

A close-up, monochromatic photograph of a hand holding several small, rectangular, textured blocks, possibly stone or wood. The hand is positioned in the lower half of the frame, with fingers curled around the blocks. The blocks are stacked in a way that shows their rough, weathered surfaces. The background is heavily blurred, showing indistinct shapes and textures, suggesting an outdoor or industrial setting. The overall tone is muted and desaturated, with a focus on texture and form.

TRAVEL
NUNAVUT

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EXECUTIVE SUMMARY

Introduction

The travel industry in Nunavut is currently a critical and major component of the economic landscape, presenting significant opportunities for growth and development.

Prior to the COVID-19 pandemic, the travel industry in Nunavut was estimated to have an economic impact of approximately \$400 million in 2019 and employed around 3,000 individuals. With a strategic vision set forth by Travel Nunavut, there is an ambitious goal to expand the travel industry into a billion-dollar industry by 2030, aiming to achieve and maintain 5000 jobs. This growth in the travel industry is not only seen as a pathway to economic diversification but also as a means to support every sector of the economy and enhance the visibility and sustainability of Inuit culture and heritage.

As the travel industry rebounded post-pandemic, there were both challenges and opportunities. Key hurdles include limited infrastructure, high costs of inputs such as fuel and food, and the need for increased support for Inuit-owned businesses. However, the growing demand for a wide range of travel services and authentic Inuit experiences presents a unique opportunity for local businesses to flourish. With a wholistic view of the travel services needed by Nunavummiut and visitors and a focus on sustainable practices and community engagement, Nunavut's travel industry can play a pivotal role in providing more employment and income in every community while promoting and preserving the cultural identity of its inhabitants. Every community in Nunavut needs more services for travelers such as accommodation, food and beverage outlets, infrastructure improvements, local transportation, guide and interpretative services, attractions, activities, etc.

This study aims to assess the travel industry in Nunavut, analyze its economic impacts, and provide insights into future growth potential within this unique Arctic environment.

Travel Nunavut contracted Praxis Consulting, a Canadian firm with extensive experience in economic analysis, to assess the economic impact of the travel industry on the territorial economy in 2024. An input-output model specific to Nunavut was developed and used to estimate the territorial impacts associated with the industry. Measured impacts included the revenue and expenses of travel services businesses, spending of out-of-territory travelers to the region, and the associated spin-off impacts. These impacts were stated in terms of gross output, gross domestic product (GDP), employment and labour income. All results are considered incremental to a hypothetical base case. The hypothetical base case is a scenario in which there was no travel industry in Nunavut.

Main Assumptions

For the purpose of this study, the travel industry in Nunavut is defined as travel in all forms (air, water including searift, ground passenger, short-haul trucking services), accommodation & food services (hotels, resorts, motels, bed and breakfast accommodation, cottages and cabins, campgrounds, hunting and fishing camps and establishments primarily engaged in preparing meals, snacks and beverages, to customer orders, for immediate consumption on and off the premises), traveler spending not elsewhere classified (retail and traveler services such as guided tours, souvenir shops, and various retail stores), and Inuit art (independent individuals (freelance) primarily engaged in performing in artistic productions

(not including out of territory film productions), creating artistic and cultural works or productions) as a driver of traveler traffic.

The travel industry in Nunavut encompasses a diverse range of activities and services, significantly impacting the territory's economy. It includes business travel, which constitutes about 57% of all visits, primarily driven by contractors, suppliers, and government employees involved in various projects, including mining operations. Due to the limited road infrastructure, travel is almost entirely provided by air travel services. Leisure travel is also growing, with initiatives aimed at promoting cultural experiences and outdoor adventure, such as wildlife viewing and traditional Inuit activities.

The government plays a crucial role in facilitating travel through policies and funding that support travel industry development and infrastructure improvements. For example, the 2024-2025 budget includes operational funding for new marine ports at Pond Inlet and Iqaluit, along with additional funding for airport maintenance and improvement. Additionally, medical travel is essential for residents needing healthcare services unavailable in their communities; the government provides transportation to approved medical centres, ensuring access to necessary care.

Air and sea freight are critical for transporting goods to Nunavut's remote locations. Most supplies are delivered by air year-round or by sea during the summer when ice conditions permit. This logistical aspect is essential for supporting both the local economy and the travel industry, as it ensures that businesses can operate effectively and meet the needs of visitors and residents alike. In addition, cruise travel has become a vital segment of Nunavut's travel industry, particularly during the short summer months when expedition ships visit local communities. By facilitating visitors from around the world through cruises, it also creates broader international awareness of Canada's north – the people and the fragile environment and the importance of travel industry, communities and services for environmental management, security and sovereignty.

Statistics Canada's latest territorial input-output tables are from the year 2021, a COVID year, and will not necessarily reflect the current reality of the travel industry in Nunavut. Praxis updated the 2021 tables using 10-year average growth rates to adjust industry gross output to 2024 levels. Exceptions were the transportation and the accommodation & food services which were derived or adjusted based on interviews with key players in these sectors of the travel industry.

Summary of Results

The results include direct, indirect, and induced impacts of travel industry operating revenues, accommodation & food company operating revenues, traveler spending not captured elsewhere (not elsewhere classified or "NEC" (primarily travel retail spending net of Inuit Art), and Inuit art for Nunavut. Results are annual and are expressed in current 2024 dollars. Anticipated future expenditures, not included in the above, consist of future hotel capital expenditures, future military capital expenditures in the form of a proposed Canadian Forces Base (CFB) in the territory of Nunavut, and resulting incremental military travel.

Definitions for the terms listed above and used throughout this report may be found in Appendix A.

Overall, the impacts of the travel industry in Nunavut are as follows:

- \$823.5 Million in total gross output;
- \$461.3 Million in gross domestic product;
- \$333.9 Million in labour income;
- \$82.2 Million in federal tax revenue;
- \$49.9 Million in territorial tax revenue; and,
- 6,322 (5,408 direct) jobs in Nunavut relying directly or indirectly on the travel industry.

Table 1: Territorial Impacts – Travel Industry

Territorial Impacts: Direct, Indirect, and Induced	Gross Output (\$M)	Gross Domestic Product (\$M)	Employment (Positions)	Labour Income (\$M)
Total Transportation	258.4	113.1	1,424	103.6
Total Accommodation and Food Services	260.9	158.4	1,627	115.2
Traveler Not Classified Elsewhere	259.1	171.4	2,561	98.7
Inuit Art	45.1	18.5	711	16.4
Total	823.5	461.3	6,322	333.9

Table 2: Territorial Impacts – Capital Expenditures and New Military Travel

Territorial Impacts: Direct, Indirect, and Induced	Gross Output (\$M)	Gross Domestic Product (\$M)	Employment (Positions)	Labour Income (\$M)
Hotel and Port Capital Expenditures	390.6	138.5	597.0	62.9
Military Base Capital Expenditures	1,003.0	355.0	1,535	160.8
New Military Travel	23.4	10.3	129	9.4

Table 3: Government Revenue Impacts – Travel Industry

Government Revenues (\$M)	Federal (Nunavut Portion)	Territorial
Total Transportation	34.0	30.6
Total Accommodation and Food Services	22.5	9.9
Traveler Not Classified Elsewhere	25.2	7.8
Inuit Art	3.5	1.0
Total	85.2	49.4

Table 4: Government Revenue Impacts – Capital Expenditures and New Military Travel

Government Revenues (\$M)	Federal (Nunavut Portion)	Territorial
Hotel and Port Capital Expenditures	20.3	8.7
Military Base Capital Expenditures	52.0	22.2
New Military Travel	3.1	2.8

Key Takeaways

The economic impact of the travel industry in Nunavut in 2024 is significant, with total gross output reaching \$823.5 million, contributing \$461.3 million to the Gross Domestic Product (GDP), and generating 6,322 jobs with a labour income of \$333.9 million. The accommodation & food services sector alone accounted for \$260.9 million in gross output and \$158.4 million in GDP, employing 1,627 people. Notably, potential future military base capital expenditures had a substantial impact, contributing \$1 billion in gross output and \$355 million to GDP while creating 1,535 jobs. Government revenues from various sectors totaled \$85.2 million federally and \$49.4 million territorially, indicating a robust financial contribution from tourism and related activities. The Inuit art sector, although smaller, still made a notable contribution of \$45.1 million in gross output and \$18.5 million to GDP.

Impact of the Travel Industry in Nunavut

\$823.5 Million in Gross Output

\$461.3 Million in GDP

6,322 Jobs Supported

INTRODUCTION

Travel Nunavut has been an advocate for the territory's travel industry since 1996. Travel Nunavut is a non-profit industry association representing over 150 members that operate in the territory including tour operators, airlines, accommodation providers, food & beverage suppliers, cruise operators, and cultural organizations. The mandate of the organization is to support, build, and grow the travel sector to the benefit of Nunavummiut through training, marketing, research, networking and advocacy. The organization is governed by an 18-member volunteer board, representing the many sectors of the Nunavut travel economy. The organization's office is in Iqaluit, the capital and largest city of Nunavut.

Nunavut is a vast and unspoiled paradise, home to the Inuit. Formed as a territory in 1999, Nunavut has three regions: Kivalliq, Qikiqtaaluk, and Kitikmeot. With approximately two million square kilometres and 40,700 people, Nunavut is the least densely populated of all the provinces and territories in Canada. Nunavut's remote communities are accessible primarily by air and sea. The capital city, Iqaluit, is the largest in the territory with approximately 8,300 people. The economy of Nunavut is driven by mining, government services, and the travel industry though cultural activities such as hunting, fishing and art. Encompassing the eastern end of the Northwest Passage, a shipping route connecting the Atlantic and Pacific Oceans, Nunavut's communities are directly impacted by the maritime traffic and economic activity. The territory plays a crucial role in maintaining control and monitoring the environmental impacts of this passage.

The Nunavut Travel Industry

For the purpose of this study, the travel industry in Nunavut is defined as travel in all forms (air, water, shipping and ground passenger services, etc.) accommodation & food services (hotels, resorts, bed and breakfast accommodations cottages and cabins, and campgrounds, hunting and fishing camps and establishments primarily engaged in preparing meals, snacks and beverages, to customer orders, for immediate consumption on and off the premises), traveler spending not elsewhere classified (traveler retail and tourist services such as guided tours and Inuit art (independent individuals (freelance) primarily engaged in performing in artistic productions, creating artistic and cultural works or productions) as a driver as tourist traffic.

Traveling to and within Nunavut presents several unique challenges due to its geographic remoteness, limited infrastructure, and harsh climate conditions. There are no roads to Nunavut and few direct flights into Nunavut from major Canadian cities. Within Nunavut, there are few local roads and no regional roads connecting the various communities. Most travelers must take multiple flights to reach their destination. For instance, to arrive in some of the more remote communities, it would take a traveler from outside Nunavut up to four flights over the course of a few days, significantly increasing travel complexity and cost.

Nunavut has only two paved runways amongst its 25 airports, restricting the size and types of aircraft that are able to service the communities for passengers and freight. Travelers must rely on air or ship transport for inter-community passenger and freight travel. Some air travel routes are infrequent and may only operate once a week.

As a result, the cost of air travel and freight is significantly higher in Nunavut compared to other regions of Canada. Roundtrip fares often range from \$1,000 to over \$5,000 depending on the route, making it financially challenging for many travellers while the cost of food and amenities is exceptionally high.

Furthermore, the unpredictable weather in Nunavut complicates travel plans. Many airports are not equipped to handle adverse weather conditions due to the lack of longer, paved runways or other landing aids, leading to frequent flight cancellations and delays. Limited accommodations make it challenging to accommodate delayed travellers and food shipment operations can incur high wastage when food shipments spoil. As well, seasonal changes affect traditional ground and water/ice travel routes used by the local population, adding risk and expense to their travel.

Table 5: Detailed Direct Employment – Nunavut Travel Industry Excluding Inuit Art and Traveler Retail¹

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Air transportation	400	550	510	470	480	535	410	440	550	610
Water transportation	10	10	15	10	5	5	5	5	5	5
Truck transportation	50	55	70	85	130	135	145	215	205	200
Ground passenger and scenic and sightseeing transportation	30	35	35	35	40	35	60	75	85	85
Taxi and limousine service	30	35	35	35	40	35	35	40	40	40
Ground passenger transportation and scenic and sightseeing transportation	0	0	0	0	0	0	25	35	45	45
Support activities for transportation	160	140	140	165	195	220	185	220	235	235
Traveler accommodation	340	365	435	405	455	505	375	540	675	660
Recreational camps, and rooming and boarding houses	25	65	75	80	140	210	370	400	405	410
Food services and drinking places	145	155	215	200	195	210	115	175	230	225
Travel arrangement and reservation	20	25	10	20	15	20	15	20	20	20
Total Excluding Inuit Art and Traveler Retail	1,210	1,435	1,540	1,505	1,695	1,910	1,740	2,165	2,495	2,535

Source: Statistics Canada Table: 36-10-0480-01, Praxis

Employment in Nunavut's travel industry² has shown a general upward trend from 2014 to 2023, with total employment increasing from 1,210 positions in 2014 to 2,535 in 2023. The air transportation sector remains the largest employer, rising from 400 to 610 jobs over the same period. Notably, the recreational camps sector saw significant growth, expanding from 25 jobs in 2014 to 410 by 2023. Other

¹ Labour statistics are produced by integrating different data sources in order to generate estimates consistent with the Canadian System of National Accounts. (Statistics Canada, <https://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=1570503>)

² As there is no direct category for Inuit art nor traveler retail, these sectors have been excluded from Table 5.

sectors such as traveler accommodation & food services also experienced significant increases, with accommodation jobs climbing from 340 to 660. Despite fluctuations in certain areas, such as small-scale local truck transportation and water transportation maintaining low employment levels, the overall trajectory indicates a robust recovery and growth in the travel industry workforce in Nunavut.

Travel as an Economic Driver in the Arctic

The travel industry is increasingly recognized as significant economic drivers in Canada's north. The travel industry provides jobs and income for local communities, contributing to economic stability in regions that often face harsh environmental conditions and limited economic opportunities.

The travel industry helps diversify local economies, reducing dependence on traditional industries like mining and fishing. This diversification can lead to more sustainable economic growth and resilience against market fluctuations.

The increase in leisure travel also raises concerns about environmental sustainability and cultural impacts. Ensuring that travel is managed sustainably is crucial to maintaining the long-term viability of this economic driver. Travel can promote cultural exchange and preservation by supporting local communities and their traditions. In Nunavut, cultural travel experiences are developed by Inuit.

METHODOLOGY AND ASSUMPTIONS

This analysis presents results based on standard methodologies for estimating economic contributions for sub-national geographies.

To estimate the impact of the Nunavut travel industry, Praxis' territorial economic model was employed which uses the latest provincial/territorial and national input-output tables. An input-output analysis is a form of macroeconomic evaluation based on the interdependencies between different economic sectors or industries. This method is commonly used for estimating the impacts of positive or negative economic shocks and analyzing the ripple effects throughout an economy. The Nunavut model contains 35 industries and 66 commodities. These models are based on a standardized method published by Statistics Canada and yields consistent and repeatable results. Model description and definitions are available in Appendix A.

In addition to the territorial core model, Praxis has developed several satellite modules. One relevant module to this analysis is the fiscal module. This module provides a more thorough representation of the impact of a project on government revenues. Typical economic impact models will only provide results in terms of indirect taxes. Praxis' economic impact model extends this to include personal income taxes, corporate and unincorporated business taxes, as well as resource revenues, and excise taxes. The fiscal module is updated annually upon the release of the federal, provincial and territorial government budgets.

Statistics Canada's latest territorial input-output tables are from the year 2021, a COVID year, and will not necessarily reflect the current reality of the travel industry in Nunavut. Praxis updated the 2021

tables to 2024 using several methods. Ten-year average growth rates were used to adjust industry gross output to 2024 levels. Exceptions were the transportation and the accommodation & food service industries which were derived from interviews with key players in the sector. Interviewees were asked what percentage their sales increased from 2021. The appropriate percent increase was applied to the transport and accommodation & food services industries. Technical coefficients in 2021 were used to estimate 2024 inter-industry purchases.

Praxis completed 19 interviews with industry representatives operating within the territory. Interviewees were asked a similar set of questions, varying slightly by industry, regarding percentage changes since 2021 in revenue, employment, wages and capital expenditures. Initial contact was by email, with a follow-up by phone if necessary. The interviews varied in length from 20 to 40 minutes and took place by video conference between January 21 and March 13, 2025. Industries contacted included airlines, cruise lines, hotels, outfitters, construction, transportation, accommodation & food services, as well as government departments in parks, healthcare, economic development, tourism and sport.

Secondary information was gathered through desktop research. This included company websites, research reports, government agency websites, news articles, press releases, and other background information.

As a quality control measure, derived multipliers from the 2021 and 2024 economic models were compared. No significant differences were noted. These are summarized below including 2021 and 2024 industry outputs and applied growth rates. For additional comparison, growth rates for both 2019 (representing the pre-pandemic economy) and 2020 (representing a pandemic year) to 2024 are included below.

Table 6: Derived Multipliers and Industry Output 2021 and 2024; Growth Rate

Derived Multipliers (Type II) [#]	2024	2021	2024 Gross Output (\$M)	2021 Gross Output (\$M)	Growth Rate	Growth Rate Source	2019 to 2024 Growth Rate	2020 to 2024 Growth Rate
Fishing, Hunting and Trapping	1.158	1.149	183.6	52.7	248.3%	10-Yr Avg	156.0%	373.2%
Mining and Oil and Gas Extraction	1.444	1.378	5,269.1	3,081.6	71.0%	10-Yr Avg	164.4%	85.5%
Utilities	1.511	1.483	129.7	117	10.9%	10-Yr Avg	18.7%	15.5%
Construction	1.458	1.364	1,369.6	1,005.4	36.2%	10-Yr Avg	-6.2%	55.4%
Manufacturing	1.451	1.395	82.2	48.5	69.5%	10-Yr Avg	96.6%	153.7%
Wholesale Trade	1.496	1.517	93.0	61.7	50.8%	10-Yr Avg	73.3%	94.6%
Retail Trade	1.627	1.651	209.5	190	10.3%	10-Yr Avg	24.9%	15.9%
Transportation*	1.628	1.649	203.2	166.7	21.9%	Survey	29.3%	28.3%
Storage and Warehousing*	1.526	1.649	2.6	166.7	21.9%	10-Yr Avg	0.0%	175.4%
Information and Cultural Industries	1.199	1.197	107.7	90.7	18.7%	10-Yr Avg	0.0%	15.2%
Finance, Insurance, Real Estate and Rental and Leasing	1.261	1.276	367.9	357.2	3.0%	10-Yr Avg	2.8%	44.2%
Professional, Scientific and Technical Services	1.561	1.570	65.9	61.3	7.4%	10-Yr Avg	17.2%	1.2%
Administrative and Support, Waste Management and Remediation Services	1.725	1.748	95.1	80.9	17.6%	10-Yr Avg	25.3%	-0.8%
Educational Services	1.838	1.841	2.1	2	4.5%	10-Yr Avg	-0.5%	16.7%
Health Care and Social Assistance	1.580	1.578	72.6	86.2	-15.8%	10-Yr Avg	-9.7%	-7.2%
Arts, Entertainment and Recreation	2.340	2.341	1.8	1.6	10.0%	10-Yr Avg	-37.2%	20.0%
Accommodation and Food Services	1.812	1.823	188.5	85.4	120.8%	Survey	119.2%	125.2%
Other Services (Except Public Administration)	1.764	1.766	17.7	14.8	19.3%	10-Yr Avg	32.7%	17.2%
Non-Profit Institutions Serving Households	1.935	1.946	158.4	133.6	18.5%	10-Yr Avg	44.4%	30.0%
Government Sector	1.772	1.777	3,118.0	2,630.6	18.5%	10-Yr Avg	33.2%	27.8%

Source: Praxis

[#]Type II includes direct, indirect and induced multipliers

*Transportation, Storage and Warehousing were split in the 2024 table

Direct impacts of Inuit Art were drawn from “Impact of the Inuit Arts Economy” prepared for Indigenous and Northern Affairs Canada by Big River Analytics³ and inflated to 2024 levels.

Traveler spending NEC (not elsewhere classified) was drawn from visitor survey results in the 2022-2023 Travel Nunavut annual report. 50,000 visitors were assumed. The travel portion was assumed to be captured in transportation industry results. The remaining spending was retail, souvenirs, and tourism services and totaled \$161.4 million in retail and \$38.1 million in business support services.

³ Government of Canada; Crown-Indigenous Relations and Northern Affairs Canada. (2024, March 8). *Impact of the Inuit arts economy*. <https://www.rcaanc-cirnac.gc.ca/eng/1499360279403/1534786167549>

Hotel capital expenditures was based on interview results and totaled \$22.5 million in renovations. Ports capital expenditures was based on interviews and totaled \$275 million to convert two ports to deepwater status.

Military capital expenditures was based on a proposed 4,000 person Canadian Forces Base (CFB) Iqaluit. The average construction costs for Fort Wainwright in Alaska and Olavsværn in Norway inflated to 2024 dollars and converted to Canadian currency. This totaled \$766 million.

New military travel was estimated as Nunavut defense gross output per employee multiplied by 4,000 or \$1,203.7 million. The transportation component of this is \$74.4 million. After adjusting for imports, new military travel is estimated at \$18.4 million per annum.

Current military spending in Nunavut is estimated at \$7.5 million with employment at 25 positions.⁴

LIMITATIONS

Praxis experienced the following limitations when conducting the analysis of this report:

- Statistics Canada's latest territorial input-output tables are from 2021. Praxis employed a variety of methods to estimate 2024 values including ten-year averages, news articles, press releases, and interviews with each sector of the economy.
- Statistics Canada was the primary source of data however there were elements of the travel industry that are not covered by the territorial input-output tables. Praxis employed a variety of methods to estimate these gaps with industry member interviews the primary source of this information. Secondary sources included news articles, press releases, company websites, research reports, government agency websites, and other background information.
- Nineteen interviews were conducted however, Praxis was unable to complete interviews in a couple key sectors due to the timeline of this analysis and scheduling conflicts. Estimated values through secondary research and inflated data from 2021 was used as a proxy for these interviews.
- Each interviewee was provided with a similar set of questions, varying slightly by industry, regarding percentage changes since 2021 in revenue, employment, wages and capital expenditures. Responses varied, with some interviewees providing specific percentages, while others responded generally. Praxis was able to aggregate these responses and combine them with secondary research to develop an estimate for that industry.
- Maintaining confidentiality of source information in the interviews was especially important to those business and sector representatives that were interviewed. It is extremely important to have their cooperation and ensure that any identifiers or small sample statistics and representations are not included in the reporting of the study findings. The privacy and confidentiality of the information collected in these interviews is critical and no one outside of Praxis has access to information collected in the interviews. This information will be destroyed by Praxis in accordance with our code of professional practice.

⁴ Source: Statistics Canada Tables: 36-10-0480-01 and 36-10-0438-01

DETAILED RESULTS

The results below are the direct, indirect, and induced impacts of the Nunavut travel industry in 2024 and future travel and accommodation & food services capital expenditures and incremental military travel. All impacts are compared to a scenario in which there was no travel industry in Nunavut (i.e. a hypothetical base case). Results are expressed in 2024 dollars.

Table Terminology Explained

Gross output measures total expenditures on local goods and services as well as payments to labour and business profits. Gross output is the total value of goods and services produced by an industry. It includes intermediate inputs that are foreign - and domestically - produced goods and services used by an industry in the production of its gross output. Value added is the difference between gross output and intermediate inputs and represents the value of labour and capital used in producing gross output. The sum of value added across all industries is equal to gross domestic product for the economy.

Gross domestic product (GDP) measures net economic activity within a prescribed geographic area. It represents the payments made to final factors of production: labour, unincorporated business profits, and other operating surplus (corporate profits, interest income, inventory valuation adjustments, and capital consumption allowances). GDP excludes the value of intermediate goods and services used in production. Labour income includes wages, salaries, and employer contributions to pensions and benefit packages.

A simple example illustrates how gross output differs from GDP. A baker buys oil, baking powder, and flour which she uses to make bannock. The baker sells the bannock to households and the baker's gross output is the revenue earned from sale. Intermediate inputs are calculated as the cost of oil, baking powder, and flour for the baker and value added is calculated as the difference between revenue earned and the cost of intermediate inputs. Because gross output can include sales to other industries, it can be duplicative in nature. An industry's value added is defined as the total value of an industry's production less the cost of inputs purchased from other industries and eliminates this duplication.

Detailed Results

Economic model results are shown in the tables below.

Table 7: Nunavut Travel Industry Economic Impact by Component – Direct, Indirect, and Induced

	Total Transportation	Total Accommodation and Food Services	Traveler NEC	Inuit Art	Total
Gross Output (\$M)					
Direct	203.2	188.5	199.4	24.2	615.3
Indirect	29.5	43.8	35.2	16.9	125.4
Induced	25.7	28.6	24.5	4.1	82.8
Total Gross Output	258.4	260.9	259.1	45.1	823.5
Gross Domestic Product (\$M)					
Direct	79.6	113.6	133.2	6.1	332.5
Indirect	17.1	26.6	22.6	9.8	76.1
Induced	16.4	18.2	15.6	2.6	52.7
Total Gross Domestic Product	113.1	158.4	171.4	18.5	461.3
Employment (Positions)					
Direct	1,175	1,295	2,320	618	5,408
Indirect	121	189	119	73	501
Induced	128	143	122	20	413
Total Employment	1,424	1,627	2,561	711	6,322
Labour Income (\$M)					
Direct	87.0	92.7	81.3	9.3	270.4
Indirect	8.8	13.9	9.9	5.8	38.4
Induced	7.8	8.7	7.4	1.2	25.1
Total Labour Income	103.6	115.2	98.7	16.4	333.9

Table 8: Capital Expenditures and New Military Travel Economic Impact by Component – Direct, Indirect, and Induced

	Hotel and Port capital expenditures	Military Base capital expenditures	New Military Travel
Gross Output (\$M)			
Direct	297.3	765.1	18.4
Indirect	77.7	198.1	2.7
Induced	15.6	39.9	2.3
Total Gross Output	390.6	1,003.0	23.4
Gross Domestic Product (\$M)			
Direct	83.3	213.9	7.2
Indirect	45.3	115.7	1.6
Induced	10.0	25.4	1.5
Total Gross Domestic Product	138.5	355.0	10.3
Employment (Positions)			
Direct	344	885	107
Indirect	175	450	11
Induced	78	199	12
Total Employment	597	1,535	129
Labour Income (\$M)			
Direct	40.4	103.7	7.9
Indirect	17.8	45.0	0.8
Induced	4.7	12.1	0.7
Total Labour Income	62.9	160.8	9.4

FISCAL IMPACTS

An expansion in economic activity is expected to generate incremental government revenues. The economic impact model's fiscal module is based on the latest territorial and federal budgets and estimates government revenues as follows:

- Territorial personal income tax is calculated by using the territorial personal income tax rate that would apply to average industry annual income. This is applied to model-generated labour income.
- Corporation income tax is calculated by applying the respective territorial corporate tax rate to incremental corporate profits before taxes.
- Unincorporated business income taxes are calculated by applying the small business tax rate to incremental unincorporated business profits.
- Federal and Territorial sales taxes collected are calculated using a ratio of government sales and excise tax revenues to retail industry output.
- Estimated government revenues are for direct, indirect, and induced impacts and represent taxes paid solely by the industry (including territorial services such as sewer and water treatment). Estimates are not adjusted for any changes to equalization entitlements.

Table 9: Government Revenue Impacts –Direct, Indirect, and Induced impacts – Transportation, Accommodation and Food, Traveler Spending NEC, and Inuit Art

Government Revenue Impacts: Direct, Indirect, and Induced	Personal Income Tax (PIT)	Corporate Income Tax	Unincorporated Business Income Taxes	Sales and Excise Taxes	Total Revenue
Federal (\$M)	55.7	7.4	4.7	15.4	83.1
Territorial (\$M)	19.0	5.9	1.2	23.1	49.3
Total	74.7	13.3	5.9	38.5	132.4

Table 10: Government Revenue Impacts –Direct, Indirect, and Induced impacts – Capital Expenditures and New Military Travel

Government Revenue Impacts: Direct, Indirect, and Induced	Personal Income Tax (PIT)	Corporate Income Tax	Unincorporated Business Income Taxes	Sales and Excise Taxes	Total Revenue
Federal (\$M)	53.7	12.3	6.5	3.0	75.4
Territorial (\$M)	17.7	9.8	1.7	4.6	33.7
Total	71.3	22.1	8.2	7.6	109.2

After adjusting for revenue from the Federal Government (\$2.7 billion) and considering only revenue generated by the Government of Nunavut (\$639.9 million), government revenue from the travel industry for the Government of Nunavut (\$49.4 million), this represents 7.7 percent of Territorial revenues.

ACHIEVING A BILLION DOLLAR INDUSTRY

The economic impact of the travel industry in Nunavut is significant in 2024 with \$461.3 million in Gross Domestic Product (GDP) comprised of \$113.1 million in transportation, \$158.4 million in accommodation & food services, \$171.4 million in traveler spending NEC (not elsewhere classified), and \$18.5 million in Inuit art. This is based on the following direct impacts:

Table 11: 2024 Direct Impacts by Sector

Total Transportation	Total Accommodation and Food Services	Traveler NEC	Inuit Art	Total Direct Impacts
203.2	188.5	199.4	24.2	615.3

To see \$1 billion in GDP, direct impacts would have to more than double to \$1.3 billion. Maintaining the same proportions as per table 11, resulting impacts will be as follows:

Table 12: Impacts by Sector – A \$1 Billion Industry

Total Travel	Gross Output (\$M)	Gross Domestic Product (\$M)	Employment (Positions)	Labour Income (\$M)
Direct	1,333.8	749.8	10,201.8	571.9
Indirect	241.4	148.0	930.5	72.4
Induced	173.3	110.5	862.8	52.6
Total	1,748.6	1,008.3	11,995.1	696.9

COMPARISONS WITH THE MINING INDUSTRY

The mining industry is critically important to Nunavut's economy, serving as its largest private-sector contributor and a key driver of economic growth, employment, and community development. Mining accounted for 46.7% of Nunavut's GDP in 2023, making it the single largest contributor to the territory's economy. This share has grown significantly since 2009, when it was just 5% of GDP.

In 2023, mining companies spent \$2.35 billion in Nunavut, with over half directed toward local businesses. Over the past 16 years, mining investments have totaled \$17.5 billion. Mining provides well-paying jobs for many residents, including Inuit workers, and has spurred the growth of Indigenous-owned businesses and contributed to infrastructure development in areas like transportation and construction. New projects, such as the Goose project from B2Gold Corp and Agnico Eagle's exploration at Hope Bay, suggest continued growth in the sector.

Praxis estimates mining gross output direct impact in 2024 to be \$5.24 billion, based on the ten-year average growth applied to the 2021 figure, the latest available. This figure was used as an input to the

Praxis economic model to generate comparable direct, indirect, induced impacts. These are produced in Table 13. From an economic perspective, mining has a larger impact compared to travel in terms of gross output, GDP, employment, and labour income. The travel industry provides a steady sustainable growth profile, less prone to boom-and-bust cycles.

Table 13: Territorial Impacts – Travel and Mining Industries

Territorial Impacts: Direct, Indirect, and Induced	Gross Output (\$M)	Gross Domestic Product (\$M)	Employment (Positions)	Labour Income (\$M)
Total Travel	823.5	461.3	6,322	333.9
Total Mining	6,763.4	3,871.7	9,459	1,224.5

WHAT WE HEARD

For this study, Praxis conducted 19 interviews representing a variety of sectors in the travel industry. In addition to the employment, revenue, and operational and non-operational expense data, Praxis heard much about the issues affecting these firms. While some items are specific to individual sectors, most issues related to broader operations within the territory, in some respect.

For many, revenue and employment have bounced back since the end of the COVID-19 restrictions. However, the increase in operational expenses, such as fuel and wages, has increased at the same rate, if not more. Adding to increases in operating expenses, several firms reported that finding skilled labour is more difficult. This is due in part to competition from the government providing security and wages that cannot be matched by private business and other non-government organizations in the territory.

Another concern raised by interviewees was a lag in infrastructure development. Issues noted in airports that do not have adequate landing surfaces for larger cargo planes, seaports which are not utilized in the refueling of vessels, and sports facilities and hotel availability to accommodate demand generated by construction, events, delayed flights with stranded passengers, etc.

Solutions put forward by interviewees included increasing capacity and training of the current labour force while waiting for infrastructure development, especially the Inuit labour force. It was also noted that many Canadians may not yet be fully aware of the unique experiences and opportunities Nunavut offers. To help bridge this gap, a national awareness campaign could be further developed to showcase the territory's rich culture, breathtaking landscapes, and vibrant communities. With increased visibility, there is great potential for Nunavut to become a northern icon for Canada – much like how Svalbard represents a gateway to the Arctic for Norway. On the other hand, concerns were raised about the potential for negative impacts of increased travel on Inuit communities, their traditional customs, and Nunavut's fragile environment.

KEY FINDINGS

In conclusion, the 2024 travel impacts within Nunavut include:

- \$823.5 Million in total gross output;
- \$461.3 Million in gross domestic product;
- \$333.9 Million in labour income;
- \$82.2 Million in federal tax revenue;
- \$49.9 Million in territorial tax revenue; and,
- 6,322 jobs in Nunavut relying directly or indirectly on the travel industry.

While there is still recovery and support needed for the industry following the negative impacts of COVID-19, Nunavut's travel industry still acts as a significant contributor to the territory's economy.

APPENDIX A: DEFINITIONS AND MODEL DESCRIPTION

Employment: measured in positions.

Final Demand: sum of personal expenditure, government purchases of goods and services, business and government investment, and net exports.

Gross Domestic Product (GDP) at factor cost: measure of net economic activity within a prescribed geographic area. It represents the payments made to final factors of production: labour, unincorporated business profits, and other operating surplus (corporate profits, interest income, inventory valuation adjustments, and capital consumption allowances). GDP at factor cost excludes the value of intermediate goods and services used in production.

Gross Domestic Product (GDP) at market prices: GDP at factor cost plus indirect taxes less subsidies.

Gross Output: total expenditures on local goods and services as well as payments to labour and business profits. Gross output includes double counting because it includes the value of inputs used in production rather than net value added alone.

Direct Impact: total project expenditure, usually construction or operating outlays.

Indirect Impact: the secondary impact that includes inter-industry transactions, purchases of inputs from supporting industries.

Induced Impact: the additional impact from changes in household spending as industries modify labour input requirements in response to altered levels of demand for output.

Industry outputs are calculated as $(I - D(I - \mu - \alpha - \beta)B)^{-1} D((I - \mu - \alpha - \beta)e^* + (I - \mu - \beta)X_d + (I - \mu)X_r) = X$

Where:

I = an identity matrix of industry-by-industry dimension.

D = a matrix of coefficients representing commodity output proportions.

B = a matrix of coefficients representing commodity input proportions (technical coefficients) by industry.

μ = a diagonal matrix whose elements represent the ratio of imports to use.

α = a diagonal matrix whose elements represent the ratio of government production to use.

β = a diagonal matrix whose elements represent the ratio of inventory withdrawals to use.

e^* = final demand categories of consumption, government purchases of goods and services, business and government investment, and inventory additions.

X_d = final demand category of domestic exports.

X_r = final demand category of re-exports.

Employment is calculated as a fixed number of positions per dollar of industry output.

Direct impact is the total initial expenditure. Indirect impact is the secondary impact that includes inter-industry transactions: purchases of inputs from supporting industries. Induced impact is the additional impact from changes in household spending as additional labor is hired.

Gross output measures total expenditures on local goods and services as well as payments to labour and business profits. Gross output is the total value of goods and services produced by an industry and includes intermediate inputs that are foreign- and domestically-produced goods and services used by an industry in the production of its gross output. Value added is the difference between gross output and intermediate inputs and represents the value of labour and capital used in producing gross output. The sum of value added across all industries is equal to gross domestic product for the economy.

Gross domestic product (GDP) measures net economic activity within a prescribed geographic area. It represents the payments made to final factors of production: labour, unincorporated business profits, and other operating surplus (corporate profits, interest income, inventory valuation adjustments, and capital consumption allowances). GDP excludes the value of intermediate goods and services used in production. Labour income includes wages, salaries, and employer contributions to pensions and benefit packages.

Employment impact results are measured in positions and includes a mix of both full and part-time positions. Results are rounded to the nearest whole number, and as such, columns sums may not necessarily add to the table total.

APPENDIX B: IMPACTS BY INDUSTRY

Impacts of travel on the Nunavut economy are pervasive and widespread. Tables 14 through 20 provide the total impact (sum of direct, indirect, and induced) by industry. Direct impacts are confined to the travel, accommodation & food services, retail, business support, and construction sectors. Indirect impacts centre on industries supporting the directly impacted sectors notably, finance, insurance, real estate, rentals and leasing, and business support services. Induced impacts, representing the impact of the spending of new wages, occur primarily within the retail and service sectors.

Table 14: Impacts by Industry – Direct, Indirect, and Induced – Transportation – Nunavut

Industry	Gross Output (\$M)	GDP at Basic Prices (\$M)	Employment (Positions)	Labour Income (\$M)
Fishing, Hunting and Trapping	0.5	0.3	0	0.0
Mining and Oil and Gas Extraction	0.2	0.1	0	0.0
Utilities	2.1	1.1	4	0.6
Construction	0.2	0.1	0	0.0
Manufacturing	1.5	0.7	2	0.3
Wholesale Trade	1.2	1.0	3	0.4
Retail Trade	5.8	3.8	73	2.2
Transportation	214.7	84.1	1,241	91.9
Storage and Warehousing	0.1	0.0	0	0.0
Information and Cultural Industries	3.6	2.7	4	0.3
Finance, Insurance, Real Estate and Rental and Leasing	13.8	10.9	15	1.3
Professional, Scientific and Technical Services	0.9	0.6	5	0.3
Administrative and Support, Waste Management and Remediation Services	1.8	1.3	14	1.0
Educational Services	0.1	0.0	1	0.0
Health Care and Social Assistance	0.5	0.3	3	0.1
Arts, Entertainment and Recreation	0.0	0.0	1	0.0
Accommodation and Food Services	3.7	2.3	26	1.8
Other Services (Except Public Administration)	0.4	0.2	5	0.2
Non-Profit Institutions Serving Households	1.1	0.6	8	0.6
Government Sector	6.1	3.1	18	2.5
Total	258.4	113.1	1,424	103.6

Table 15: Impacts by Industry – Direct, Indirect, and Induced – Accommodation and Food Services – Nunavut

Industry	Gross Output (\$M)	GDP at Basic Prices (\$M)	Employment (Positions)	Labour Income (\$M)
Fishing, Hunting and Trapping	0.5	0.3	0	0.0
Mining and Oil and Gas Extraction	0.1	0.1	0	0.0
Utilities	7.5	3.8	13	2.2
Construction	0.4	0.1	0	0.1
Manufacturing	0.8	0.4	1	0.1
Wholesale Trade	1.1	0.9	2	0.4
Retail Trade	11.0	7.2	138	4.2
Transportation	1.5	0.6	9	0.6
Storage and Warehousing	0.0	0.0	0	0.0
Information and Cultural Industries	3.0	2.3	4	0.2
Finance, Insurance, Real Estate and Rental and Leasing	16.4	13.0	18	1.5
Professional, Scientific and Technical Services	0.7	0.4	4	0.2
Administrative and Support, Waste Management and Remediation Services	2.3	1.7	18	1.2
Educational Services	0.0	0.0	1	0.0
Health Care and Social Assistance	0.7	0.4	4	0.2
Arts, Entertainment and Recreation	0.4	0.1	10	0.1
Accommodation and Food Services	193.1	116.4	1,327	95.0
Other Services (Except Public Administration)	0.3	0.2	4	0.1
Non-Profit Institutions Serving Households	2.8	1.6	20	1.6
Government Sector	18.2	9.1	54	7.4
Total	260.9	158.4	1,627	115.2

Table 16: Impacts by Industry – Direct, Indirect, and Induced – Traveler Spending NEC – Nunavut

Industry	Gross Output (\$M)	GDP at Basic Prices (\$M)	Employment (Positions)	Labour Income (\$M)
Fishing, Hunting and Trapping	0.4	0.2	0	0.0
Mining and Oil and Gas Extraction	0.1	0.0	0	0.0
Utilities	4.3	2.2	7	1.2
Construction	0.4	0.1	0	0.0
Manufacturing	0.4	0.2	1	0.1
Wholesale Trade	0.9	0.7	2	0.3
Retail Trade	167.7	109.8	2,101	63.8
Transportation	2.6	1.0	15	1.1
Storage and Warehousing	0.0	0.0	0	0.0
Information and Cultural Industries	2.5	1.9	3	0.2
Finance, Insurance, Real Estate and Rental and Leasing	18.7	14.8	21	1.8
Professional, Scientific and Technical Services	1.1	0.7	6	0.3
Administrative and Support, Waste Management and Remediation Services	41.7	30.2	327	21.9
Health Care and Social Assistance	0.6	0.3	3	0.2
Arts, Entertainment and Recreation	0.1	0.0	1	0.0
Accommodation and Food Services	2.6	1.6	18	1.3
Other Services (Except Public Administration)	0.1	0.1	1	0.0
Non-Profit Institutions Serving Households	1.9	1.1	14	1.0
Government Sector	13.0	6.5	38	5.3
Total	259.1	171.4	2,561	98.7

Table 17: Impacts by Industry – Direct, Indirect, and Induced – Inuit Art – Nunavut

Industry	Gross Output (\$M)	GDP at Basic Prices (\$M)	Employment (Positions)	Labour Income (\$M)
Fishing, Hunting and Trapping	0.1	0.1	0	0.0
Utilities	1.2	0.6	2	0.3
Construction	0.1	0.0	0	0.0
Manufacturing	0.1	0.0	0	0.0
Wholesale Trade	0.5	0.4	1	0.2
Retail Trade	2.7	1.8	34	1.0
Transportation	0.3	0.1	2	0.1
Storage and Warehousing	0.0	0.0	0	0.0
Information and Cultural Industries	0.3	0.2	0	0.0
Finance, Insurance, Real Estate and Rental and Leasing	3.9	3.1	4	0.4
Professional, Scientific and Technical Services	0.1	0.1	1	0.0
Administrative and Support, Waste Management and Remediation Services	0.3	0.2	2	0.1
Health Care and Social Assistance	0.2	0.1	1	0.1
Arts, Entertainment and Recreation	24.3	6.2	623	9.4
Accommodation and Food Services	0.7	0.4	5	0.4
Other Services (Except Public Administration)	0.2	0.1	2	0.1
Non-Profit Institutions Serving Households	0.8	0.5	6	0.4
Government Sector	9.2	4.6	27	3.7
Total	45.1	18.5	711	16.4

Table 18: Impacts by Industry – Direct, Indirect, and Induced – Hotel and Port Capital Expenditures – Nunavut

Industry	Gross Output (\$M)	GDP at Basic Prices (\$M)	Employment (Positions)	Labour Income (\$M)
Fishing, Hunting and Trapping	3.2	1.7	1	0.1
Mining and Oil and Gas Extraction	39.9	22.7	40	6.5
Utilities	2.4	1.2	4	0.7
Construction	297.7	83.4	345	40.4
Manufacturing	2.6	1.2	3	0.4
Wholesale Trade	5.1	4.1	11	1.9
Retail Trade	5.2	3.4	65	2.0
Transportation	7.1	2.8	38	3.1
Storage and Warehousing	0.1	0.1	0	0.0
Information and Cultural Industries	1.9	1.4	2	0.1
Finance, Insurance, Real Estate and Rental and Leasing	9.5	7.5	11	0.9
Professional, Scientific and Technical Services	2.8	1.7	16	0.9
Administrative and Support, Waste Management and Remediation Services	1.2	0.9	9	0.6
Health Care and Social Assistance	0.4	0.2	2	0.1
Arts, Entertainment and Recreation	0.0	0.0	1	0.0
Accommodation and Food Services	2.2	1.4	15	1.1
Other Services (Except Public Administration)	0.2	0.1	2	0.1
Non-Profit Institutions Serving Households	1.2	0.7	9	0.7
Government Sector	7.9	3.9	23	3.2
Total	390.6	138.5	597	62.9

Table 19: Impacts by Industry – Direct, Indirect, and Induced – Military Capital Expenditures – Nunavut

Industry	Gross Output (\$M)	GDP at Basic Prices (\$M)	Employment (Positions)	Labour Income (\$M)
Fishing, Hunting and Trapping	8.2	4.4	2	0.3
Mining and Oil and Gas Extraction	102.4	58.5	102	16.7
Utilities	6.2	3.1	11	1.8
Construction	766.2	214.2	887	103.9
Manufacturing	6.6	3.1	8	1.1
Wholesale Trade	13.2	10.7	29	4.9
Retail Trade	13.3	8.7	166	5.0
Transportation	16.7	6.5	96	7.1
Storage and Warehousing	0.2	0.1	1	0.1
Information and Cultural Industries	4.9	3.7	6	0.3
Finance, Insurance, Real Estate and Rental and Leasing	24.3	19.2	27	2.3
Professional, Scientific and Technical Services	7.1	4.5	40	2.3
Administrative and Support, Waste Management and Remediation Services	3.0	2.2	24	1.6
Educational Services	0.1	0.0	1	0.0
Health Care and Social Assistance	0.9	0.5	5	0.3
Arts, Entertainment and Recreation	0.1	0.0	2	0.0
Accommodation and Food Services	5.7	3.4	39	2.8
Other Services (Except Public Administration)	0.4	0.2	5	0.2
Non-Profit Institutions Serving Households	3.2	1.8	23	1.8
Government Sector	20.3	10.1	60	8.2
Total	1,003.0	355.0	1,535	160.8

Table 20: Impacts by Industry – Direct, Indirect, and Induced – New Military Travel – Nunavut

Industry	Gross Output (\$M)	GDP at Basic Prices (\$M)	Employment (Positions)	Labour Income (\$M)
Utilities	0.2	0.1	0	0.1
Construction	0.0	0.0	0	0.0
Manufacturing	0.1	0.1	0	0.0
Wholesale Trade	0.1	0.1	0	0.0
Retail Trade	0.5	0.3	7	0.2
Transportation	19.5	7.6	113	8.3
Storage and Warehousing	0.0	0.0	0	0.0
Information and Cultural Industries	0.3	0.2	0	0.0
Finance, Insurance, Real Estate and Rental and Leasing	1.3	1.0	1	0.1
Professional, Scientific and Technical Services	0.1	0.1	0	0.0
Administrative and Support, Waste Management and Remediation Services	0.2	0.1	1	0.1
Accommodation and Food Services	0.3	0.2	2	0.2
Non-Profit Institutions Serving Households	0.1	0.1	1	0.1
Government Sector	0.6	0.3	2	0.2
Total	23.4	10.3	129	9.4