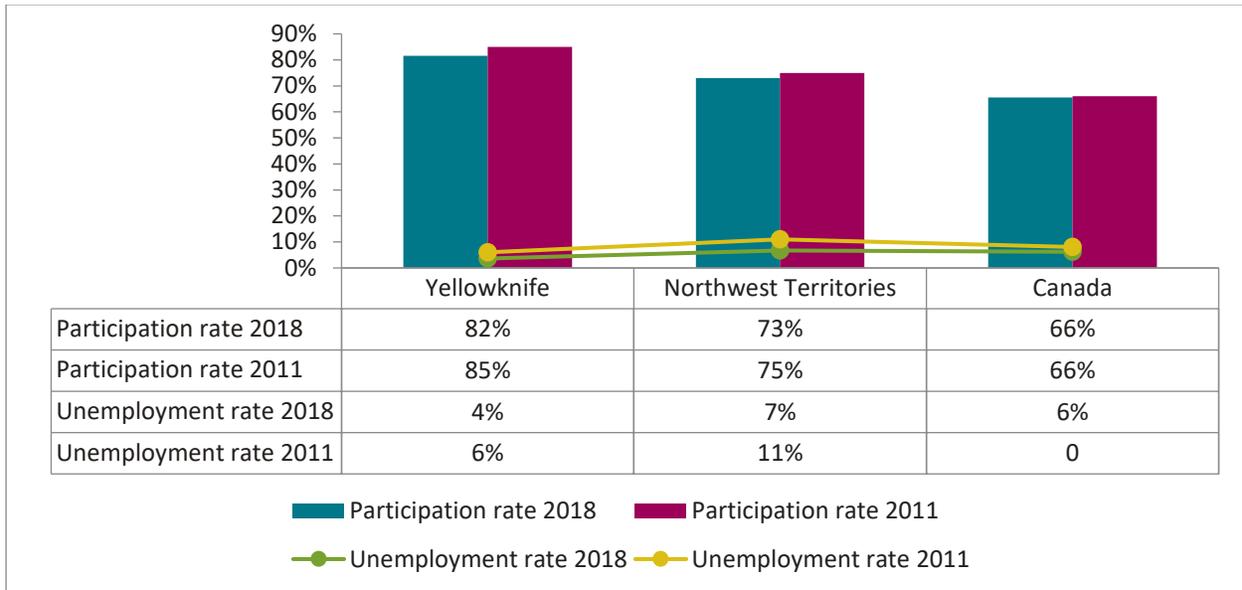
Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS

³¹ Statistics Canada. Retrieved on January 7, 2019 from < <https://www150.statcan.gc.ca/n1/pub/81-004-x/def/4153361-eng.htm> >



Unemployment rates have decreased in all areas between 2011 and 2018. Notably, Yellowknife saw an unemployment decline of 2%. The participation rate is pivotal because out of the total people qualified to enter the labour market (aged 15 and over), it says what proportion is either employed or actively looking for employment. Participation rates have decreased in all the areas analyzed. However, Yellowknife had the highest participation rate fall among these geographies (2%). Note that people looking for work can also include those receiving employment insurance.

Figure 31: Labour force status, percentage of the population, 2011-2018



Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS

Looking at the class of worker, over 92% of the labour force in Yellowknife work as employees in light with the other comparators. Yellowknife also registered the second-highest share of self-employed people with 7% behind Canada at 12%. Yellowknife and the Northwest Territories' low percentage of self-employed persons versus the national percentage suggests a limited entrepreneurship culture in Yellowknife.

Figure 32: Class of worker ratio, 2018

Class of worker	Yellowknife	Northwest Territories	Canada
Employees	92%	91%	86%
Self-employed	7%	6%	12%

Source: Manifold Data Mining 2018



Labour Force by Industry

Of the figure below, Yellowknife has large proportions of its labour force concentrated in public administration (25%), health care and social assistance (9%) and mining, quarrying, and oil and gas extraction (6%). Yellowknife also has an important percentage of its labour force working in retail trade (9%).

Utilities, manufacturing, and management of companies and enterprises were the sectors that employed fewer people in Yellowknife and the Northwest Territories, with shares below the one percentage point in these geographies.

Figure 33: Employed labour force by industry, percentage of labour force, 2018

NAICS	Yellowknife	Northwest Territories	Canada
Industry - not applicable	1%	3%	2%
11 Agriculture, forestry, fishing and hunting	0%	1%	2%
21 Mining, quarrying, and oil and gas extraction	6%	6%	2%
22 Utilities	1%	2%	1%
23 Construction	5%	7%	7%
31-33 Manufacturing	1%	1%	8%
41 Wholesale trade	2%	1%	4%
44-45 Retail trade	9%	9%	11%
48-49 Transportation and warehousing	7%	6%	5%
51 Information and cultural industries	3%	2%	2%
52 Finance and insurance	2%	2%	4%
53 Real estate and rental and leasing	2%	2%	2%
54 Professional, scientific and technical services	5%	4%	7%
55 Management of companies and enterprises	0%	0%	0%
56 Administrative and support, waste management and remediation services	4%	3%	4%
61 Educational services	6%	7%	7%
62 Health care and social assistance	9%	9%	11%
71 Arts, entertainment and recreation	2%	2%	2%
72 Accommodation and food services	6%	5%	7%
81 Other services (except public administration)	4%	4%	4%
91 Public administration	25%	24%	6%

Source: Manifold Data Mining 2018

Yellowknife saw a net increase of 617 people in the labour force over the 2011 to 2018 period. Sectors that experienced the largest net increases include:

- Public administration – net increase of 282 people (8% change)
- Health care and social assistance – net increase of 126 people (11% change)
- Administrative and support, waste management and remediation services – net increase of 150 people (30% change)



- Retail trade – net increase of 113 people (9% change)

Conversely, sectors that saw the largest net decrease in the labour force include:

- Transportation and warehousing – net decrease of 196 people (20% change)
- Mining, quarrying, and oil and gas extraction – net decrease of 134 people (16% change)
- Construction – net decrease of 118 people (17% change)

Figure 34: Changes in the employed labour force by Industry, 2011-2018

Industry (NAICS)	2011	2018	Net (+/-)
Total	12760	13377	617
Industry - NAICS2012 - not applicable	225	160	-65
11 Agriculture, forestry, fishing and hunting	10	50	40
21 Mining, quarrying, and oil and gas extraction	965	831	-134
22 Utilities	65	100	35
23 Construction	795	677	-118
31-33 Manufacturing	115	163	48
41 Wholesale trade	225	210	-15
44-45 Retail trade	1080	1,193	113
48-49 Transportation and warehousing	1155	959	-196
51 Information and cultural industries	415	430	15
52 Finance and insurance	270	306	36
53 Real estate and rental and leasing	180	244	64
54 Professional, scientific and technical services	670	713	43
55 Management of companies and enterprises	30	11	-19
56 Administrative and support, waste management and remediation services	355	505	150
61 Educational services	785	779	-6
62 Health care and social assistance	1035	1,161	126
71 Arts, entertainment and recreation	135	212	77
72 Accommodation and food services	730	780	50
81 Other services (except public administration)	425	522	97
91 Public administration	3090	3,372	282

Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS

Despite the insight gleaned from the above, further analytical tools allow for assessing industry competitiveness relative to the overall territory. These can prove insightful for understanding what industries make sense to promote further growth or monitoring for potential declines.

A location quotient analysis explains which industries employ a competitively higher proportion of people than the Territory. A score of 1.25 or greater represents a relative strength; a score between 0.75 and 1.25 represents a sector that is on par with the territory (1.0 represents perfect parity). A score below 0.75 represents a sector of comparative weakness. Also pertinent are the trends over time and their direction, which indicates that potential opportunities or threats need to be addressed. Based on the above considerations, the following observations emerge from the data in the figure below:

- Competitive sectors include finance and insurance; professional, scientific and technical services; real estate and rental and leasing information; and cultural industries.
- Moderate or high competing sectors include mining, quarrying, and oil and gas extraction; public administration, transportation and warehousing; educational services and wholesale trade.

Comparatively weak sectors include construction; utilities; and agriculture, forestry, fishing and hunting.



- Over the 2011 to 2018 period, notable sectors that experienced growth in concentration include: administrative and support, waste management and remediation services; utilities; retail trade; finance and insurance; and health care and social assistance.

Figure 35: Employment location quotient (LQ) analysis – concentration of employed labour force by industry 2011 to 2018

Industry (NAICS)	LQ 2011	Strength	LQ 2018	Strength	Change	Trend
11 Agriculture, forestry, fishing and hunting	0.13	Low	0.37	Low	0.25	Growing
21 Mining, quarrying, and oil and gas extraction	1.25	Moderate	1.09	Moderate	-0.16	Declining
22 Utilities	0.44	Low	0.47	Low	0.03	Growing
23 Construction	0.78	Moderate	0.71	Low	-0.07	Declining
31-33 Manufacturing	1.17	Moderate	1.07	Moderate	-0.09	Declining
41 Wholesale trade	1.17	Moderate	1.09	Moderate	-0.09	Declining
44-45 Retail trade	0.95	Moderate	0.99	Moderate	0.04	Growing
48-49 Transportation and warehousing	1.22	Moderate	1.20	Moderate	-0.01	Declining
51 Information and cultural industries	1.54	High	1.44	High	-0.10	Declining
52 Finance and insurance	1.45	High	1.46	High	0.01	Growing
53 Real estate and rental and leasing	0.79	Moderate	1.03	Moderate	0.24	Growing
54 Professional, scientific and technical services	1.39	High	1.30	High	-0.08	Declining
55 Management of companies and enterprises	0.87	Moderate	1.88	High	1.01	Growing
56 Administrative and support, waste management and remediation services	1.05	Moderate	1.13	Moderate	0.09	Growing
61 Educational services	0.84	Moderate	0.81	Moderate	-0.04	Declining
62 Health care and social assistance	0.94	Moderate	0.99	Moderate	0.05	Growing
71 Arts, entertainment and recreation	0.72	Low	0.83	Moderate	0.10	Growing
72 Accommodation and food services	1.19	Moderate	1.08	Moderate	-0.11	Declining
81 Other services (except public administration)	0.94	Moderate	1.03	Moderate	0.09	Growing
91 Public administration	0.99	Moderate	1.06	Moderate	0.07	Growing

Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS. Adapted by MDB Insight

Figure 36 presents the results of another analytical tool called a **shift-share analysis**. The shift-share articulates the factors which drive changes in employment through three primary considerations:

- Reference Area Growth Effect: The impact that changes in the overall broader economy at the territorial level have had on local employment in each sector, leading to an increase or decrease in local employment.
- Industrial Mix Effect: The impact that changes among different industries of the economy have had on local employment in a given sector, leading to an increase or decrease in local employment.
- Differential Shift: The impact that local factors have had on increases or decreases in local employment (i.e., changes that cannot be explained by those in the reference area growth effect or industrial mix effect).

The data below indicates the following:

- Overall, changes in the labour force were driven by growth in the reference area growth effect (631 jobs) (i.e. growth of the Northwest Territory’s economy), and by changes in the local factors under



the differential shift (120 jobs). Small declines were driven mostly by industry changes. In total, the gains and declines resulted in a net gain of 688 new jobs for Yellowknife.

- Increases were most evident in public administration; retail trade; health care and social assistance; administrative and support; and waste management and remediation services.
- Declines are most evident in transportation and warehousing; mining and oil and gas extraction and construction.

Figure 36: Northwest Territories/Yellowknife – Shift Share Analysis

North American Industry Classification System	Area Growth Effect	Industrial Mix Effect	Differential Shift	Total
Agriculture, forestry, fishing and hunting	1	6	33	40
Mining and oil and gas extraction	49	-57	-125	-134
Utilities	3	26	6	35
Construction	40	-87	-71	-118
Manufacturing	6	56	-14	48
Wholesale trade	11	-9	-17	-15
Retail trade	54	8	50	113
Transportation and warehousing	58	-243	-11	-196
Information and cultural industries	21	23	-29	15
Finance and insurance	14	20	2	36
Real estate and rental and leasing	9	-1	56	64
Professional, scientific and technical services	34	56	-47	43
Management of companies and enterprises	2	-26	6	-19
Administrative and support, waste management and remediation services	18	94	38	150
Educational services	40	-9	-37	-6
Health care and social assistance	52	19	55	126
Arts, entertainment and recreation	7	44	26	77
Accommodation and food services	37	92	-79	50
Other services (except public administration)	21	32	44	97
Public administration	156	-107	234	282
Total	631	-64	120	688

Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS. Adapted by MDB Insight

*Calculation does not include “not applicable industries”

A more detailed analysis of the employed labour force shows the industries at the NACIS 4-digit level. In Yellowknife, provincial and territorial public administration is the industry with the largest local labour force employed at 17%. This is followed by elementary and secondary schools (5%), non-metallic mineral mining and quarrying (5%), and full-service restaurants and limited-service eating places (4%).

Figure 37: Top 20 Industries (4 Digit NAICS) by Employed Labour Force, 2018

NAICS (4-Digit)	Yellowknife	Northwest Territories	Canada
9120 Provincial and territorial public administration (9121 to 9129)	17%	14%	2%
6111 Elementary and secondary schools	5%	6%	5%
2123 Non-metallic mineral mining and quarrying	5%	4%	0%
7225 Full-service restaurants and limited-service eating places	4%	3%	6%
9112-9119 Other federal government public administration	4%	3%	2%
4811 Scheduled air transportation	3%	2%	0%
6220 Hospitals(6221 to 6223)	3%	3%	4%



NAICS (4-Digit)	Yellowknife	Northwest Territories	Canada
9111 Defence services	3%	2%	1%
4451 Grocery stores	2%	4%	2%
9130 Local, municipal and regional public administration (9131 to 9139)	2%	3%	2%
2382 Building equipment contractors	1%	2%	2%
5416 Management, scientific and technical consulting services	1%	1%	1%
6244 Child day-care services	1%	1%	1%
5616 Investigation and security services	1%	1%	1%
7211 Traveller accommodation	1%	2%	1%
5413 Architectural, engineering and related services	1%	1%	1%
5617 Services to buildings and dwellings	1%	1%	2%
5171 Wired telecommunications carriers	1%	1%	1%
6241 Individual and family services	1%	1%	1%
4411 Automobile dealers	1%	1%	1%

Source: Manifold Data Mining 2018

Labour Force by Occupation

Figure 38 shows the number of people working in each occupation, as defined by the National Occupational Classification (NOC) for 2018. Occupations in sales and service and business, finance and administration have the highest percentage of the labour force employed in Yellowknife at 18%, followed by occupations in education, law and social, community and government services at 16%.

Figure 38: Employed labour force by occupational category, percentage of labour force, 2018

National Occupational Classification (NOC) (1-Digit)	Yellowknife	Northwest Territories	Canada
Occupation - not applicable	1%	3%	2%
0 Management occupations	13%	12%	11%
1 Business, finance and administration occupations	18%	16%	15%
2 Natural and applied sciences and related occupations	9%	7%	7%
3 Health occupations	6%	5%	7%
4 Occupations in education, law and social, community and government services	16%	17%	11%
5 Occupations in art, culture, recreation and sport	3%	2%	3%
6 Sales and service occupations	18%	18%	23%
7 Trades, transport and equipment operators and related occupations	12%	16%	14%
8 Natural resources, agriculture and related production occupations	3%	3%	2%
9 Occupations in manufacturing and utilities	1%	2%	4%

Source: Manifold Data Mining 2018

Occupations that experienced major growth in Yellowknife include occupations in education, law and social, community and government services (+300 jobs), sales and service occupations (+220 jobs), and health occupations (+111 jobs). However, occupations with the slowest growth include business, finance and administration occupations, and natural and applied sciences and related occupations.



Figure 39: Employed labour force by occupational category (number of people), 2011-2018

Occupations (NOC)	Yellowknife 2011	Yellowknife 2018	Net (+/-)
Total	12,760	13,377	617
Occupation - not applicable	225	160	-65
0 Management occupations	1,745	1,738	-7
1 Business, finance and administration occupations	2,480	2,384	-96
2 Natural and applied sciences and related occupations	1,240	1,167	-73
3 Health occupations	650	761	111
4 Occupations in education, law and social, community and government services	1,855	2,155	300
5 Occupations in art, culture, recreation and sport	350	404	54
6 Sales and service occupations	2,195	2,415	220
7 Trades, transport and equipment operators and related occupations	1,615	1,659	44
8 Natural resources, agriculture and related production occupations	280	346	66
9 Occupations in manufacturing and utilities	125	187	62

Source: Manifold Data Mining 2018 | Statistics Canada; 2011 NHS. Adapted by MDB Insight

Commuting Patterns

The study on commuting patterns measures the import and export characteristics of a region’s workforce. A high percentage of the outside labour force working in the community depicts the attraction of the region for nearby communities. In contrast, if the majority of the workers in the community leave for their work (export of labour force), then it may hint towards a lack of proportional opportunities in the community.

Based on the table below, Yellowknife is a net importer of workers, importing 150 people in 2016, indicating the attraction of the region for employment opportunities. However, due to Yellowknife’s remote geographic location and other factors, most of the working population lives and works in Yellowknife (9,995 workers). The top industries for those living and working in Yellowknife include public administration (3,105 workers), retail trade (1,045 workers) and educational services (620 workers). Of those who do leave, most work in educational services (45 workers), health care and social assistance (30 workers), or public administration (30 workers). Conversely, the top sectors that commute to Yellowknife include mining, quarrying, and oil and gas extraction (155 workers), public administration (130 workers), and construction (40 workers).



Figure 40: Net import/export of workers Yellowknife, NWT 2016

NAICS	Commuting to Yellowknife	Living and working in Yellowknife	Leaving Yellowknife	Net Import/Export
11 Agriculture, forestry, fishing and hunting	0	15	10	-10
21 Mining, quarrying, and oil and gas extraction	155	385	0	155
22 Utilities	0	55	0	0
23 Construction	40	300	10	30
31-33 Manufacturing	0	100	10	-10
41 Wholesale trade	0	135	10	-10
44-45 Retail trade	0	1,045	30	-30
48-49 Transportation and warehousing	20	725	10	10
51 Information and cultural industries	0	315	10	-10
52 Finance and insurance	0	265	0	0
53 Real estate and rental and leasing	0	135	10	-10
54 Professional, scientific and technical services	10	520	10	0
55 Management of companies and enterprises	0	0	0	0
56 Administrative and support, waste management and remediation services	10	285	0	10
61 Educational services	10	620	45	-35
62 Health care and social assistance	15	980	30	-15
71 Arts, entertainment and recreation	0	105	20	-20
72 Accommodation and food services	10	520	0	10
81 Other services (except public administration)	10	385	20	-10
91 Public administration	130	3,105	30	100
Total	410	9,995	255	155

Source: Statistics Canada; 2016 Census

When it comes to the labour force living in Yellowknife, about 255 people leave Yellowknife to work. Most of the people commute to Behchokò, Edmonton or Fort Smith.

Figure 41: Commuting destination of people commuting from Yellowknife, 2016

Commuting Destination	Total
Behchokò	55
Edmonton	20
Fort Smith	20

Source: Statistics Canada; 2016 Census

The analysis from the 2016 Census suggests that about 410 people commute to Yellowknife from other geographies to work, mostly from Hay River or Dettah.

Figure 42: Place of residence of the people commuting to Yellowknife, 2016

Commuting Origin	Total
Region 6, Unorganized ³²	100
Hay River	40
Dettah	30

Source: Statistics Canada; 2016 Census

³² See [Statistics Canada](http://www150.statcan.gc.ca/n1/pub/92-627-x/2016001/article/14861-eng.htm) website for further information:



Business Counts

Statistics Canada's Canadian Business Counts provides a record of business establishments by industry sector and size. This data is collected from the Canadian Revenue Agency (CRA). The Canadian Business Counts data records business counts as either "Without Employees" or "With Employees." The establishments in the "Without Employees" category include the self-employed (i.e., those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Counts data use the Canada Revenue Agency as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than \$30,000 are not included.

Focusing primarily at the "Sub-Total, classified" numbers and industry breakdowns, the analysis found that:

- As of December 2019, approximately 2,069 businesses were registered in Yellowknife. These include businesses classified by industry (1,934 businesses) and those unclassified (135 businesses).
- Of the 1,934 businesses classified by industry, the greatest number of businesses are found in real estate and rental and leasing (313 businesses), professional, scientific and technical services (231 businesses) and construction (180 businesses).
- 57% (1,103 businesses) of those classified by industry have no employees.
- Of the 831 businesses with employees, 59% employ between 1 to 9 people and only 3.5% employ more than 100.³³

³³ Note: This section includes all registered companies with a Goods and Services Tax number, as registered through the Canada Revenue Agency. Results should not be compared directly to existing business directories as the criteria for registering are different for both. The Canadian Business Counts data are used primarily so that comparisons can be made to the Territorial Distribution of businesses across the same categories.



Figure 43: Business counts Yellowknife by industry and business size (number of employees)

Industry (NAICS)	Total	Ind.	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	2,069	1,198	871	341	189	151	118	43	19	8	2
Unclassified	135	95	40	37	1	2	0	0	0	0	0
Sub-total, classified	1,934	1,103	831	304	188	149	118	43	19	8	2
11 - Agriculture, forestry, fishing and hunting	5	3	2	1	0	0	1	0	0	0	0
21 - Mining and oil and gas extraction	20	8	12	1	2	0	4	1	0	2	2
22 - Utilities	2	1	1	0	0	0	0	1	0	0	0
23 - Construction	180	90	90	36	22	8	17	4	3	0	0
31-33 - Manufacturing	19	8	11	2	6	2	1	0	0	0	0
41 - Wholesale trade	40	9	31	10	6	9	4	2	0	0	0
44-45 - Retail trade	133	44	89	30	25	18	9	5	1	1	0
48-49 - Transportation and warehousing	112	67	45	12	10	7	9	3	4	0	0
51 - Information and cultural industries	32	15	17	4	5	3	4	1	0	0	0
52 - Finance and insurance	82	63	19	7	4	5	2	1	0	0	0
53 - Real estate and rental and leasing	313	283	30	14	10	4	1	1	0	0	0
54 - Professional, scientific and technical services	231	138	93	52	17	17	4	3	0	0	0
55 - Management of companies and enterprises	38	30	8	3	1	0	2	1	1	0	0
56 - Administrative and support, waste management and remediation services	99	47	52	20	15	12	3	1	1	0	0
61 - Educational services	36	16	20	8	4	3	2	1	0	2	0
62 - Health care and social assistance	159	112	47	15	5	15	10	1	1	0	0
71 - Arts, entertainment and recreation	46	29	17	6	4	4	2	1	0	0	0
72 - Accommodation and food services	107	32	75	18	22	12	15	5	3	0	0
81 - Other services (except public administration)	173	97	76	31	21	19	3	1	1	0	0
91 - Public administration	107	11	96	34	9	11	25	10	4	3	0

Source: Statistics Canada, Canadian Business Counts, December 2019



The table below presents the distribution of businesses with employees in Yellowknife. The four largest sectors with employees include public administration (96 businesses or 11% of total); professional, scientific and technical services (93 businesses or 11% of total); construction (90 businesses or 10% of total); and retail trade (89 businesses or 10% of total).

Figure 44: Businesses by industry in Yellowknife, percentage of total businesses with employees, 2019

Industry (NAICS)	Number of business with employees	% of total business with employees
91 - Public administration	96	12%
54 - Professional, scientific and technical services	93	11%
23 - Construction	90	11%
44-45 - Retail trade	89	11%
81 - Other services (except public administration)	76	9%
72 - Accommodation and food services	75	9%
56 - Administrative and support, waste management and remediation services	52	6%
62 - Health care and social assistance	47	6%
48-49 - Transportation and warehousing	45	5%
41 - Wholesale trade	31	4%
53 - Real estate and rental and leasing	30	4%
61 - Educational services	20	2%
52 - Finance and insurance	19	2%
51 - Information and cultural industries	17	2%
71 - Arts, entertainment and recreation	17	2%
21 - Mining and oil and gas extraction	12	1%
31-33 - Manufacturing	11	1%
55 - Management of companies and enterprises	8	1%
11 - Agriculture, forestry, fishing and hunting	2	0.2%
22 - Utilities	1	0.1%

Source: Statistics Canada, Canadian Business Counts, December 2019

Again, using the location quotient analysis, where 1.25 or greater represents strength, 0.75 to 1.25 represents proximity to the Territory distribution, and below 0.75 represents low competitiveness, the sectors with the higher concentration of businesses than the Territory include wholesale trade and information and cultural industries.



Figure 45: Business count location quotients (LQ) businesses with employees by industry, 2018

Industry (NAICS)	LQ 2019	Strength
11 - Agriculture, forestry, fishing and hunting	0.31	Low
21 - Mining and oil and gas extraction	0.98	Moderate
22 - Utilities	0.31	Low
23 - Construction	0.88	Moderate
31-33 - Manufacturing	1.15	Moderate
41 - Wholesale trade	1.53	High
44-45 - Retail trade	0.88	Moderate
48-49 - Transportation and warehousing	0.86	Moderate
51 - Information and cultural industries	1.28	High
52 - Finance and insurance	0.89	Moderate
53 - Real estate and rental and leasing	0.73	Low
54 - Professional, scientific and technical services	1.22	Moderate
55 - Management of companies and enterprises	0.83	Moderate
56 - Administrative and support, waste management and remediation services	1.15	Moderate
61 - Educational services	0.87	Moderate
62 - Health care and social assistance	0.82	Moderate
71 - Arts, entertainment and recreation	1.14	Moderate
72 - Accommodation and food services	1.14	Moderate
81 - Other services (except public administration)	1.03	Moderate
91 - Public administration	1.05	Moderate

Source: Statistics Canada, Canadian Business Counts, December 2019



Economic Baseline Analysis – Yellowknives Dene First Nation

The purpose of this section of the report is to provide an economic and demographic breakdown of the Yellowknives Dene First Nation. All data was sourced from the Northwest Territories Bureau of Statistics.

Notes on Data

The data available for Ndilo and Dettah is collected through the territory government and is, therefore, a separate census system than Statistics Canada’s census of population. Typically, Statistics Canada suppresses data for geographies with population sizes under a threshold of 100 people, and detailed breakdowns are often suppressed for populations in the 100s. Thus, it is pertinent to examine the most localized data available for this Joint Economic Development Strategy, despite some limitations.

Demographics

Figure 46 shows a breakdown of the demographics for Dettah and Ndilo. Age distributions show that Dettah and Ndilo have slightly similar age distributions to Akaitcho, with variances between 1% to 3%. The highest proportion (21%) of Dettah and Ndilo’s population is aged between 30 to 49 years old. Furthermore, 8.2% of the population is aged 65 years or older.

Figure 46: Demographics

	Total (Dettah & Ndilo)		Akaitcho	
	(#)	(%)	(#)	(%)
Total Population	553	100.0	357	100.0
0 - 4	38	6.9	18	5.1
5 - 9	44	8.0	30	8.3
10 - 14	50	9.0	42	11.8
15 - 19	50	9.1	33	9.1
20 - 24	48	8.6	31	8.7
25 - 29	40	7.2	27	7.7
30 - 49	116	21.0	67	18.6
50 - 59	84	15.2	51	14.2
60 - 64	38	6.9	27	7.5
65+	45	8.2	32	8.9
Male	294	53.2	196	54.9
Female	259	46.8	161	45.1

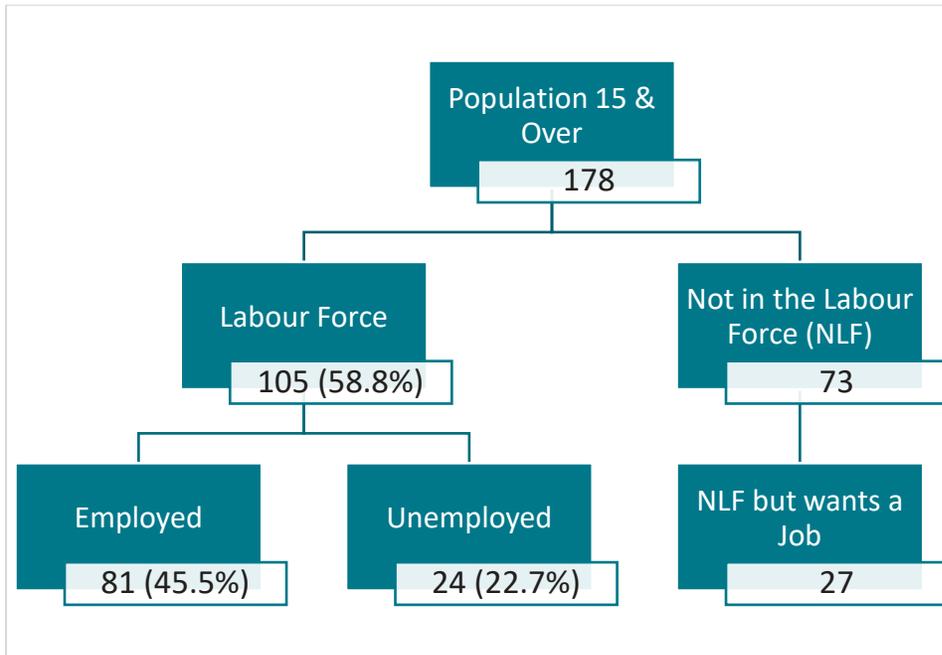
Source: NWT Bureau of Statistics - May 8, 2020



Dettah Labour Force Information

Located 27 km up the Ingraham Trail from Yellowknife, Dettah has a population of 178 people aged 15 years and older. Of those, 105 people are in the labour force, with 81 people (45.5%) employed and 24 (22.7%) unemployed. Out of the remaining 73 people not in the labour force, 27 indicated that they want employment.³⁴

Figure 47: Dettah labour force information



Source: NWT Bureau of Statistics - May 8, 2020

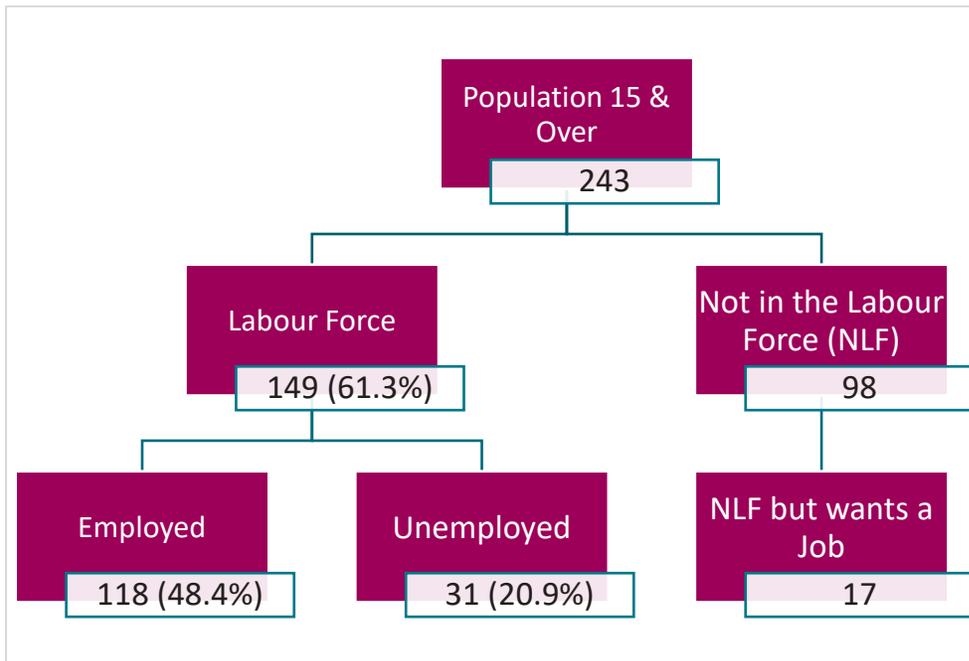
³⁴ The NWT Bureau of Statistics defines Not in the Labour Force as: Persons who were neither employed, nor unemployed during the reference period. This includes persons who, during the reference period, were either unable to work or unavailable for work. It also includes person who were without work and who had neither looked for work in the past four weeks, nor had a job to start within four weeks of the reference period.



Ndilo Labour Force Information

The Dene village of Ndilo located on the tip of Latham Island (the southern point of Yellowknife's Old Town), has a population of 243 people. Currently, 149 people or 61% of the population is defined as being in the labour force. Of those, nearly half (48.4% or 118 people) are employed and 31 (20.9%) unemployed. Those not in the labour force represents 98 people with 17, indicating they are seeking employment opportunities.

Figure 48: Ndilo labour force information



Source: NWT Bureau of Statistics - May 8, 2020



Appendix E: Background Document Review

Background Document Review

A detailed review of all relevant municipal reports and policy documents relating to economic development has been conducted. The table below provides a list of all of the relevant documents for each organization.

Yellowknives Dene First Nation	City of Yellowknife
<ul style="list-style-type: none"> ▪ Community Readiness Initiative 2015 ▪ Economic Development Strategy ▪ Economic Readiness Strategy 2016 ▪ Labour Force Development Strategy 2016 ▪ Strategic Plan 2014-2019 ▪ Tourism Strategy 2017-2020 	<ul style="list-style-type: none"> ▪ Citizen Survey 2017 ▪ Community Plan and Community Plan Background Report ▪ Council Strategic Plan 2019-2022 ▪ Council’s Approved Vision for the Downtown ▪ Creating Vibrancy in Downtown Yellowknife: 50/50 Site and Beyond ▪ Downtown Retail Revitalization Strategy 2019 ▪ Economic Development Strategy 2014-2019 ▪ Economic Development Strategy 2020-2024 ▪ Energy Action Plan 2015-2025 ▪ Strategic Waste Management Plan 2018 ▪ 10 Year Plan to End Homelessness 2017 ▪ Tourism Strategy 2015-2019 ▪ GROW: Yellowknife Food and Agriculture Strategy ▪ Visitor Services Strategy 2018 ▪ Yellowknife Airport Five-Year Business Plan 2018-2019 to 2022-2023 ▪ Yellowknife Business Incentive Strategy and Business Incubation Strategy Framework
Joint City-First Nation Initiatives	
<ul style="list-style-type: none"> ▪ Strategic Planning Workshop Outcomes and Objectives 2019 	



Yellowknives Dene First Nation Document Review

Community Readiness Initiative 2015

Purpose: The purpose of the Community Readiness Initiative was to develop, in consultation with the Yellowknives Dene First Nation communities, a Community Readiness Plan to address the socio-economic impact of current and proposed major resource development projects in the region primarily related to diamond mining and the reclamation of Giant Mine. The initiative consists of eight strategic goals:

- 1) Improve education and skills development;
- 2) Strengthen self-governance and administration;
- 3) Facilitate economic development;
- 4) Improve health and wellness;
- 5) Foster environmental integrity;
- 6) Improve community infrastructure;
- 7) Strengthen traditional culture; and
- 8) Increase public safety.

Key Takeaways and Economic Considerations:

- The Labour force size in Ndilo and Dettah in 2009 was 444 persons.
- Attainment of post-secondary education and specialized skills amongst Yellowknives Dene First Nation members is low. This is a barrier to accessing higher-wage employment in resource-related industries.
- A land claim settlement would provide more certainty for Yellowknives Dene First Nation and allow them to have better financial partnerships with mining companies, particularly those located on claimed land.
- Seven implementation activities were identified under Goal #3 (Facilitate economic development):
 - 1) Recruit a community economic and land development specialist;
 - 2) Develop a Yellowknives Dene First Nation Economic Development Strategy;
 - 3) Develop a strategic entrepreneurship development plan for the Yellowknives Dene First Nation communities to build business capacity;
 - 4) Determine a strategy on how Det'on Cho Management LP can improve return on investment on existing and future business ventures;
 - 5) Improve engagement with Denendeh Development Corporation and the 7 corporations held within the Denendeh Investments Limited Partnership to foster synergies;
 - 6) Facilitate improvements to employee attraction and retention strategies to increase Yellowknives Dene First Nation labour force participation; and
 - 7) Reach agreement amongst Yellowknives Dene First Nation's elected and administrative leaders on what socio-economic indicators are important to benchmark and track and then integrate these into Impact Benefit Agreements (IBAs) and community planning.



Economic Readiness Strategy 2016

Purpose: The Economic Readiness Strategy is an economic strategy that sets economic goals for two different timeframes: (1) Pre-Land Title Settlement (2016-2020) and (2) Post-Land Title Settlement (Est. 2020 and beyond).

The goals for Pre-Land Title Settlement are:

- 1) Clarify, differentiate and strengthen economic and business development roles and responsibilities;
- 2) Improve business development and management capacity amongst Development Corporation (DCC) Board and Yellowknives Dene First Nation members;
- 3) Improve economic and revenue policy development, capacity, collaboration and cooperation;
- 4) Improve infrastructure to support business development and community growth;
- 5) Expand and diversify Yellowknives Dene First Nation and DCC income streams; and
- 6) Establish a Yellowknives Dene First Nation Land and Community Legacy Trust.

The goals for Post-Land Title Settlement are:

- 1) Clarify economic development jurisdiction and strategic partnerships;
- 2) Increase economic development through land and resource development opportunities;
- 3) Improve Yellowknives Dene First Nation's community business development; and
- 4) Expand and diversify Yellowknives Dene First Nation's income streams.

Key Takeaways and Economic Considerations:

- The strategy identifies businesses offering authentic tourism experiences as an economic opportunity.
- Small business development could be an opportunity with businesses based in Ndilo and Dettah, taking advantage of their proximity to the City of Yellowknife.
- There may be administrative employment opportunities after land claim is settled due to expanded administrative roles concerning self-government. This could include employment-related to economic development, infrastructure in Ndilo and Dettah, land use planning regulation, health and wellness, policy development, communications/IT support and education.
- The majority of current revenue comes from transfers from the federal and territorial governments. Some revenue is received from Impact Benefit Agreements and Yellowknives Dene First Nation's rental properties.
- Once self-government is in place, new revenue could be generated from taxation, user fees and leasing rates. Other revenue may be generated through mining projects in royalties, sales taxes, income taxes, land leases/rents and user fees.
- Increasing the Det'on Cho Management LP profits is also a priority.



Labour Force Development Strategy 2016

Purpose: The purpose of this strategy is to identify unique and creative initiatives and actions to address current and future labour force challenges.

Key Takeaways and Economic Considerations:

- The strategy identifies the following strengths:
 - Population dynamics including a relatively young population and rising education levels;
 - Access to employment opportunities;
 - Employment agreements and policies that include preferential hiring practices; and
 - Access to education programs and financing.
- The strategy identifies the following challenges and threats:
 - Education and training levels that are below the Territorial average;
 - Social challenges and workplace issues;
 - Long-term employment prospects;
 - Retention and advancement concerns; and
 - Lack of employment program coordination and labour market information.
- There are six goals in the strategy:
 - Establish a Centre of Excellence for Learning, Skill Development and Employment;
 - Create and encourage participation in education, training and employment preparation programs and services;
 - Provide opportunities for Yellowknives Dene First Nation members to access and maintain employment at all levels;
 - Provide opportunities for Yellowknives Dene First Nation members to advance into technical, skilled, professional and management positions;
 - Prepare Yellowknives Dene First Nation members for current and anticipated employment opportunities in preparation for self-governance; and
 - Respect traditional and cultural values in learning, skill development and employment programs
- The overall cost of the strategy is estimated at \$10.75 million over five years.
- In 2014, Ndilo and Dettah, with a high school diploma or higher was 51.5% and 41.7%, respectively. This compares to an NWT average of 73.6%.
- Labour force participation rate in Ndilo and Dettah in 2014 was 56% and 69.7%, respectively. This compares to 73.4% in NWT.

Strategic Plan 2014-2019

Purpose: The overall vision for the strategic plan is:

A Healthy and Sovereign Dene First Nation with Excellent Governance

The strategic plan has three themes:

- 1) Investing in the youth



- 2) Securing resources for Yellowknives Dene First Nation's economic future
- 3) Improving governance and communications

Key Takeaways and Economic Considerations:

- Yellowknives Dene First Nation wants recognition of Weledeh lands, resources and treaty rights
- Aims for better Impact Benefit Agreement (IBA) deals and more benefits for the Weledeh people
- Intervention in Canada-GNWT Lands and Resources Devolution Agreement to protect the rights of members
- Need investment in most vulnerable people such as Elders, children, those living in poverty and those suffering from mental health and addictions issues
- Significant emphasis on workforce skills training such as skilled trades, apprentices, leadership skills, management skills and early childhood development education.

Tourism Strategy 2017-2020

Purpose: This is a strategic document that lays out how the development of tourism should be accomplished in Yellowknives Dene First Nation communities. The strategy aims to develop a Yellowknives Dene First Nation tourism industry that offers a differentiated product at a reasonable price and, over time, building the brand and quality of tourism offerings so that profit margins can be increased.

Key Takeaways and Economic Considerations:

- The target markets are cultural explorers and authentic experiences. Targeting people that are seeking out authentic cultural experiences.
- Yellowknives Dene First Nation must control the demand for its services to offer quality and authentic experiences to guests. It can't be all things to all people.
- Tourism operators need time to acquire service skills and knowledge. By offering services to fewer guests at first, they can build their expertise and ramp-up to offer quality experiences to more tourists over time.
- Quality control is integral to a good long-term tourism strategy.
- The strategy recommends starting a Yellowknives Dene First Nation tourism association that would charge an admission fee to visitors and use this fee to develop the tourism industry further.
- There was a plan for a \$25 million luxury aurora viewing lodge near Dettah, but this project has since been put on hold with no definitive timeline for resuming construction.
- Few tourists book cultural experiences in advance of their arrival to Yellowknife. The strategy recommends marketing services to tourists once they arrive in Yellowknife.
- The strategy calls for a visitor information centre in Dettah or Ndilo, a small arts and crafts retail outlet in Yellowknife and multi-lingual signs at the entrance to each community.



City of Yellowknife Document Review

Citizen Survey 2017

Purpose: The purpose of this document is to provide a picture of how residents feel about various aspects of the city. The research objectives of the survey were:

- 1) Identification of important community issues;
- 2) Assess perceptions of the quality of life in Yellowknife;
- 3) Assess perceptions of downtown Yellowknife;
- 4) Measure the importance of and satisfaction with municipal services;
- 5) Assess perceptions of the City's performance overall and in key areas;
- 6) Determine the perceived value for taxes;
- 7) Measure contact with the City and satisfaction with the City's customer service; and
- 8) Gauge interest in participating in various forms of public consultation.

Although the survey is not specifically related to economic development. It relates to economic development, such as perceptions about the quality of life, perceptions of downtown, perceived value for taxes and community issues that are important to residents.

Key Takeaways and Economic Considerations:

- Overall, most citizens (90%+) rate the quality of life in Yellowknife as 'very good' or 'good.'
- Residents identify poverty/homelessness and the high cost of living as reasons why the quality of life is viewed as getting worse over time
- Overall, citizens have a negative view of downtown Yellowknife. The majority of residents disagree with statements that downtown is 'vibrant and exciting, clean and safe.'
- Poverty/homelessness is the biggest social issue identified by residents. The economy, municipal government services and transportation are also issues but much less important than poverty/homelessness
- General satisfaction with City-provided services is high
- Residents don't believe the City is encouraging a diverse supply of housing

Community Plan and Background Report

Purpose: The Community Plan is the long-term plan (15-25 years) for land use planning and development in the City of Yellowknife. The purpose of the Plan is to guide development in the community through a vision, objectives and policies. The vision for the plan is the same as the vision for Council's strategic plan. The plan is informed by a background report that takes into consideration:

- Historical land use development and projected land use development needs, challenges and opportunities (residential, commercial, industrial, institutional etc.);
- Economic, environmental and social goals found in other City strategies and Council strategic plans;



- Demographic trends and projections;
- Economic trends and projections;
- Physical geography; and
- Other relevant data related to land use.

Key Takeaways and Economic Considerations:

- Population growth is projected to be modest. Increase of approximately 2000 residents by 2035 to about 23,000 residents.
- Most land development will be focused on infill within the City's existing built-up areas. Very little greenfield development on previously undeveloped land will occur.
- The plan emphasises improving housing choice through different policies such as incentivizing lot-splitting, encouraging mixed-use development, allowing more density in downtown and surrounding neighbourhoods and relaxing parking restrictions.
- There are policies aimed at improving retail commercial opportunities in the downtown through more flexible zoning, increasing the population living downtown and improving active transportation infrastructure.
- The background report indicates that there has been a shift in employment to public administration and the service sector with relatively fewer jobs in manufacturing and extractive industries. Projections suggest that this shift will continue with proportionally more jobs in tourism, services and public administration versus resource related jobs, particularly in mining.
- Two large former mines (Con and Giant) within City boundaries limit future development opportunity due to contamination on both mine sites. These sites are in the process of being remediated. There is some economic activity related to remediation, but long-term there is uncertainty about what uses would be permitted on these sites.
- Housing affordability and adequacy is a major challenge for many of the city's residents. There is a considerable need for more affordable housing options related to both market and non-market housing.

Council's Approved Vision for the Downtown

Purpose: This document details the vision that Council has approved for downtown Yellowknife. The overall vision is:

Downtown Yellowknife is a lively, welcoming, bright and inclusive Northern city centre that serves its residents and welcomes the world. Downtown builds on our unique culture and history, providing an attractive combination of retail, housing, entertainment, government services, workplaces and public spaces.

The vision has four key aspirations:

- 1) Downtown is vibrant – Diverse shops, restaurants, retail stores and entertainment options make downtown vibrant.



- 2) Downtown is sustainable – It is a supportive, consistent, safe and welcoming environment that maximizes the social, economic and cultural well-being of all people.
- 3) Downtown is accessible – Through active transportation options and public transit, all of Yellowknife is easily linked to downtown.
- 4) Downtown is the heart of our capital – Downtown reflects the heart of the NWT. Downtown is the common bond that ties residents together.

Key Takeaways and Economic Considerations:

There are 5 main goals that contribute to Council's vision for downtown revitalization:

- 1) Coordinate and leverage substantial public sector investment of major planned projects to catalyze private development. This could include providing development incentives, creating a Business Improvement District, allowing higher density residential development and developing a comprehensive parking strategy to meet the needs of downtown workers, businesses and residents.
- 2) Enhance the ground floor environment so that is more attractive for pedestrians and commercial retailers. This could include more art, more street furniture, more programmed space and more aesthetically pleasing street fronts.
- 3) Provide more housing downtown. Adjust zoning to allow more flexibility for housing development. Consider incentivizing downtown residential development.
- 4) Improve connectivity through promotion and improvement of active transportation and public transit.
- 5) Create a downtown for all. Actions can include more public art and beautification, increasing safety and attractiveness by addressing social issues such as homelessness and substance use, supporting cleaner streets and sidewalks through incentives and more waste receptacles and consideration of updating the noise by-law to include a "good neighbour" clause.

Council Strategic Plan 2019-2022

Purpose: The purpose of the Strategic Plan is to set goals and objectives for the Council over 4 years. The document states that the City's vision is:

Yellowknife is a welcoming, inclusive, and prosperous community with a strong sense of pride in our unique history, culture, and natural beauty.

The strategy has four goals:

- 1) Growing and diversifying our economy;
- 2) Delivering efficient and accountable government;
- 3) Ensuring a high quality of life for all, including future generations; and
- 4) Driving strategic land development and growth opportunities.

Although all of the goals are related to the economy, goal #1 and goal #4 are the goals most closely tied to economic development.



Key Takeaways and Economic Considerations:

- The main economic objectives for growing and diversifying the economy are: (1) Fostering a robust and diversified tourism sector; (2) Maximize benefits from an expanded post-secondary institution; and (3) Refresh and implement a Yellowknife economic development strategy.
- The main objectives for strategic land development and growth opportunities are: (1) Diversify development options; and (2) Promote development across the city with a specific emphasis on downtown redevelopment.
- Objectives in the strategy related to climate change adaptation and mitigation, improving public transit, addressing homelessness and developing a master plan for arts and culture also support economic development.

Creating Vibrancy in Downtown Yellowknife: 50/50 Site and Beyond

Purpose: The purpose of this report is to provide high-level strategic guidance on four topics:

- 1) Positioning the 50/50 lot for future success;
- 2) Formation of a City Development Corporation;
- 3) A Downtown Revitalization Strategy; and
- 4) Economic development as a tool for downtown redevelopment.

Key Takeaways and Economic Considerations:

- The report had two main conclusions with respect to the 50/50 lot: 1) For the 50/50 lot to reach its full potential would likely take several years and would also need to be patient and wait for the optimal end-user of that property; and 2) A redevelopment of the 50/50 lot on its own would not solve all of the downtown issues, and a broader look at downtown revitalization is required.
- There are several challenges that make it unattractive for a private developer to develop the 50/50 lot in the short-term including legal uncertainty, complex ownership, zoning complexity and a challenging downtown real estate market.
- The report recommends that the City work to clarify the legal issues, allow more flexible zoning including upzoning and consider development incentives such as reduced development charges or reduction in property taxes.
- The report recommends animating the site with pop-up art, music, or temporary markets in the interim to make the space more active and attractive.
- The report advises that the City investigate the potential of setting up a municipal land corporation but only if it makes sense financially and if it aligns with City strategy
- The report also recommends pursuing downtown revitalization outside of the 50/50 lot. This includes:
 - Incentivizing residential development;
 - Improving pedestrian/cycle connectivity;



- Improving design guidelines for buildings to make them more attractive and pedestrian friendly;
- Supporting creation of a Business Improvement District;
- Discouraging surface parking lots downtown;
- Investing in the public realm;
- Adding density;
- Aesthetic improvements;
- Leveraging the arts for neighbourhood revitalization; and
- Restricting land supply elsewhere that would compete with downtown development
- The report touches on broader economic development such as focusing on economic development where the City has a competitive advantage such as aurora tourism, testing of cold weather technologies, arctic research and sustainable mining.

Downtown Retail Revitalization Strategy 2019

Purpose: The purpose of this strategy is to support the City in working towards increasing the vibrancy of the downtown and successfully re-establishing it as the heart of the city. The strategy identified three challenges that need to be overcome in order for downtown retail to improve:

- 1) Lack of significant new market demand;
- 2) Retail space placement; and
- 3) Social problems.

Key Takeaways and Economic Considerations:

- There is more supply of retail space than demand. However, existing supply of retail space is often not suitable or attractive to prospective tenants.
- There are few contiguous street-level retail spaces and this makes it difficult for retailers to get exposure for pedestrian traffic.
- Improving the streetscape to make it more pedestrian friendly could improve the retail environment for street-front retailing.
- Over-supply of retail space in indoor malls detracts from street vibrancy because customers are inside.
- Social problems in the downtown such as homelessness need to be addressed in order for there to be growth in people visiting downtown retailers.
- Retailers downtown need to differentiate themselves from retailers in suburban locations such as Old Airport Road.
- High proportion of workers (2,700-plus daytime workers) and tourists (115,000 annually) downtown is an opportunity for retailers.
- Lack of an agency or organization dedicated to downtown revitalization is a challenge (business improvement district or downtown business association).
- Built form of street-level buildings is not conducive to street level retail. There are many blank walls.



Economic Development Strategy 2014-2019

Purpose: This document maps out the City’s previous 5 year economic development strategy (2014-2019). The document is a high-level economic strategy that identifies six common themes for the economic development mandate for the City:

- 1) Ensuring that Yellowknife offers a positive customer service environment;
- 2) Providing supports to small and emerging business;
- 3) Establishing Yellowknife’s position as a bold and innovative city;
- 4) Marketing Yellowknife to prospective investors and residents;
- 5) Understanding business needs and the opportunities they are seeking as they grow and develop; and
- 6) Reporting against a clear set of performance measurement indicators.

Key Takeaways and Economic Considerations:

- There is an emphasis on planning and policies to facilitate and promote business development such as incentives, clear regulations and easily accessible information
- Recognition that mining and resource extractions are cyclical industries and greater economic diversification could balance out cycles. Focus on tourism, alternative and renewable energy, enhanced retail sector, and arts and culture.
- Need to attract more residents and workers to live in Yellowknife permanently. Improved downtown retail options, educational and cultural activities could attract more residents.
- A downtown post-secondary campus could be a hub of educational, social and cultural activity in downtown Yellowknife and be a catalyst for other development.

Economic Development Strategy 2020-2024

Purpose: This document maps out the City’s next 5 year economic development strategy (2020-2024). The document is a high-level economic strategy that identifies five goals with multiple strategies for each goal:

Goal	Strategies
Yellowknife is a strong leader and advocates for economic development	<ul style="list-style-type: none"> • Implement an effective governance structure for economic development • Advocate for developments and initiatives that strengthen the Yellowknife economy
Yellowknife features a positive climate for business	<ul style="list-style-type: none"> • Implement a business retention and expansion program • Improve the regulatory environment impacting the development of Yellowknife businesses • Increase access to lands for development



Goal	Strategies
Yellowknife is recognized as a great place to live, visit and invest	<ul style="list-style-type: none"> • Develop marketing and communications strategy • Recruit tourists, investors, workers and prospective residents
The rate of business establishment and development is accelerating	<ul style="list-style-type: none"> • Work to establish an incubator/accelerator • Support business development initiatives • Support the development of local suppliers
Our key economic sectors are growing and becoming further integrated	<ul style="list-style-type: none"> • Mineral industry • Tourism sector • Polytechnic/University • Downtown revitalization • Cold weather testing • Agriculture and food

Key Takeaways and Economic Considerations:

- Stakeholder engagement and a business survey showed that most people are pessimistic about economic growth over the next 5 years. There is a lot of concern about the winding down of diamond mines and a lack of economic diversification to replace the economic activity generated by mining.
- The strategy notes that several of the implementation activities related to the objectives from the previous economic development strategy were never followed through on.
- Strategy calls for more incentives and policies to support growth of businesses such as zoning flexibility, streamlining bylaws and policies, and tax incentives.
- Settling Akaitcho land claim would be a positive step for regulatory certainty although this is out of the City of Yellowknife’s control. City can still play a supportive role and advocate for settling of land claim.
- Getting GNWT controlled land within municipal boundaries transferred to City is a priority
- Downtown revitalization is a priority through parking reform, beautification, improved wayfinding and supporting development downtown.
- A business accelerator/incubator could facilitate early-stage development of new businesses
- Passing hotel levy bylaw should be a priority for the City
- Supporting development of a Polytechnic in the downtown area is a key part of revitalizing the downtown.
- Monitoring the implementation of the strategy will be very important. There should be better tracking of priorities and timelines for implementing tasks within the strategy.



City of Yellowknife Energy Action Plan 2015-2025

Purpose: The purpose of the Energy Action Plan is to:

- 1) Endorse the proposed energy roadmap that will support both the community and the municipality in reaching energy targets;
- 2) Provide the necessary information for City Council to approve energy initiatives that are financially justifiable and environmentally responsible;
- 3) List and review the current energy-efficient capital projects and initiatives implemented by the City;
- 4) Fulfill the reporting requirements of Milestones 2 and 3 of the Partners for Climate Protection Program at both the corporate and community level; and
- 5) Highlight and celebrate the City's ongoing work towards a carbon-neutral, zero-waste city with reduced greenhouse gas (GHG) emissions.

Although the Energy Action Plan is not directly tied to economic development, some aspects are linked to it, such as reducing energy costs and using energy sources produced locally and can support the local economy as opposed to importing fossil fuels produced elsewhere.

Key Takeaways and Economic Considerations:

- Goal to increase the share of renewable energy from 18% to 30% by 2025 for the community
- Increase the share of renewable energy corporately from 50% to 70% by 2025
- The high cost of energy is a challenge for residents and businesses. Efforts to reduce energy consumption may lower the cost of doing business and give residents more disposable income and more revenue for business owners to reinvest in their businesses
- The transition from heating fuel to wood pellet stoves could support preliminary plans in the NWT to develop a wood pellet industry
- Greater organics collection contributes to better soil quality for gardeners and small-scale agriculture producers. Compost from organics can be used to build soil quality

GROW: Yellowknife Food and Agriculture Strategy

Purpose: This strategy is a long-range plan for increasing community and commercial opportunities in Yellowknife's urban food and agriculture system. The five main intentions driving the strategy are:

- 1) Growing the local food economy;
- 2) Growing connections to land, histories, culture and people;
- 3) Growing the level of food security;
- 4) Growing the amount of food that is grown, raised, hunted, fished and foraged; and
- 5) Growing links to regional and territorial food and agricultural initiatives, programs and funding.

There are five goals in the strategy:

- 1) Support the sustainable growth of urban agriculture and related activities;



- 2) Enhance access to urban agriculture basics;
- 3) Support community learning opportunities around food and agriculture;
- 4) Encourage the growth of the Yellowknife food and agriculture economy; and
- 5) Build internal capacity for successful implementation.

Key Takeaways and Economic Considerations:

- The strategy focuses mainly on small livestock, commercial greenhouses, enclosed growing systems, fishing and foraging.
- The average household in Yellowknife spends \$10,456 per year on food. This is \$1800 more than the average Canadian household. If some of that spending is redirected to local food, it could support existing and new local food producers.
- Food and agriculture tourism could contribute to economic development. Consider developing an agri-tourism strategy in order to attract and sustain tourism investment in food and agriculture sectors.
- Recommendation to feature more local food in marketing and branding content.
- Suggestion that the economic development strategy place greater emphasis on food and agriculture.
- Increasing frequency of the farmers market could help producers sell more product. Reduction of fees and charges for vendors could also attract more vendors.
- Amending the bylaw to allow more types of agricultural uses in different parts of the city is recommended. For example, some types of market gardens on residential land should be considered as a permitted use.

Strategic Waste Management Plan 2018

Purpose: The Strategic Waste Management Plan builds on the waste reduction goals of the Corporate and Community Energy Plan summarized above. The main purpose of the plan is to reduce waste through education, improvements in waste diversion/recycling, increasing access to organics collection and various incentives and regulatory mechanisms.

Key Takeaways and Economic Considerations:

- Increasing access to organics collection and improving composting operations could lead to better quality compost that could be used for vegetable growing and other small scale agricultural activities.
- Plan for a feasibility study on a Waste-to-Energy plant in 2022 may lead to economic opportunity if it is deemed feasible. If built, there may be some employment related to construction and operations of the plant.



10 Year Plan to End Homelessness 2017

Purpose: This is a 10 year plan to end homelessness in the City of Yellowknife. The plan has four directions with three goals for each direction:

- 1) Leadership
 - a. Strike a Yellowknife Homelessness Commission at the highest decision-making levels to champion the Plan;
 - b. Increase affordable housing options for Yellowknifers; and
 - c. Engage Yellowknifers in the movement to end homelessness.
- 2) Coordination
 - a. Introduce an Interagency Council to coordinate homelessness services;
 - b. Improve information and knowledge about homelessness; and
 - c. Support the creation of homelessness strategies across NWT communities.
- 3) Reconciliation
 - a. Advance the Calls to Action of the Truth and Reconciliation Commission;
 - b. Embed an Indigenous lens to ending homelessness; and
 - c. Support the enhancement of Indigenous wellness and cultural supports in Yellowknife.
- 4) Healing
 - a. Enhance access to mental health and addiction supports;
 - b. Ensure adequate emergency response capacity is in place to ensure zero exposure to deaths; and
 - c. Develop and implement Northern Indigenous Housing First programs with wrap-around services.

Key Takeaways and Economic Considerations:

- About 20% of households in Yellowknife are in core need meaning housing is unaffordable, not adequate, or not suitable.
- The pace of construction for purpose built rental units is not keeping pace with demand.
- Yellowknife tenants pay one of the highest average rents in Canada.
- The number of people experiencing chronic homelessness is 225. Episodic homelessness is estimated at 300. At high risk or transitional homelessness is estimated at 975.
- In many cases it is cheaper to house and support people than it is to manage their homelessness through emergency responses involving police, shelters, hospitals and jails.
- The Plan calls for a minimum of 180 affordable housing spaces (about 90 two-bedroom units) in addition to 200 rent support spaces.
- There is a need for both market affordable housing (incentivized by zoning flexibility and developer incentives like fast-tracking applications) as well as non-market affordable housing built by government agencies, housing corporations and non-profit organizations.



Tourism Strategy 2015-2019

Purpose: This is the City's 5 year tourism strategy. The strategy identifies 3 goals with several associated actions:

- Enhance Yellowknife's tourism management and partnership model;
- Increase destination awareness; and
- Improve community tourism infrastructure and services.

Key Takeaways and Economic Considerations:

- Each tourism goal has several associated actions for the 5 year duration of the strategy. Broadly, the actions involve:
 - Continued cooperation with the GNWT and Indigenous organizations to promote tourism including the ability to levy a tourist accommodation tax to support marketing and festivals;
 - Support growth of conference tourism and improve branding and marketing; and
 - Improve signage, wayfinding resources and continuing revitalization of downtown
- The report highlights the fact that aurora tourism has experienced significant growth and that support for this type of tourism should be increased
- Other opportunities include more festivals and events, encouraging more Aboriginal cultural tourism, incorporating local artisans into tourism, developing fishing potential of Great Slave Lake, promoting Old Town character and history and cleaning up and beautifying downtown.

Visitor Service Strategy 2018

Purpose: The Yellowknife Visitor Services Strategy is a plan of action to support and implement a new and effective visitor services model that will provide guidance towards a long-term and adaptable solution with the ability to influence visitor behaviour and positively contribute to the vibrant tourism industry in Yellowknife, the Great Slave Region and Northwest Territories.

The strategy does not provide a specific recommendation for a visitor's centre but suggests that there are five different options that might work each with their own strengths and weaknesses:

- 1) Iconic Gateway Visitor Centre;
- 2) City Central Visitor Centre;
- 3) Public Building Visitor Centre;
- 4) Construction of New Visitor Centre; and
- 5) Decentralization (no bricks and mortar central visitors centre).

Key Takeaways and Economic Considerations:

- The strategy suggests that a city central visitor centre using existing space potentially in association with the Yellowknife Chamber of Commerce would be a good option because it would be downtown, cost-efficient and build on other synergies in the downtown area.



- A high visibility and accessible visitor's centre would improve the experience for visitors and complement other efforts to revitalize the downtown.
- Getting the governance model right for the visitor's centre is very important. It should be accountable to a Tourism Advisory Committee with members appointed by City Council and representative of a cross section of tourism-related businesses.

Yellowknife Airport Five-Year Business Plan 2018-2019 to 2022-2023

Purpose: The purpose of this plan is to provide a strategic plan over a five year timeframe for the Yellowknife Airport. There are six strategic goals associated with the plan:

- 1) Operate a safe and secure Airport that serves the North;
- 2) Proactively engage with aviation partners, airport stakeholders and Northerners;
- 3) Operate in a financially responsible manner, enhance operational efficiencies and deliver exceptional services and facilities;
- 4) Maintain a modern, healthy, transparent and accountable work environments;
- 5) Enhance air service and expand connectivity with the North in support of communities, tourism and economic development; and
- 6) Identify and promote Airport development in support of aviation, logistics and commercial opportunities.

Key Takeaways and Economic Considerations:

- The airport recently moved from a government funded model to a self-sustaining model whereby the airport collects its own fees and reinvests it back into maintenance and operation of the airport (Revolving Fund structure).
- The new Revolving Fund structure is projected to fund all airport operations and generate a surplus that will be re-invested into capital improvements.
- More than 1000 people are employed on the YZF airport campus and it supports 2000 indirect jobs.
- The airport produces over \$170 million in GDP and activity at YZF contributes over \$45 million in various taxes.
- The City of Yellowknife does not control the airport but receives transfers from the GNWT in lieu of municipal taxes as well as taxes directly from YZF tenants.
- Over 575,000 passengers passed through YZF in 2016 up 7% from 2015. This number was 645,000 in 2018.
- Direct flights to major Canadian cities of Edmonton, Calgary and Vancouver and serves as a hub for both passenger and cargo related aviation in the NWT.
- The airport is actively trying to attract one-stop flights from Asia to Yellowknife to expand tourism opportunities.
- Cold weather testing for new aircraft and other aviation related equipment is another growing economic opportunity for the airport.



Yellowknife Business Incentive Strategy and Business Incubation Strategy Framework 2015

Purpose: This document provides a strategy framework for business incentives and business incubation. With respect to business incentives, the recommendations are:

- Identify business incentive activities that will enhance the overall health and sustainability of Yellowknife's business community; and
- Identify development incentives, as applicable, that will contribute to the achievement of specific development objectives and/or will help address specific development constraints, as they relate to 50th Street and Downtown Revitalization.

The recommendation for the business incubator is:

- Identify the next steps that the City can take regarding a small business incubator for Yellowknife based on input from small start-up and home-based businesses

Key Takeaways and Economic Considerations:

- Current City of Yellowknife Residential Development Incentive Programs:
 - 1) Property tax abatement for residential construction or adaptive re-use of existing buildings, including ground floor commercial improvement or development in the downtown. This is 100% tax abatement for 5 years with potential for additional 5 year abatement based on revitalization merits of the project.
 - 2) Property tax abatement for secondary area of city outside downtown with a declining tax abatement over 5 years (Year 1 – 100%, Year 2 – 80%, Year 3 – 60%, Year 4 – 40 %, Year 5 – 20%).
- There are also various development incentives using tax abatement for industrial relocation to the Engle Business District, a brownfield redevelopment incentive and a Leadership in Energy and Environmental Design (LEED) incentive. These are all declining property tax abatements over 5 years.
- There are other tax abatement incentives for heritage preservation, integrated parking structures, downtown multi-storey or below ground parking structures.
- The City also offers rental rate reductions for groups interested in using City property to generate business.
- Five strategies were given for business incentives for the overall Yellowknife business community:
 - 1) Continue to have a business-friendly, customer-service culture at City Hall;
 - 2) Enhance awareness of development requirements and market conditions;
 - 3) Support information sharing and business networking opportunities;
 - 4) Investigate the business licensing requirements for mobile, direct-selling and home-based businesses; and
 - 5) Undertake marketing and communications initiatives that support and celebrate local and home-based businesses.



- There are two incentive strategies for downtown specific businesses:
 - 1) Implement initiatives that complement downtown revitalization goals; and
 - 2) Enhance the City's downtown-focused development incentive programs.
- 8 steps were identified to facilitate the establishment of a physical business incubator;
 - 1) Identify the ideal mix of incubator facilities and services for Yellowknife;
 - 2) Research the availability and cost of suitable incubator space;
 - 3) Prepare high level financial projections for the incubator;
 - 4) Create a basic business plan for the organization;
 - 5) Identify and pursue capital/start-up funding sources;
 - 6) Establish the governance structure and board of directors for the organization;
 - 7) Hire a business incubator manager; and
 - 8) Develop and launch a website, programs and initial networking events.

Joint City-First Nation Initiatives

Yellowknives Dene First Nation and City of Yellowknife Joint Workshops Outcomes and Objectives 2019

Purpose: There were two workshops with the Yellowknives Dene First Nation and the City of Yellowknife. The first workshop was a validation and needs assessment. There were three objectives of this workshop:

- 1) To conduct a joint community needs assessment;
- 2) To initiate the process of relationship-building between the First Nation and municipal staff and elected officials and assess the level of commitment/ engagement and need for participation in the Community Economic Development Initiative (CEDI) program
- 3) To help facilitate the process of council resolutions committing to the CEDI program by clarifying CEDI for elected officials.

The second workshop had four objectives:

- 1) To continue the process of relationship-building between the First Nation and municipal staff and elected officials
- 2) Identify lessons learned from past experiences with economic development strategies
- 3) To review the what, why and how of the Joint Economic Development Strategy and finalize the Terms of Reference (TOR) for the Request for Proposal (RFP) process
- 4) Develop a shared vision for the partnership.

Key Takeaways and Economic Considerations:

- Workshop #1
 - Focused mostly on learning from each other and relationship building. There were several exercises to help Yellowknives Dene First Nation and City of Yellowknife to learn about each other's history and community context



- Yellowknives Dene First Nation and the City of Yellowknife shared their planning documents, strategic priorities, existing economic development strategy and other important factors that guide their respective communities.
- Workshop #2
 - Both parties wanted Specific, Measurable, Achievable, Relevant and Time Bound (SMART) goals in the economic development strategy
 - Wanted risks identified with a clear plan on how to mitigate risks
 - Wanted outside the box thinking and creativity
 - Concerning cultural tourism, it needs to be authentic and wanted to tell their own stories, so others don't sell the culture



Appendix F: PlaceSpeak Survey Results

PlaceSpeak Survey Results

As a part of the Yellowknife and Yellowknives Dene First Nation Joint Economic Development Strategy, an online open-response survey was carried out using PlaceSpeak³⁵ – a community engagement platform. This survey was open from June-August 2020 and received a total of 68 complete responses. The survey asked the community questions about their opinions of the joint economic development efforts of the City of Yellowknife and the Yellowknives Dene First Nation.

The majority of respondents to the survey were residents of Yellowknife (38 respondents). There was also a good representation from Dettah (14 respondents) and Ndilo (11 respondents).

Figure 49: I am a resident of...

Response	Count
Dettah	14
Going to school in Victoria, BC.	1
Ndilo	11
Yellowknife	38
Total	64

*Note that although there were 68 total responses, some individuals left questions blank, which led to a total of less than 68.

Approximately half of the respondents (30 total) identified as a band member of the Yellowknives Dene First Nation.

Figure 50: Do you identify as a registered band member of the Yellowknives Dene First Nation?

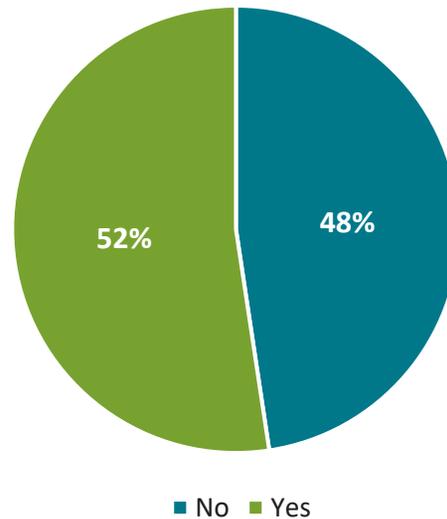
Response	Count
No	34
Yes	30
Total	64

³⁵ <https://www.placespeak.com/en/>



Over half of the respondents (52%) reported that they had been aware of the Memorandum of Understanding between the City and First Nation, which identified shared interests, including economic development, prior to the survey.

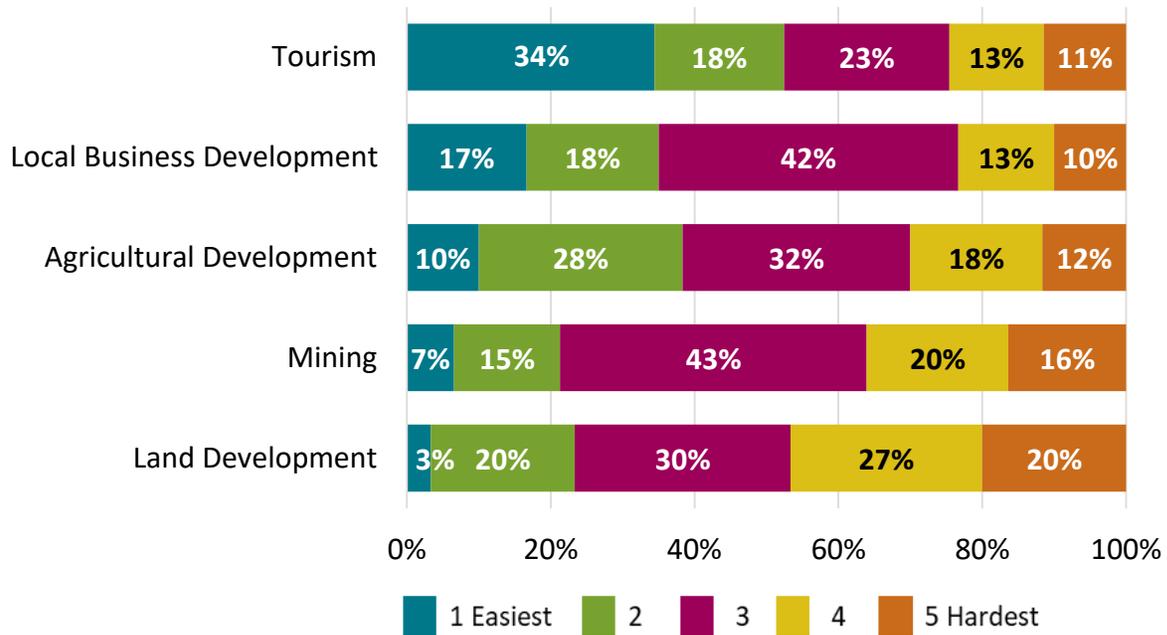
Figure 51: Before this survey, were you aware of the Memorandum of Understanding between the City of Yellowknife and Yellowknives Dene First Nation, which identified shared interests, including economic development? (n=64)



The respondents rated the various economic development activities based on how difficult they expected it for the City and the First Nation to work together. Tourism and local business development were the most often rated as a 1 (easiest) or 2. Land development and mining were the priorities that were most often rated as a 5 (most difficult) or 4.



Figure 52: On a scale of 1 to 5, with 1 being the easiest and 5 being the most difficult, how easy would it be for the City of Yellowknife and the Yellowknives Dene First Nation to work together on each shared economic priorities? (n=64)



Respondents also included some other options for the City and the First Nation to work together on shared economic priorities. The responses are outlined in the figure below. Renewable energy, housing and educations are some key themes, among others.



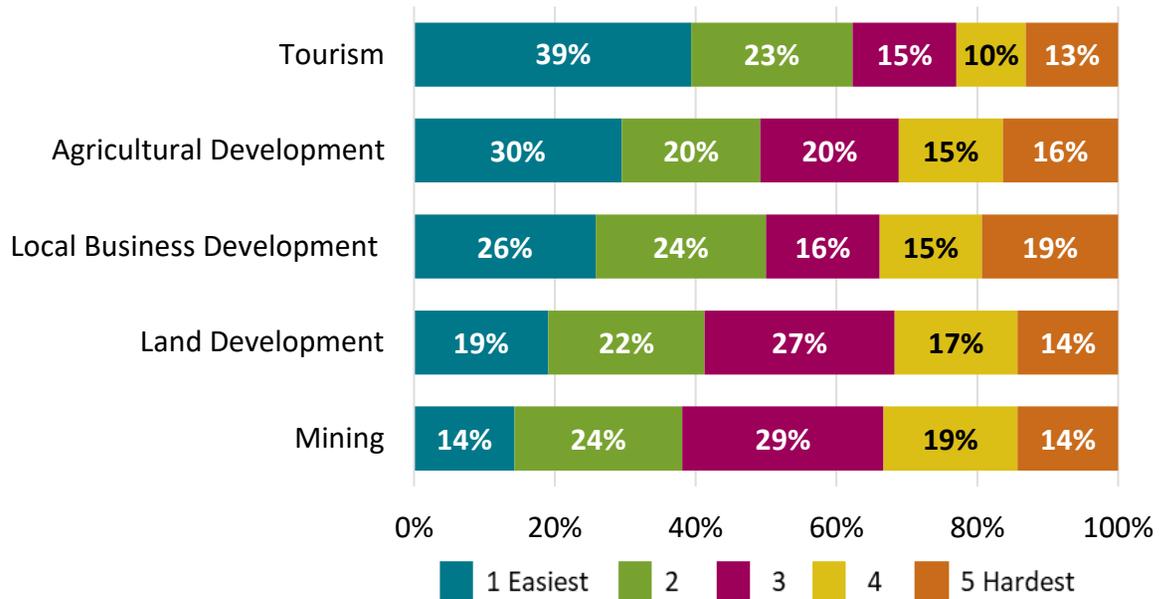
Figure 53: What other opportunities exist for the City of Yellowknife and the Yellowknives Dene First Nation to work together on shared economic priorities?

Response
Church
The city needs to work with YKDFN and have lots of meetings.
Education - technical university
Housing
Indigenous education in all schools
Outdoor activities archery, farming, hunting, tree planting, camps, carpentry, skidooing, fishing, logging? How to build tipis and igloos, trampoline parks, skate park. People are bored. There is nothing to do in Yellowknife, that's why I left when I turned 19.
People from the City need to know more about our way of living, and our Traditional Values and Traditional Knowledge and our history of our land before this were Yellowknife.
Recycling or energy ideas
Renewable energy
Renewable Energy Resources, get Yellowknife, Dettah and Ndilo 100% clean energy, localize internet services
Renewable energy, and focusing specifically on developing YKDFN businesses in addition to the more general focus on local businesses
The houseboats must be removed - pollution in the water
To get youth and adults educated for jobs

Respondents also rated the factors expected to have the highest potential for improving the local economy for Yellowknives Dene First Nation members and the City of Yellowknife residents. Tourism was the most highly rated option. Agricultural development and local business development also received more positive responses (either 1 or 2) than they made neutral or negative responses. The responses were segmented for land development and mining, with substantial representation of responses in all parts of the spectrum from positive to negative.



Figure 54: Which joint economic priorities have the highest potential for improving the local economy for Yellowknives Dene First Nation members and the City of Yellowknife residents, in your opinion? Rank the priorities from 1 to 5, with 1 being the highest potential and 5 being the lowest potential. (n=64)



Some respondents provided other economic opportunities that they felt the Yellowknives Dene First Nation and the City of Yellowknife should be collaborating on more closely. Infrastructure, education, renewable energy and traditional activities were some of the common themes observed in the Figure below.



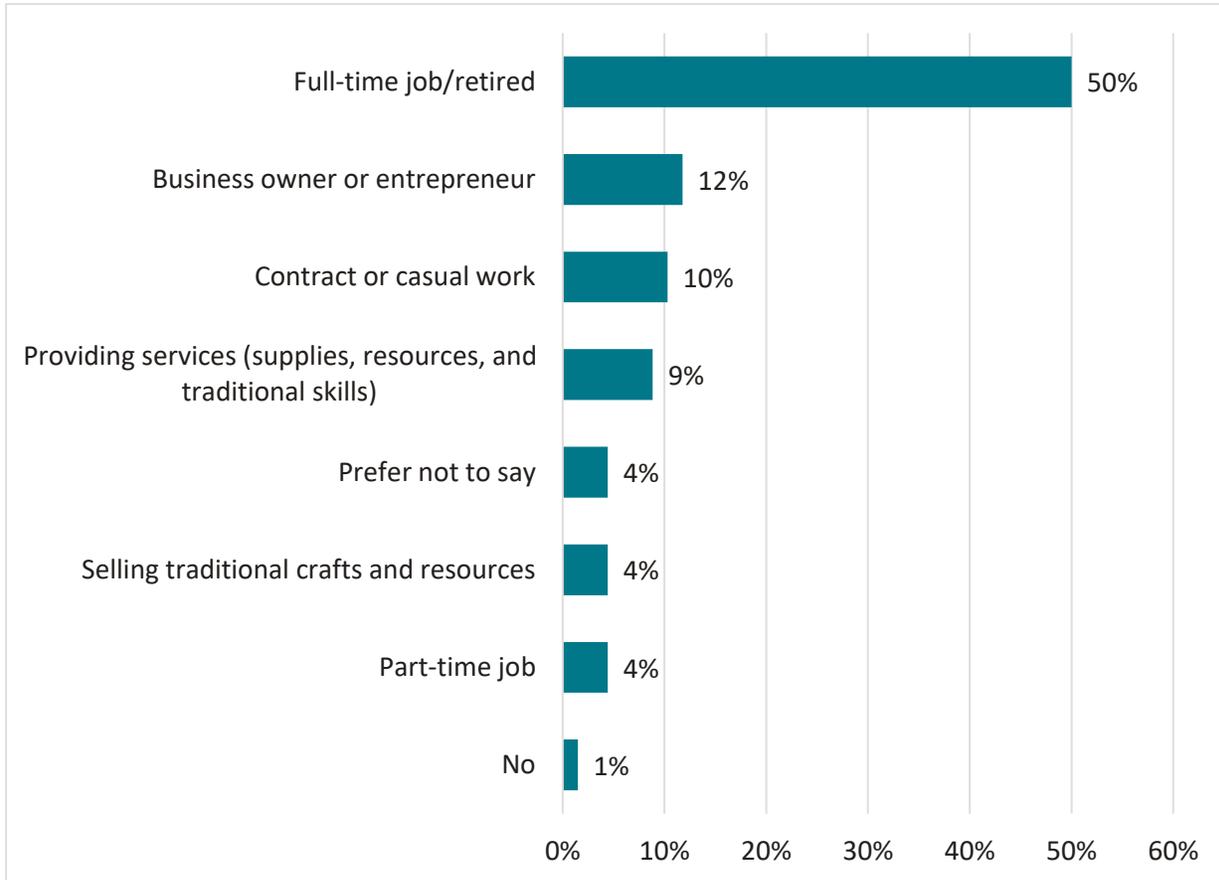
Figure 55: Are there other economic opportunities that you feel the Yellowknives Dene First Nation and the City of Yellowknife should be collaborating on more closely, in addition to the ones listed in [the previous question]? If so, please explain.

Response
Fishing and guiding (1); Arts and Crafts (3); Wood business (3). Include young ones and teenagers.
Arts/cultural
Build a 100% autonomous system. Why do we rely so heavily on shipped goods? Where are the farms, the solar plants, the wind plants? Build a compost farm. Build the best damn recycling plant the world has ever seen. Build a gymnasium that is free so the youth can hang out and exercise and meet each other playing dodgeball/volleyball for free. Free education.
Education - technical university
Indigenous education in all schools
Infrastructure and housing
Invest in youth and adult education based on "on the job" training through local jobs in all communities for a start to build a sense of prosperity for each YKDFN member.
Manufacturing of renewable resources. Green initiatives.
Renewable energy
Renewable Energy Resources, get Yellowknife, Dettah and Ndilo 100% clean energy, localize internet services
Renewable energy, and focusing specifically on developing YKDFN businesses in addition to the more general focus on local businesses
Tourism - The City and YKDFN can work together for YKDFN to have their own business - Aurora viewing in Dettah and Ndilo location. Also to promote way of life all season. Run a ferry from Ndilo to Dettah to promote our way of life and make money for our people. Lands Jolliffe Island get rid of houseboats and houses currently there. Make cabins for tourists to learn and experience our way of life. Hand games demonstrations, cut, clean and cook fish on the fire. More activities like trapping demonstrations, hand games, singing, aurora viewing, dog sledding and ice fishing.
Water guardians
YKDFN needs more control over its land and the City can help to educate the City residents with understanding the difficulty with squatting, houseboats and so on.

Respondents to the survey listed the various ways they participate in the economy, with the option to select multiple responses if they participated in multiple ways. Half of the respondents mentioned working in full-time jobs or being retired. Further, 12% noted being business owners/entrepreneurs and 10% reported participating through everyday work. Only 1% of the respondents identified that they do not participate in the economy.



Figure 56: Do you participate in the economy? If so, how? (Select all that apply) (n=64)



Some individuals added in additional factors which they felt would help them participate more fully in the economy and their responses are listed below. Workshops, business/community supports and promotion of local culture/services were some of the common themes identified.

Figure 57: What would help you participate more fully in the economy?

Response
A business license and a permit to build.
A lot of YKDFN members are on income support program because of health reasons and cannot work a regular job or part-time jobs, so to help these people, can offer gift certificates for any services (traditional skills or even cleaning jobs, etc.) would help a lot.
Better food halls I can volunteer to feed or elders and homeless. Give them jobs and teach them culinary so they can eat. Give them skills to help them stand on their own.
I can help by teaching my grandchildren the traditional Dene way of life through our history, our language. Respect our land.
More local businesses with needed services.
Workshops/Training
YKDFN needs more support from the City of YK on jobs.



The survey respondents also provided additional comments in a final open-ended question. The table below shows the comments that were provided. These responses were left in their own words, to avoid blurring their message.

Figure 58: Is there anything else you would like to share?

Response
A lot of YKDFN need assistance with just basic living day to day activities and basic healthy foods, healthy lifestyle living. Most population (YKDFN Members) have alcohol and/or drug-related problems, and that's an added challenge to all YKDFN members.
Also selling traditional arts and crafts should be located in Ndilo Tourist shop in Ndilo and some only in Yellowknife a few days.
Concerned about young people. Encourage young ones to own businesses.
Funded daycare facilities to allow for people to go to school.
I am all for development - but not at the expense Of those already living in Yellowknife or the businesses already established and paying the high taxes they pay - or those with residential properties that would also be affected by agriculture uses or even tourism. The city needs to keep in mind the development ideas and plans they promised to local residents and the planning Vision they used to sell people the various properties in and around the city. No surprises and no changes that would affect the property values or rights of those who live in this city and pay the taxes to keep it running.
I am pleased to see this partnership, and hope it to be fruitful for all.
I can't get a business license where I live because the property hasn't gone through probate yet. Are probate laws municipal? Because that's red tape.
I didn't answer the question on how easy would it be for the city to work with YKDFN on the different categories because I don't know what the hurdles are.
I personally think that downtown should be updated with regards to the center square mall. You should buy the building from out of town owners and make it into a college facility and or actually make it into a real mall. Should include a food court and seating area, variety of business that's beneficial to city. It is horrible currently and presents issues with moral. Variety of homeless people who drink openly downtown by City Square Mall and panhandling and then upset or curse if you say no. It is also bad as this Capital City of the North and happens when we had tourists. Anyways I believe Yellowknife has potential to become a even greater City if we can eliminate empty buildings, have more programs for local owners, control our downtown from panhandling and create more affordable and efficient services that people want. Anyways, those are some ideas and concerns I have as a Yellowknife residence.
I think local business and tourism opportunities are the strongest way to build an ENDURING shared economic development. I recognize that mining, land development and other resource are likely most profitable. But they don't include community members at all levels and they don't have the same opportunity for many community members to develop lasting and proud ownership over partner businesses. I also think land and resource development will nearly always be much more contentious in nature and have opposition, and possible unintended long-term negative consequences in terms of relationship building, trust and environmentally.



Response
I think that this survey was worded difficultly. English + internet access is not readily available to some YKDFN Elders/citizens and also to certain Yellowknife citizens. Please consider other options for getting input from the community and prioritize hearing from our community!
If the City is prepared to honour treaties that are in place then land issues should not be overwhelming. The Dene will either choose to negotiate or they won't. Treaties/land claims must be honoured.
Neither party should be required to take the financial lead. This needs to be a partnership with each party bringing it's available resources to the table.
Discussions need to be, as much as possible, transparent so the members of each community know the tone and level of cooperation in discussions.
Securing land tenure for both YKDFN and City of Yellowknife has the largest potential benefit in the near term to unlock economic potential. Security of tenure, access and ownership issues around land are one of the largest barriers to business expansion and developing alternative and diversified businesses in and around Yellowknife.
Support healthy access to food. Healthy access to ecosystems. Territorial acknowledgement, such as "You are now entering YKDFN Territory". Is there going to be any lost revenue accumulated through the City given to YKDFN in compensation to lost land entitlement from developments? Rename buildings, locations, parks with local cultural aspects, not just using leadership names (that is a colonial aspect). Give areas more cultural meaning.
The City needs to be open minded in how it can take actions that benefit the economic development of the YKDFN and its members
Think about something other than what goes in your pocket and work on our community. Our kids. You know, the future. Money is irrelevant, teach our youth how to live happy lives and the money will flow naturally. They want to make money. They don't have the skills though because they can't afford the 40 debt I put on myself so I can learn basic cooking and game design/media arts.
Traditional/cultural. Polar bear at YK airport - not in this area.
We need a church. We need a thing for the young kids to focus their lives.
We sit against a Great Lake. YKDFN and Yellowknife working together to design, build, operate and maintain a marina would meet a lot of the objectives of this MOU. Boat and float plane slips and service, big boats to kayaks, encouraging people to get out on the water. Food, fuel, tourism, fisheries. Build it at the cross country ski lands, so in the winter it can stay open and service skiers, snowmobiles, dog teams, fisheries and tourism. Ensure YKDFN have a big role in the design, and also shadow in the Giant Mine lessons learned in the architecture so that story is remembered. A jointly designed, built, operated and maintained marina would meet most of the objectives of this MOU. Working jointly like this is the way NWT moves forward.
Work with YKDFN on All Plans.
YKDFN and City has lessons on collaboration and which ideas have more success and ease. Perhaps bring and show those successes. Mahsi.
YKDFN and the City needs to understand our hardship when it comes to dealing with lands, water rights, the Giant mine, NWT Government and land claims.



Appendix G: Business Satisfaction Survey Results

Business Satisfaction Survey Results

A Triage BR+E Survey was commissioned to engage the broader business community, while also allowing for the identification of potential expansion or retention opportunities in the City of Yellowknife, Dettah and Ndilo, for follow-up on a business-by-business basis.³⁶ The survey results were compiled into a presentation which is included in this section.

Methodology

- A random sample telephone survey was conducted with 100 businesses out of an initial sample of 1052 businesses. The rigorous survey approach resulted in a response rate of 19.7%, which is extremely high in the market research industry, where response rates average in the 1%-2% range.
- This scientific approach ensures that the results have a high level of accuracy and statistically represents the business community in Yellowknife.

The key findings of this exercise are summarized below, with the full Business Satisfaction Survey report provided separately.

- Overall, business satisfaction in Yellowknife is strong at 86%, with 35% very satisfied and 51% somewhat satisfied.
- 41.7% indicate their level of satisfaction is more positive than 12 months ago, compared to 9.2%, indicating more negative, representing a net improvement of 32.5%.
- Businesses were asked to rate their satisfaction on 20 different factors affecting their business performance. Only 2 of these factors had a satisfaction level of less than 50% satisfaction.
- The factors with the lowest levels of satisfaction were: Availability of adequate housing, Availability of public transit service, Availability of skilled labour, Availability of unskilled labour.
- When considering what factors are statistically most likely to lead to improved business satisfaction, the top priorities are Availability of adequate housing, Availability of public transit service, Availability of skilled labour, Availability of property for purchase or lease. Addressing these top-priority business factors through review, adaptation, or sustained attention is most likely to lead to higher business satisfaction.

³⁶ Triage BR+E is a telephone-based survey of businesses in a community, developed by MDB Insight, which provides pertinent information to help local governments expand and retain the local business base.



City of Yellowknife & YKDFN Triage BR+E



CITY OF YELLOWKNIFE

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Background

As part of the Joint Economic Development Strategy between the YKDFN and City of Yellowknife, a Business Satisfaction Triage BR+E Survey was undertaken to understand business health. Business retention and expansion (BR+E) activities can be employed to ensure business needs are monitored and addressed; however, engagement can be time consuming and complex.

A Triage BR+E Survey was commissioned to engage the broader business community, while also allowing for the identification of potential expansion or retention opportunities for follow-up on a business-by-business basis.

Methodology

- A random sample telephone survey was conducted with 100 businesses out of an initial sample of 1052 businesses. The rigorous survey approach resulted in a response rate of 19.7% which is extremely high in the market research industry where response rates average in the 1%-2% range.
- This scientific approach ensures that the results have a high level of accuracy and statistically represents the business community in Yellowknife.

This Report represents the findings of the survey exercise.

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- Overall business satisfaction in the region is strong at 86% with 35% very satisfied and 51% somewhat satisfied.
- 19% indicate their level of satisfaction is more positive than 12 months ago, compared to 23% indicating more negative; representing a slight net decrease of 4%.
- Businesses were asked to rate their satisfaction on 16 different factors affecting their business performance. Only 2 of these factors had a satisfaction level of less than 50% satisfaction.
- The factors with the lowest levels of satisfaction were: Internet service, availability of post secondary programming that aligns with business needs, availability of skilled labour, and the development/building permit process.
- When considering what factors are statistically most likely to lead to improved business satisfaction, the top priorities are: internet service, availability of post secondary programming that aligns with business needs, availability of skilled labour, and availability of adequate housing
- Addressing these top priority business factors through review, adaptation, or sustained attention are most likely to lead to higher business satisfaction.

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Key Findings

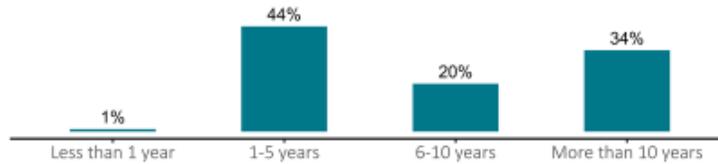
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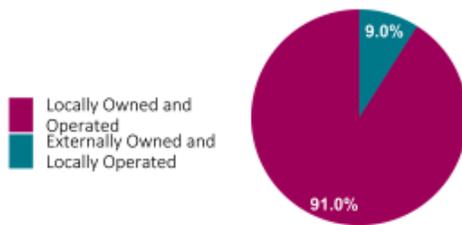
YKDFN & City of Yellowknife Business Profile



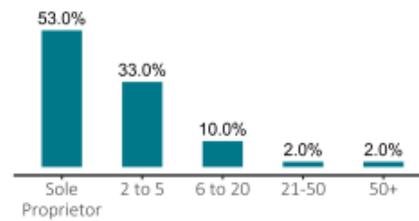
Years Operating in Region



Business Ownership



of FTEs



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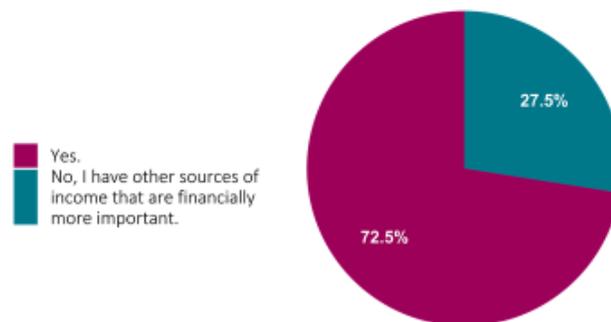
n=100 respondents



Yellowknife Business Profile

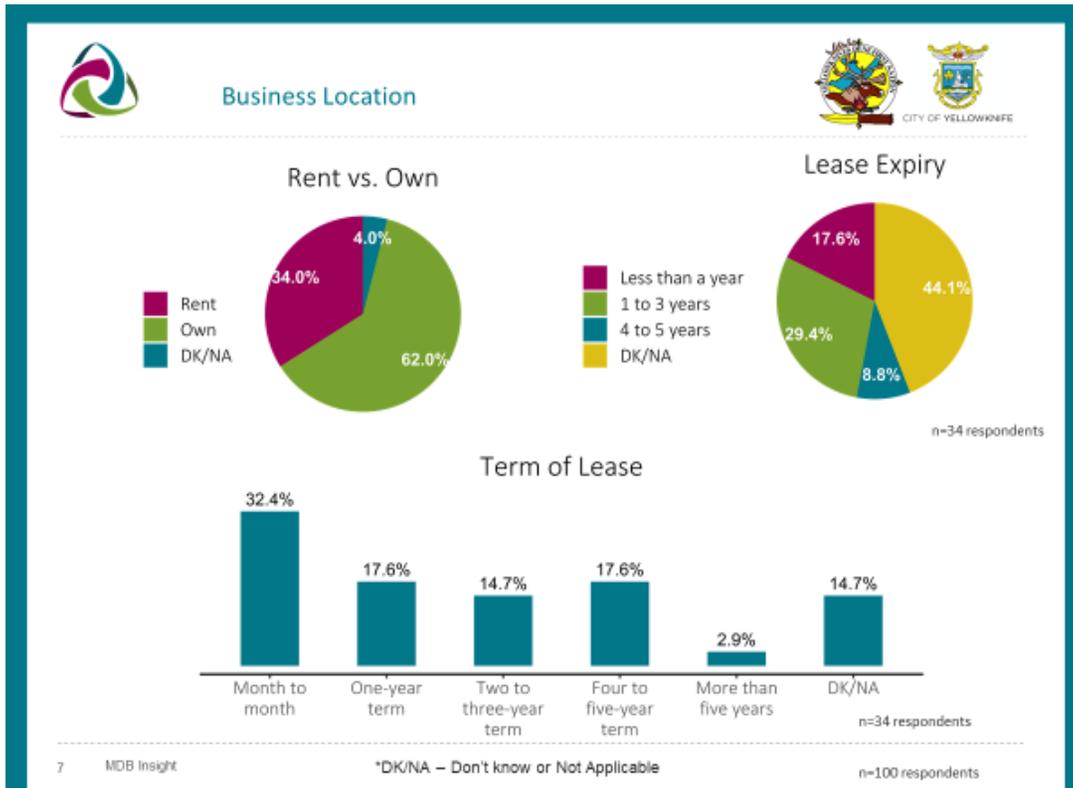


Is your business your primary source of income?



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n=91 respondents



Overall how satisfied are you with the region as a place to own and operate a business?

Over the past 12 months would you say your attitude about doing business in Yellowknife/Dettah/Ndilo has...

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The combined overall satisfaction is strong at 86%.
The net impact of changes over the past year is -4%



Overall Satisfaction



Very Dissatisfied Somewhat Dissatisfied Somewhat Satisfied Very Satisfied

Attitude Over the Past 12 Months



More negative The same and has not changed More positive

Net Improvement score = % more positive (19%) - % more negative (23%) = -4%

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n=100 respondents



Revenue



Sales Over the Past 12 Months



Decreasing Stayed the same Increasing

Expectations for the Next 12 Months



Lower The same Higher

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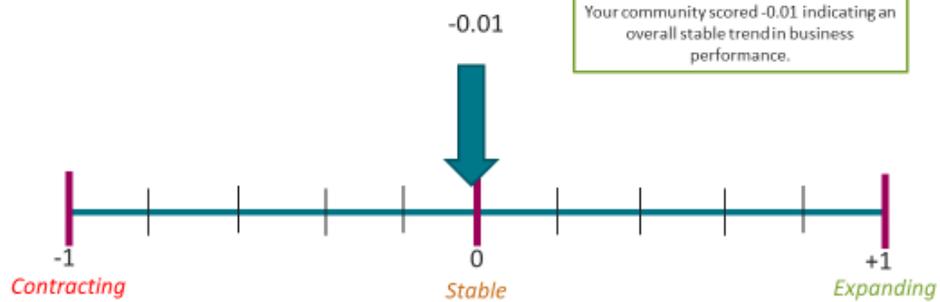
n=100 respondents



Business Performance Forecast



The Business Performance Forecast is a metric created by combining the three business performance questions.



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n=100 respondents



Performance of Business Factors



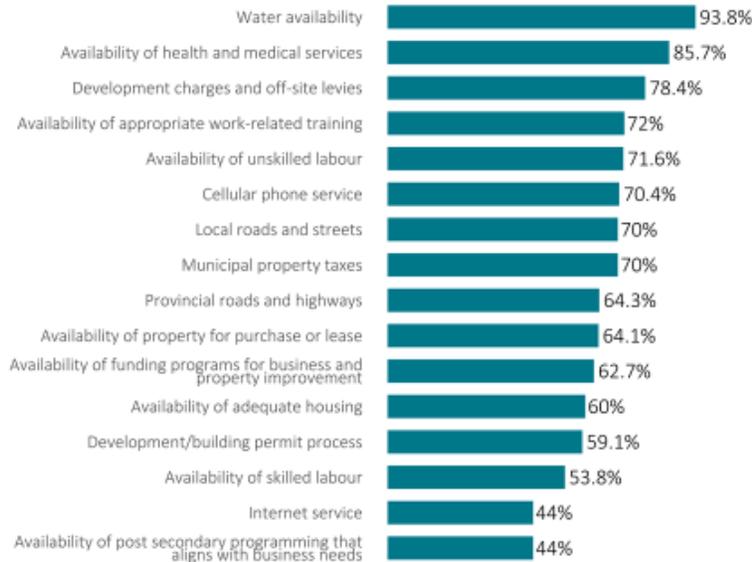
How satisfied you are with each of the following factors of doing business in the region?

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Performance of Business Factors

Each local factor was ranked by businesses on a 4-point scale:
Very dissatisfied, somewhat dissatisfied, somewhat satisfied, or very satisfied



The performance represents the proportion of businesses choosing either 'Very Satisfied' or 'Somewhat Satisfied'



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n=100 respondents



Derived Importance: Understanding which business factors will have the greatest impact on overall business satisfaction.

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Priority Matrix



Variable	Level of Importance	Performance	Priority Rank
Internet service	7.5	44%	1
Availability of post secondary programming that aligns with business needs	6.3	44%	2
Availability of skilled labour	7.2	54%	3
Availability of adequate housing	7.5	60%	4
Availability of funding programs for business and property improvement	7.5	63%	5
Provincial roads and highways	7.2	64%	6
Availability of property for purchase or lease	6.4	64%	7
Development/building permit process	5.2	59%	8
Local roads and streets	6.8	70%	9
Cellular phone service	6.4	70%	10
Availability of unskilled labour	6.1	72%	11
Availability of appropriate work-related training	6.1	72%	12
Municipal property taxes	5.2	70%	13
Development charges and off-site levies	5.3	78%	14
Availability of health and medical services	6.8	86%	15
Water availability	8.3	94%	16

↑ Higher Priority

↓ Lower Priority

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n=100 respondents

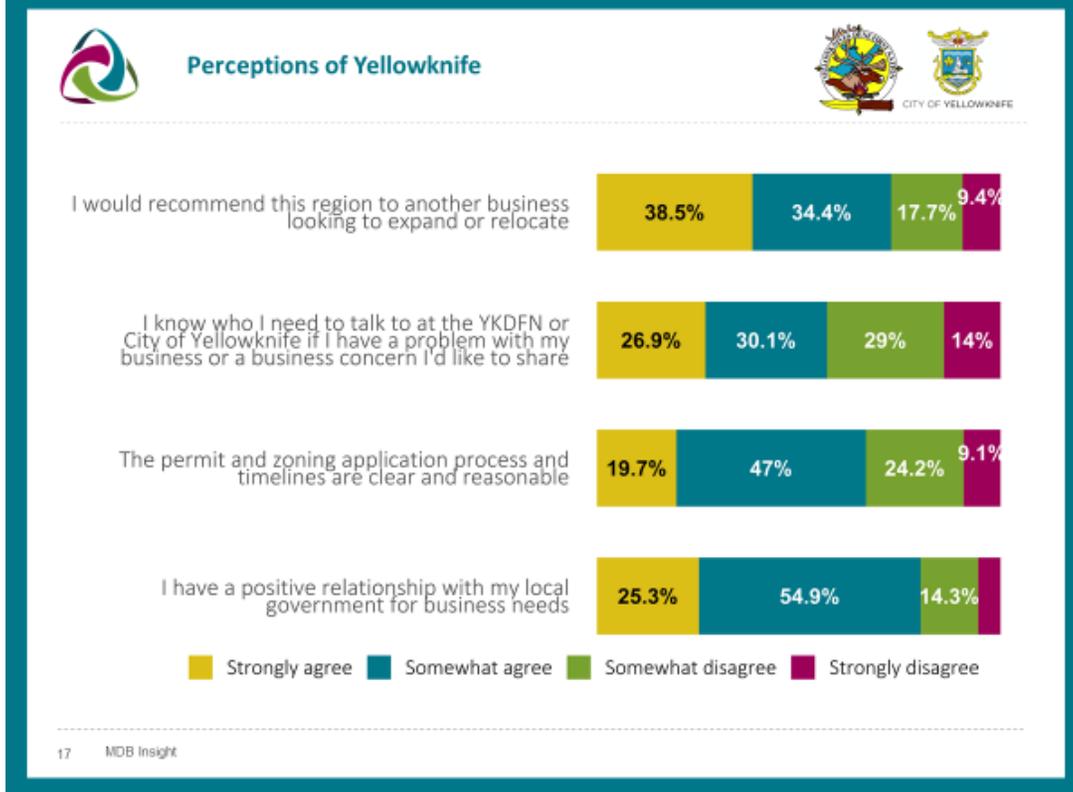
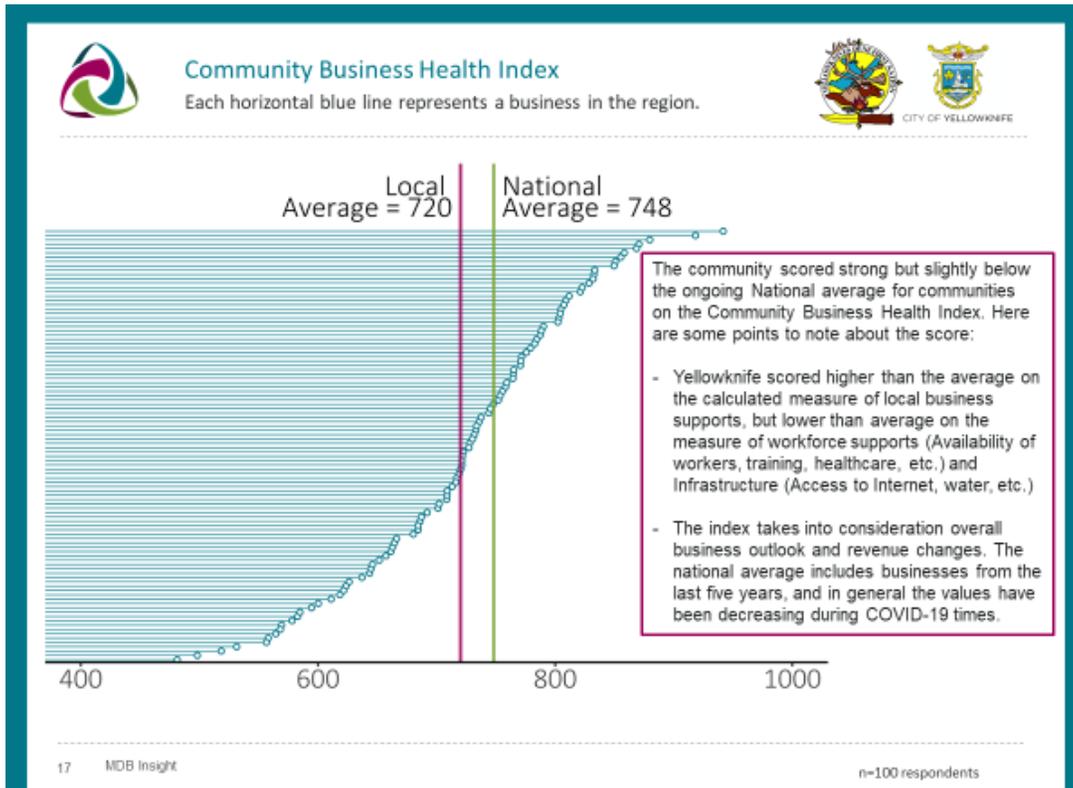


Community Business Health Index

Using the results of this business survey, MDB Insight combines the questions into a Community Business Health Index using the following nine sub-scores:



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Net Promoter Score: Based on response to the following statement – “I would recommend this region to another business looking to expand or relocate.”

Group	Definition	Response to question
Promoters	Active proponents of the community	Strongly Agree
Passives	Neutral businesses	Somewhat Agree
Detractors	Businesses with a negative opinion that may harm branding efforts	Somewhat Disagree or Strongly Disagree

19 MDB Insight

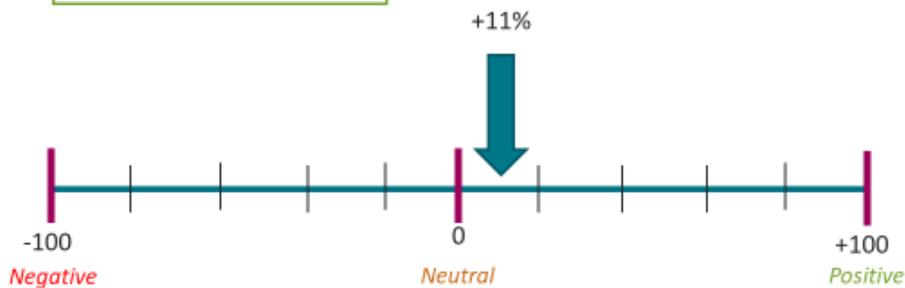


Net Promoter Score



The Net Promoter Score is a representation of the level of positive word-of-mouth promotion of the community. The measure subtracts the proportion of detractors in the survey respondents from the proportion of promoters.

The Net Promoter Score was +11% indicating more positive proponents of the community than negative.



19 MDB Insight

n=100 respondents



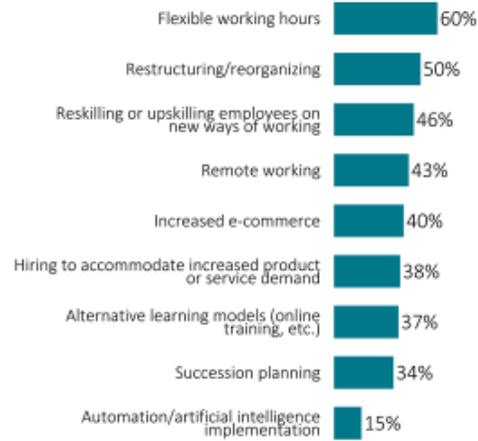
COVID Response



Which of the following measures did you take in response to COVID-19?



Moving forward after the COVID 19 pandemic, which of the following priorities do you plan to implement as a direct result of the pandemic?



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n=100 respondents



Resiliency and Adaptability



Overall, I feel confident in my businesses' level of resiliency to operate through a short-term crisis like the COVID 19 pandemic.



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n=100 respondents



Resiliency and Adaptability



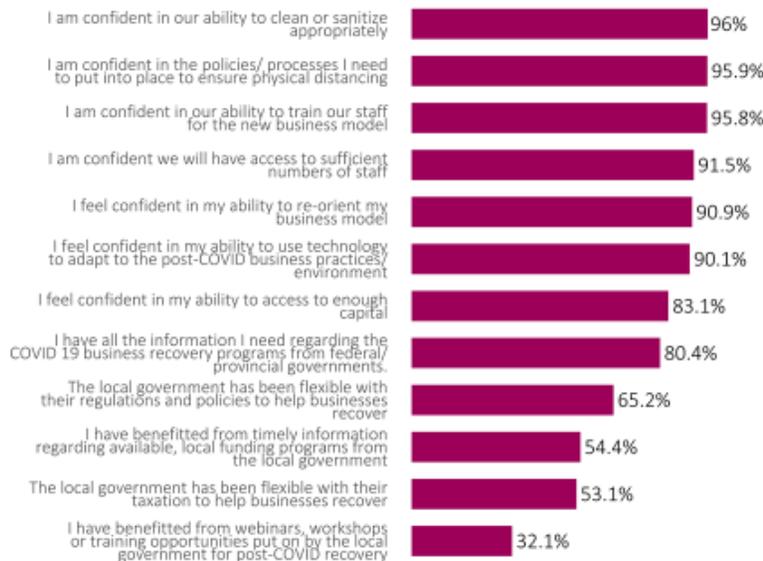
Please rate the level to which you agree or disagree with the following statement...

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Performance of Business Resiliency Factors

Each resilience factor was ranked by businesses on a 4-point scale: Highly disagree, somewhat disagree, somewhat agree, highly agree



The performance represents the proportion of businesses choosing either 'Highly agree' or 'Somewhat agree'



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n=100 respondents



Derived Importance for Resilience: Understanding which local factors have the largest influence on businesses' level of confidence in their ability to adapt to/be resilient to disasters and pandemics.

24 MDB Insight



Priority Matrix



Variable	Level of Importance	Performance	Priority Rank
I have benefitted from webinars, workshops or training opportunities put on by the local government for post-COVID recovery	5.8	32%	1
I have benefitted from timely information regarding available, local funding programs from the local government	7.4	54%	2
The local government has been flexible with their taxation to help businesses recover	6.4	53%	3
The local government has been flexible with their regulations and policies to help businesses recover	7.7	65%	4
I have all the information I need regarding the COVID 19 business recovery programs from federal/provincial governments.	7.7	80%	5
I feel confident in my ability to access to enough capital	6.2	83%	6
I feel confident in my ability to use technology to adapt to the post-COVID business practices/environment	7.0	90%	7
I feel confident in my ability to re-orient my business model	6.5	91%	8
I am confident we will have access to sufficient numbers of staff	6.2	91%	9
I am confident in the policies/ processes I need to put into place to ensure physical distancing	8.3	96%	10
I am confident in our ability to train our staff for the new business model	6.7	96%	11
I am confident in our ability to clean or sanitize appropriately	6.2	96%	12

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n=100 respondents



Future Plans

Within the next 24 months, do you plan on:



	# of businesses	Follow up Questions
Expanding	11	<ul style="list-style-type: none"> • 3 within the next 6 months • 8 business in more than 6 months from now
Downsizing	10	<ul style="list-style-type: none"> • 5 within the next 6 months • 5 businesses in more than 6 months from now
Relocating	3	<ul style="list-style-type: none"> • 1 within the next 6 months • 2 business in more than 6 months from now
Selling	4	<ul style="list-style-type: none"> • All in more than 6 months from now
Closing	3	<ul style="list-style-type: none"> • 1 within the next 6 months • 2 business in more than 6 months from now

27 MDB Insight

n=100 respondents



Triage Results



Throughout the survey process Triage cases that represented green or red flags were tracked. Out of the 100 businesses surveyed, 37 businesses presented an opportunity for intervention.



Green Flag

= Businesses considering expanding = 11 businesses



Red Flag

= Businesses considering relocating, downsizing, selling, closing, upcoming lease expiration or require succession planning assistance = 26 businesses



27 MDB Insight

n=100 respondents



Appendix H: Stakeholder Interview Key Themes

Stakeholder Interview Key Themes

As part of the stakeholder engagement component of this work, MDB Insight engaged with 20 stakeholders from the City of Yellowknife and YKDFN via 30-minute phone interviews. Below is a summary of the key themes that emerged from these consultations.

COVID-19 – A Significant and Ongoing Challenge

Like most of the world, the Yellowknife region has and continues to be significantly challenged by the recent outbreak of COVID-19. There was a strong consensus amongst stakeholders that the pandemic has drastically impacted the economy, with high levels of business uncertainty and job losses resulting from businesses downsizing or closing. Small, family-owned businesses were identified as being at high risk, as are core industries for the Yellowknife region such as mining and tourism. However, due to the geographic remoteness of Yellowknife and strict border control, the window of business closure within Yellowknife was substantially smaller than other regions in Canada.

In addition to the significant economic pressure associated with COVID-19, stakeholders noted that the pandemic has further exposed food security across the region. With already fragile supply lines going into northern communities, many stakeholders felt that COVID-19 has enhanced disruptions. Local farmers are also struggling due to the lack of migrant workers able to access the region.

Furthermore, all stakeholders commented on how COVID-19 seems to have either increased or made more apparent the numerous social issues (e.g. drug/alcohol addiction and homelessness) present in the region. With many residents unable to leave their homes and many losing their jobs, these issues have become harder to ignore. Many interviewees also highlighted the perception of downtown Yellowknife as an 'unsafe' place. However, on a positive note, many people felt that COVID-19 has brought residents closer together and enhanced the level of community spirit with many neighbours helping each other during this time of uncertainty.

Mining – The Importance and Fragility of the Mining Sector

When speaking to stakeholders about key strengths and challenges facing the region, the mining sector was repeatedly mentioned. There was broad agreement that if someone does not work for the government, they most likely work for a mining company or a company that relies on the sector. Many stakeholders felt that mining has been the core or 'saving grace' for regional economic growth and employment history but that this growth has been steadily decreasing in recent years.

COVID-19 has further highlighted the fragility of this sector with stakeholders concerned about the potential for mine closures leading to massive worker layoffs. For example, the pandemic has pushed Dominion Diamond, one of the region's largest employers, to the brink of a financial crash. Interviewees were concerned that if Dominion or another major mine closes, the resulting layoffs will lead to numerous residents leaving the region to search for other employment prospects. Furthermore, a downturn will place additional financial pressure on the economic arm of YKDFN, the Det'on Cho Management LP, which is a key player in the northern mining sector.

On a more positive note, many interviewees felt there was still potential left in the mining sector. Increasing exploration of other minerals (e.g. gold and platinum) could lead to growth in the region. Additionally, stakeholders felt that improvements in environmental regulations over the past several



years have been positive and could be better leveraged to market the area. Finally, positioning Yellowknife as a strategic hub for other northern-based mining activities by leveraging the airport was an opportunity.

Tourism – An Uncertain Future

In addition to the mining sector, tourism was repeatedly mentioned by stakeholders as being an important economic sector for the Yellowknife region. Pre-COVID, there was broad consensus that the industry was rapidly growing, with visitors drawn to the area primarily for aurora borealis viewing. During this time of growth, there had been an influx of unlicensed operators, particularly accommodation offerings (e.g. Airbnb) that the City and YKDFN were trying to manage better. It was recognized by stakeholders the absolute need for sustainable tourism to be prioritized to ensure residents do not feel overcrowded or swamped by visitors.

Regarding recovering from COVID-19, stakeholders were unsure about prospects. The pandemic has stagnated near all tourism activities, with many local operators closing. Furthermore, interviewees were concerned that visitors would be discouraged from coming to the region if flight prices increase and routes close, combined with the broad unwillingness to travel internationally from key visitor markets (e.g. China) due to health risks.

Overall, stakeholders did identify the potential to better collaborate between the City of Yellowknife and YKDFN on cultural tourism opportunities. However, it was stressed that any tourism collaboration must be done correctly to ensure the local indigenous culture is not appropriated.

Managing Rising Cost of Living

Another ongoing issue that stakeholders raised and is typical for remote northern communities is the high cost of living, which shows no sign of slowing down. Stakeholders mentioned that the high cost of living is often rated as the number one or number two issue voters would like political candidates to change. Respondents raised that those who do not have high paying government jobs typically work two to three jobs to make ends meet.

Despite efforts by the City of Yellowknife and YKDFN to realize operational efficiencies, fees and taxes continue to increase each year at well above the inflation rate. The current COVID-19 pandemic has further highlighted the fragility of the northern economy, with the cost of food rising as supply chains are disrupted. Furthermore, the price of power was a key concern with residents frustrated that they pay the highest electricity costs in the country. Many stakeholders highlighted the need for more infrastructure investments such as roads and the airport to keep the cost of living low.

Fostering Greater Collaboration between YKDFN and the City of Yellowknife

A core component of this economic development strategy is establishing a shared economic vision for YKDFN and the City of Yellowknife. As part of the interview process, stakeholders were asked to share ideas on potential collaboration and partnerships. A critical issue that emerged was resolving the ongoing Akaitcho Land Claim and self-government proceedings, which have been under negotiation since 2000. It was expressed that reconciliation is not an easy one and that building trust between both parties must be a core focus. By finalizing the ongoing land claim proceedings, stakeholders felt YKDFN would have a platform to address better some other issues (e.g. lack of affordable housing) and begin working with the City on economic development initiatives (e.g. a jointly run marina).



Increasing cross-cultural training, greater recognition of YKDFN history, language and culture within the city (e.g. updating the visitor centre, road signage and public areas) and during important events (e.g. celebrating local indigenous artists) and representation within political bodies (e.g. Council) should be focused on. Overall, stakeholders seemed positive that this economic development strategy was a sign of the YKDFN and City relationship improving and was excited about the chance to realize the full economic and cultural potential of the region.

Increase Workforce and Training Opportunities

The final theme that emerged from the stakeholder sessions was the need for more workforce training and development opportunities, particularly for youth in the YKDFN. YKDFN respondents felt that Yellowknife is economically well-positioned because it has a large, young worker population but is not realized as there are poor high school graduation rates. Of those that do graduate, many lack strong English and mathematics skills, which prevent them from gaining meaningful employment.

Stakeholders from the City of Yellowknife also shared their desire to hire more YKDFN employees, particularly in the construction sector, but that a lack of basic education qualifications were barriers. The continuation and expansion of successful programs such as the Dechita Naowo training program were mentioned as being of importance. This program provides YKDFN members training in job readiness/employment placements, environmental monitoring/land stewardship, personal growth and leadership. While more training and support resources are required for these communities, it is important to note they must be correctly positioned and operated to ensure long term engagement.

Notable Opportunities

Select stakeholder interviews identified the following economic opportunities to the region that should be taken into account in the creation of this strategy:

- Airport development, making Yellowknife a hub for far north travel
- Commercial fisheries and opportunities for an export market
- The film industry, leveraging local businesses to support visiting film production activity
- Commercial agriculture and the need to support commercial farmers with soil procurement for raised beds and access to land



Appendix I: Targeted Workshop Key Themes

During the week of July 6, 2020, members from MDB Insight (Kai Liepins, Natasha Gaudio Harrison and Paul Blais), Dillon Consulting (Dustin Martin), the City of Yellowknife (Janine Farmer) and YKDFN (Johanne Black and Lena Black) completed four virtual industry and community workshops. Each session lasted two hours and a detailed write-up of key themes gleaned from the sessions.

The relationship between the City of Yellowknife and YKDFN has improved in recent years

An overarching theme from the consultation sessions was how relations between the City of Yellowknife and the YKDFN have improved over time. The participants felt that the UN Declaration on the Rights of Indigenous Peoples (UNDRIP) in September 2007 was a good step toward developing more positive relations. This joint economic development strategy is seen by many as to help more formalize this relationship so both communities can better prosper together and that it highlights the co-dependence the communities have on economic development activities. The overall success of the region depends on long term partnerships with high levels of open communication and faith in the other party to honour their word. It was underlined that this process is not an easy one and the more face to face interactions between City and YKDFN staff, the easier it will become to develop this relationship.

Vision for the future

When asked about what economic development means to them and their vision for the future, stakeholders stressed that it means providing meaningful employment for everyone with equal access to education and training. Greater co-ownership and partnership in economic development opportunities were seen as critical, as was helping to diversify the economy away from the cyclical non-renewables sector into areas such as tourism and agriculture. YKDFN participants also felt that they wanted to gain self-determination and have more impact on deciding the future of their communities in the region at large.

Overcoming the challenge of COVID-19

- The implications from the current COVID-19 pandemic was another common theme throughout the discussions. Stakeholders recounted how challenging the past few months have been from an economic lens – the closure of businesses and a significant reduction in the tourism and mining sectors – and from a social lens regarding the challenges faced with forced isolation. Social issues such as alcoholism and domestic violence were noted to have increased in some households. However, the respondents felt that overall, the community banded together strongly with neighbours looking out for each other. The local business community was also commended on being resilient in the face of this pandemic and that the region was fortunate only to have had limited business closure when compared to other parts of Canada.
- Looking forward, the economic impacts of the pandemic were extremely worrying for respondents. The closure of the borders is severely limiting the tourism industry with no sign of improving in the short term. Similarly, the reductions in the mining sector have broad ripple effects across the economy as mines lay-off staff or close operations. Stakeholders are hopeful that the economy will begin to recover but acknowledge that this will likely take several years.



Tourism will be an essential sector moving forward but needs to be managed correctly

Tourism was seen by stakeholders to be a bright light for further economic diversification over the long term. Members recounted how visitor numbers have spiked in recent years and the positive implications this has had on the local economy, with numerous new businesses and hotels opening up. However, sustainable tourism was stressed as being critical to the survival of the industry. For example, stricter regulations on authentic arts and crafts from the local region to prevent knock-off products being sold in local markets was deemed important. Additionally, creating an indigenous tourism operator training program or certification would help ensure that YKDFN history is retold accurately and by a facilitator with the appropriate local knowledge. This training could be passed to front line tourism staff (e.g. taxi drivers) who are the face of the tourism industry for new visitors and operators should be required to renew their certificate or be tested on their knowledge each year to retain their licence.

YKDFN stakeholders also felt that the local airport misrepresented YKDFN culture as it portrayed images wildlife not native to the region (e.g. polar bears). Edmonton airport was highlighted as a good example of what could be done to update the airport to ensure the authentic local culture is presented to incoming passengers. Similarly, the creation of a new visitor information centre that is shared by YKDFN and City staff in the downtown core would be a valuable asset. This space could help share YKDFN history as well as key accomplishments from the City. Incorporating indigenous language throughout the city, or even partnerships with the local college to create a language training course could attract visitors to the region.

As the economy recovers from COVID-19 and the borders begin to open, stakeholders wanted to see a big marketing push highlighting the benefits of a 'staycation' for domestic travellers. Canadians must know that we are open to businesses and that they will be welcome here, as they will be an important visitor market while the international market slowly returns. It is important that Yellowknife, Ndilo and Dettah position themselves differently from other Canadian destinations, highlighting the cultural aspects and beautiful environment in the region.

Renewed interest in growing food, agriculture as an opportunity for both food security and a business opportunity.

Another economic diversification area of interest was growing the agriculture, fishing and hunting sector. Both YKDFN and the City spoke about how dependent the region is on imports from the south, and how this has raised the cost of living. COVID-19 was seen to have highlighted how fragile global food supply chains can be, and so these stakeholders would like to see more food produced locally. The local farmers' market was regarded as a huge success with opportunities for future expansion and greater incorporation of YKDFN produce and products. Similarly, when the current land claim proceedings are finalized, an idea put forward was the development of a fishery on the Great Salve Lake. There was an identified need to build local knowledge and capacity on agricultural practices and initiatives as a jointly owned greenhouse would be a positive step forward.

Regarding business development, YKDFN stakeholders wanted to see more businesses within Ndilo and Dettah. Specifically, establishing a café or food truck at the end of the ice road would bring locals and visitors during the winter months and may help YKDFN youth gain employment. A review of local regulations to ensure that they are streamlined and uncomplicated would help locals start-up businesses.



The mineral sector is important but should not be fully relied upon

Overall, the mineral sector was still a critical source of jobs and economic development for the region, but it was felt that the 'best' days of the sector are now gone. When planning for the future, it is important that both the City and YKDFN be realistic about the likelihood of future growth and the potential economic implications if there are more mine closures. Diversification into other sectors such as tourism and agriculture is needed to ensure regional self-sufficiency. One mining company is investigating establishing a tourism experience where visitors can explore a new mine shaft and learn about the mining sector. Greater investigation into this product offering and others like it should be conducted as it serves to leverage an already established sector strength into a new economic opportunity.

Land Development Initiatives (e.g. affordable housing)

The current Akaitcho Process regarding YKDFN land claims is expected to soon finalize, with stakeholders excited about the economic development prospects this could bring. Specifically, the development of more affordable housing is highly needed and could occur on YKDFN lands once the claim is processed. Additionally, land could be allocated for docks and boat access as part of the potential joint marina economic development project by both parties. YKDFN stakeholders also discussed Jolliffe Island and how it may eventually be handed back to YKDFN and the potential for development in the long term.

Greater training and development for the local workforce

As highlighted above, for YKDFN youth, there are very limited job opportunities and education pathways that will support them in reaching meaningful employment. YKDFN and local industry outlined a desire to collaborate with the local college and government to establish more streamlined training courses to help YKDFN youths finish high school and enter into some sort of post-secondary training. Skilled trades courses that service the local mining sector or construction industry was highlighted by industry as in need of more local talent. Ongoing support and training for YKDFN members entering the workforce is needed to help them adapt to their new role and ensure they feel comfortable in the organization.

