

1994 NWT Exit Survey

General Report on Visitors to the Northwest Territories

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EXECUTIVE SUMMARY	5
INTRODUCTION	12
BACKGROUND	12
SURVEY DESIGN/METHODS AND FIELD METHODOLOGY	13
Population of Interest	13
Objectives of the Survey	13
Questionnaire Design and Delivery	13
Weighting of Data	15
Breakdown of Data	16
Table 1 Distribution of Survey Interviews	17
Method of Analysis:	17
SAMPLE DESIGN AND CONFIDENCE IN DATA	18
RESULTS	19
Visitor Origin and Average Party Size	19
Table 2 Visitor Origin and Average Party Size (weighted)	19
Figure 1 Origin of Visitors to the NWT as a Percentage of	20
Figure 2 Visitor Origins by Area	20
Visitor Numbers and Distribution by Area	21
Visitor Travel Mode and Primary Purpose of Visit	22
Table 4 How Visitors Travelled and Why (weighted)	22

Table 5 How Visitors Travelled to Their Destinations (weighted)	22
Figure 3 Visitors by Mode and Purpose	23
Visitor by Vehicle Type	23
Table 6 Visitors by Types of Vehicles (weighted)	23
Visitor Income	23
Table 7 Visitor Income, All Visitors (Weighted)	24
Table 8 Visitor Income by Destination (Weighted)	24
Visitor Expectations	24
Table 9 Visitor Expectations (weighted)	25
Visitor Employment	25
Table 10 Visitor Employment (weighted)	25
Activities	25
Table 11 What Visitors Did in the NWT (weighted)	26
Travel Influences	26
Table 12 Factors Which Influenced Travel (weighted)	27
Rating of Attractions	27
Table 13 Visitor Rating of Attractions: All Visitors (weighted)	27
Table 14 Visitor Rating of Attractions: Area 1, Dempster/Inuvik (weighted)	28
Table 15 Visitor Rating of Attractions: Area 2, South Mackenzie (weighted)	28
Table 16 Visitor Rating of Attractions: Area 3, Eastern Arctic (weighted)	28
Rating of Services	29
Table 17 Visitor Rating of Services: All Visitors (weighted)	29
Table 18 Visitor Rating of Services: Dempster/Inuvik (weighted)	30
Table 19 Visitor Rating of Services: South Mackenzie (weighted)	30
Table 20 Visitor Rating of Services: Eastern Arctic (weighted)	30
Average Length of Stay	31
Table 21 Average Length of Stay (unweighted)	31
When Did Visitors Decide to Visit the Northwest Territories	31
Table 22 Travel Decision Timing	32
Visitor Expenditures	32
COMPARISON WITH 1989 SURVEY	37
Number of Visitors	37
Table 23 Comparison of Visitor Numbers, 1989 and 1994	37
Origin of Visitors	38
Visitor Destinations	38
Primary Purpose of Visit	38
Visitor Income	38

Visitor Expectations	38
Activities	38
Factors Which Influenced Travel	39
Attractions and Services	39
Average Length of Stay	39
When Did Visitors Decide to Visit the Northwest Territories	39
Visitor Expenditures	39
DISCUSSION	41
RECOMMENDATIONS	43
APPENDIX A	46
APPENDIX B	51

Executive Summary

Background

Visitor exit surveys are conducted to determine visitor numbers and changes in visitor characteristics such as visitor origins, spending patterns and general demographics. Tourism indicators are maintained between exit surveys to provide insight into the relative growth or decline of visitor numbers. The last Northwest Territories (NWT) exit survey was conducted in 1989. The results of the current survey have been compiled into a report entitled *1994 Exit Survey - A General Report on Visitors to the Northwest Territories*. Copies are available from the Policy, Planning and Human Resource Division of Economic Development and Tourism.

For the purposes of this study, the NWT was divided into three Areas:

- Area 1 Dempster/Inuvik
- Area 2 South Mackenzie (South Slave, North Slave, Deh Cho)
- Area 3 Eastern Arctic (Nunavut)

Interviews were conducted with 2,294 visitors at airport locations in Yellowknife, Fort Smith, Hay River, Fort Simpson, Inuvik, Rankin Inlet, Cambridge Bay and Iqaluit. As well, surveys were administered at the Fort Providence and Peel River ferry crossings and road locations at Fort Liard and Enterprise.

Visitor Numbers and Origins

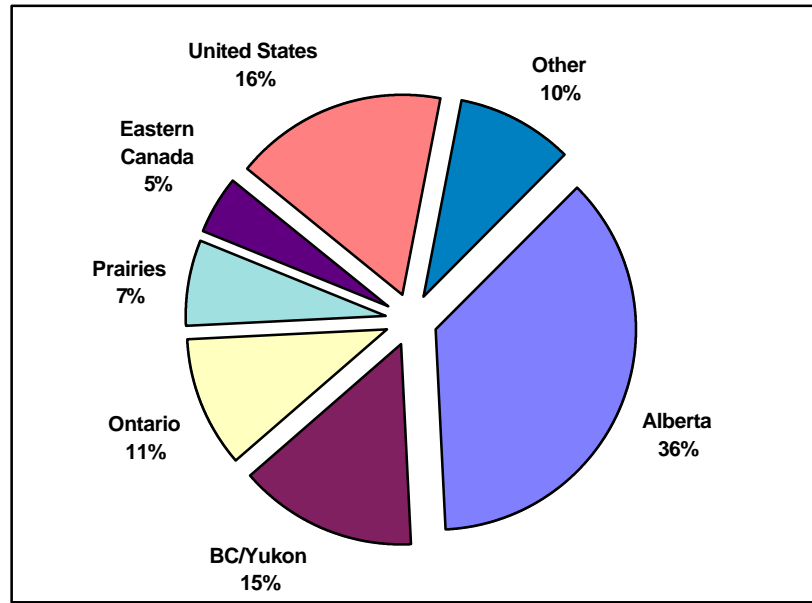
Based on data collected for the 1994 Exit Survey, the estimated number of non-resident visitors to the NWT, between May and September, was 48,262. This represents a six percent increase over the 1989 Exit Survey.¹ There has been almost no relative change in visitor origins since the previous survey, with domestic Canadian travellers accounting for primary visitation of 73%, followed by US visitors (17%) and other foreign visitors (10%).

Visitation to each of the three Areas varied considerably and was dependent upon a number of factors, particularly access to each Area and the distance between major tourism markets and the various NWT destinations. In all Areas, Canadian travellers accounted for the largest proportion of visitors - representing 76% and 88% in the South Mackenzie and Eastern Arctic respectively. However, in the Dempster/Inuvik Area, the proportion of Canadians was much lower, at 54%, with the remaining 46% originating outside of Canada - 25% from the US and 21% from outside North America.

¹Corrections to the 1989 survey methodology and results are detailed in Appendix B in the General report.

Figure 1 presents a breakdown of visitor origins. Since the 1989 exit survey, Alberta has maintained its position as the primary source of visitation to the NWT. However, British Columbia (which alone accounted for 12.8% of total visitation) has moved ahead of Ontario to the number two position.

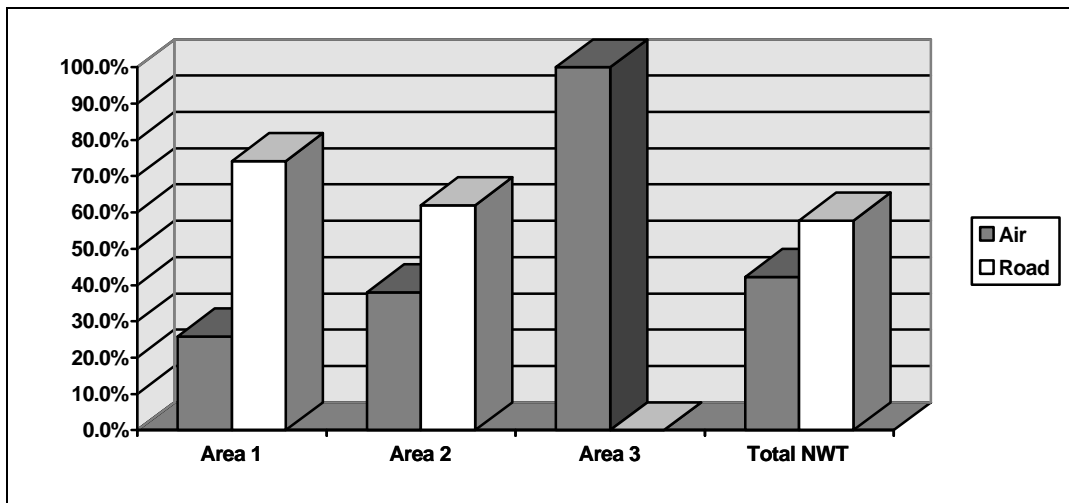
Figure 1 Visitor Origins - NWT



Trip Characteristics

Almost 43% of visitors to the NWT travelled by air. Breaking this down further, 84% of business/employment visitors arrive by air, while 24% of leisure visitors use air travel. Of course, all visitors to the Eastern Arctic travel by air due to the absence of road access.

Figure 2 breaks down mode of transportation for each of the three Areas and for the NWT as a whole.

Figure 2 Mode of Transportation

The overall average party size for visitors to the NWT was estimated as 2.3 persons with an average length of stay of 14.5 days. The average party size for Canadian travel parties is 2.2, while for American and non-North American travel parties, average party size was estimated as 2.7 and 2.8 respectively. However, these figures vary considerably when accounting for factors such as mode, or method, of travel and purpose of travel. In general, air travellers tend to stay longer and travel in smaller parties than do road travellers. Also, as the majority of business/employment travellers arrive by air, similar trip characteristics tend to apply.

Visitor Expenditures

Respondents from each of the three Areas indicated that getting to the NWT was the most expensive part of the trip. Respondents also reported package tours and gas, fuel and airfare while in the NWT as high expenditure items. More than half of all visitors reported spending less than \$100 on souvenirs and gifts. This pattern is the same for the clothing, groceries, equipment/vehicle rentals and recreation categories. Visitors to the Eastern Arctic reported higher levels of spending on arts, crafts, souvenirs and gifts than visitors to the other two Areas.

Travel Decision

On average, a representative visitor made the decision to visit the NWT approximately 5 1/2 months before travelling. The exception to this was visitors to the Dempster/Inuvik region who made their decision approximately one month earlier, or 6 1/2 months prior to their visit.

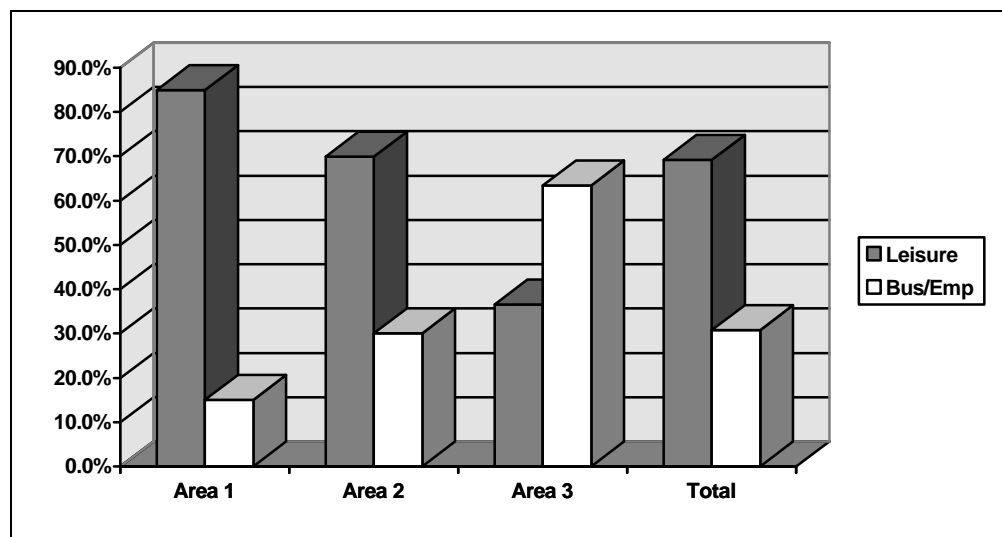
Visitor Satisfaction

The survey shows that a very high proportion of visitors to the NWT are satisfied with their visit. Specifically, 38% of all respondents felt their expectations were exceeded, while 58% felt their expectations had been met. Only 4% felt that their expectations had not been met.

Primary Purpose of Visit

As mentioned earlier, the pattern of visitor origins has remained virtually the same as found in the 1989 survey. Similarly, travellers' reasons for travel have also remained quite similar over the past five years, with the primary reason again being leisure. This pattern holds true with the exception of the Eastern Arctic which has a higher proportion of business travellers than leisure travellers. This particular characteristic in Area 3 may represent a valuable opportunity for local tourism operators to involve the business travel market in more leisure activities.

Figure 3 Reason for Travel



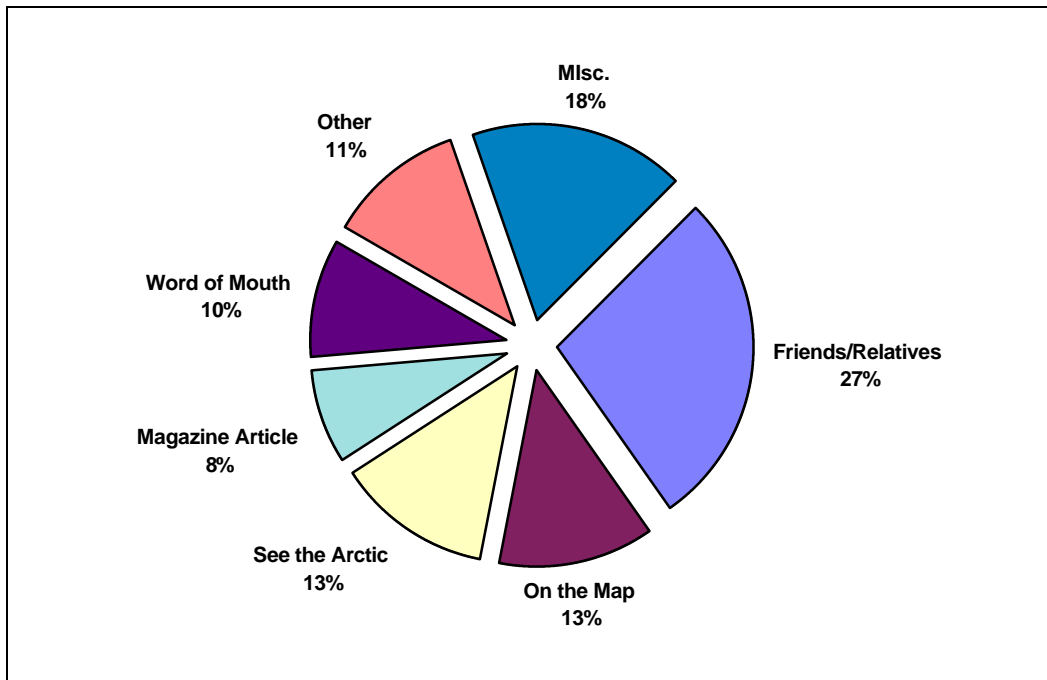
Travel Influences

Friends and relatives was rated as the most important reason for visiting. A regional examination found that this same reason was also the strongest influence for travel to the South Mackenzie and Eastern Arctic, but differed for the Dempster/Inuvik region where the desire "to see the arctic" was indicated as the most important influence affecting travel to this area.

Figure 4 provides a breakdown of the primary travel influencers indicated by respondents. The Misc. category encompasses several influencers which accounted for less than 4% of

total response. An important point which arises in this analysis concerns the print media campaign. While magazine articles accounted for 7.7% of responses, magazine advertisements had a relatively poor showing at 1.6%. Print media investment may warrant further investigation in light of this result.

Figure 4 Major Travel Influencers



Attractions/Services

Survey respondents rated attractions associated with the natural assets of the NWT extremely well, with geography, fishing, points of interest and national parks receiving the highest satisfaction ratings. The only attractions to receive significantly low ratings were hunting, nightlife/entertainment and community events. It should be noted that very few people responded to questions regarding these activities, which likely proxies low rates of participation.

With services, visitors appear to be generally satisfied. However, in rating value for money associated with accommodations, 32% of respondents gave this a low (1 or 2) rating. This result was similar with arts and crafts where visitors gave either above average or excellent ratings for arts and crafts selection but were not as enthusiastic about the prices. Low ratings were also given to tour selection and roads and highways for the NWT as a whole.

Respondents indicated that the service received at visitor centres was excellent - some of the highest ratings were given in response to the question regarding their experiences at these facilities. This trend was consistent through all the zones. There was also enthusiasm about the services received at campgrounds.

Visitor Activities

A wide range of activities were enjoyed by non-resident visitors, but those activities which encompassed the unique culture and the natural assets of the Northwest Territories were the most popular. Overall, community tours (19%), canoeing/boating (15%), fishing (13%) and hiking (11%) were the four most popular activities indicated by respondents. These activities correlated well with the high ratings attributed to natural assets as attractions.

With both activities and attractions/services of course, there was some variation among the three Areas.

Conclusions and Recommendations

Overall, visitor origins and proportions were similar to those reported in the previous exit survey, although British Columbia now represents the second largest source of visitors to the Northwest Territories, ahead of Ontario. Also, visitation by Western US states - Alaska, Washington, Oregon, Idaho and California - accounted for approximately 28% of total US visitation. The increasing importance of the West Coast visitor market may warrant consideration of projects similar to the Dawson City visitor centre, or improved access and amenities on the Liard Highway. Promotional efforts aimed at traffic travelling to Alaska may also reap benefits in terms of increased visitation.

Travel to the Northwest Territories continues to be primarily for leisure purposes, with the exception of the Eastern Arctic which shows a higher proportion of business/employment travellers. This result presents itself as an opportunity to target the business/employment market as having under-exploited leisure potential - these travellers may be persuaded to expand their stay to include leisure activities.

Travel influencers were dominated by factors which are tied directly to the Northwest Territories. The importance of friends and relatives and informal influencers like "*on the map*", "*to see the Arctic*" and "*word of mouth*" stress the importance of reputation and meeting the travellers' expectations. These influencers must be considered in how the NWT is marketed to potential visitors, particularly in light of the responses to magazine and other advertisements as influencers.

For the most part the level of traveller satisfaction is high - 96% of respondents stated that their expectations were either met or exceeded. However, there remain areas which require improvement. One area in particular concerns product development. In the Eastern Arctic community tours was the activity pursued most often by travellers, yet tour

selection was rated as poor by 39% of respondents. This is likely indicative of unsatisfied demand in that market.

Introduction

This document is based on the results of an exit survey conducted throughout the Northwest Territories from July to September of 1994. The survey was designed to gather information on both resident and non-resident travellers including employment, income, activity patterns and likes and dislikes while visiting the NWT. It presents the general results for visitors to the NWT from other countries and other regions in Canada. More detailed analysis on areas of specific interest can be conducted by the Planning section of Policy and Planning (ED&T) upon request.

The staff of the Policy, Planning & Human Resources division (PP&HR) of the department Economic Development and Tourism (ED&T), in consultation with regional offices, completed all phases of the project in-house. The questionnaire and field manual were both designed and developed by departmental personnel. Database design and development, data analysis and report production were also done by the staff of the Planning Unit of PP&HR.

Measures were taken to reduce the costs associated with the completion of the 1994 Exit Survey and to keep the economic benefits within the NWT. The administration, employment and ancillary services required to undertake and complete the 1994 Exit Survey were NWT based. All surveyors were NWT residents, and for the most part, were summer students. All contractors responsible for the administration of the Exit Survey in their region were NWT companies. All suppliers of ancillary items such as surveyor uniforms and bags were NWT owned enterprises. In addition, an NWT company was contracted to print the questionnaire.

Background

In 1994, Economic Development and Tourism launched several surveys with the aim of obtaining detailed information on travellers and visitor services in the NWT. These included a survey of visitors to visitor centres in the NWT, a telephone survey focused on the day use of parks and campgrounds, a diary project where visitors recorded, in detail, their expenditures and activities over the course of their visit to the Territories, a survey of users of the NWT 1-800 number², and a more limited version of a 1993 campground survey. In addition, the Department is currently reviewing campground permits and visitor centre log books for information which will add to visitor profiles.

The exit survey was the most comprehensive project of its type conducted in the tourism area in 1994; the last major NWT-wide exit survey was conducted in 1989. Industry and

² The 1-800 number is a service where callers can obtain information relevant to travel in the NWT

government felt that it was time to obtain updated information on visitors to the NWT. This information is vital for planning tourism infrastructure, promotion, and marketing. Although several regional surveys were conducted between 1989 and 1994, no survey attempted to cover all regions.

Survey Design/Methods and Field Methodology

Population of Interest

The population for the purpose of this report was identified as individuals, normally residing outside the Northwest Territories, who visited the Northwest Territories over the period July 1 to September 30, 1994.

Objectives of the Survey

The principal objectives of undertaking the visitor exit survey were:

- to develop a base line profile of visitors to the Northwest Territories (i.e. origin, mode of transport, purpose of trip, travel influences and income & employment categories);
- to determine primary destinations and activities of visitors;
- to determine visitors' representative responses to a variety of attractions and services offered in the Northwest Territories; and
- to develop indicative measures of success for marketing efforts in a variety of markets and market locations.

Questionnaire Design and Delivery

The questionnaire consisted of 21 questions covering a variety of topics including the traveller's origin, primary destination, activities undertaken and income level. The surveys were administered at eight airports and four highway locations. Two major criteria needed to be satisfied before a location could be accepted as a survey point.

1. Was the location a main departure point for a region?
2. Were surveyors available to administer the questionnaires?

Based on the above criteria the selected survey locations were as follows:

- Area 1: Inuvik Airport and Peel River ferry crossing;
- Area 2: Yellowknife Airport, Hay River Airport, Fort Smith Airport, Ft. Simpson Airport, Enterprise, Ft. Providence ferry crossing and Liard highway;
- Area 3: Iqaluit Airport, Rankin Inlet Airport, and Cambridge Bay Airport.

Questionnaire Administration

To meet regional sampling quotas, a schedule was developed for each survey location. Surveyors working at airports with multiple daily departures were provided with a list of flights to be surveyed. For those airports with minimal departures, all flights were to be surveyed. For road survey points, a schedule was developed so that visitors travelling at all times of the day at the various highway and ferry locations would be surveyed.

In addition to the 1994 Exit Survey questionnaires, tally sheets were maintained to determine the ratio of resident and non-resident travellers and their reasons for travel. Surveying was conducted seven days a week with questionnaires being administered six days a week. On alternate Mondays and Fridays, the surveyors completed the tally sheet.

Completed surveys and tally sheets were returned to Economic Development and Tourism in Yellowknife where they were reviewed for completeness. Survey forms were coded and weekly reports were produced detailing the number of surveys returned for each region. This process allowed headquarters to ensure survey methodology was being followed and minimum sample sizes for each region were achieved.

Field Personnel

An Exit Survey coordinator was hired at headquarters to assist the regional offices and ensure the survey ran smoothly and that survey methodology was followed. Regional Tourism Officers (RTOs) hired the surveyors and any regional contractors required to administer the survey. All questionnaires were sent to the coordinator where they were prescreened, coded, edited and data entered. All day-to-day issues were dealt with by the RTOs and the coordinator.

As noted, each regional office hired all survey staff for their region; summer students were used whenever possible. In some cases, contracts were tendered to facilitate the Exit Survey. For example, the South Slave region had a number of survey locations over a broad area so they contracted the South Slave Research Centre to undertake the survey related tasks.

Other regions, especially those with only one or two daily airport departures, combined duties. For example, one region hired a student to administer surveys at the airport as well as work in the regional office when they were not required to perform their duties as a surveyor.

Both highway points, ferry locations and airports with multiple daily departures were staffed with dedicated survey administrators.

Equipment

A “uniform” was developed for the interviewers. It consisted of a T-shirt or sweatshirt, a ball cap, coat and a canvas briefcase on which the slogan “Travel ‘94” was printed. The

purpose was to more clearly identify the interviewers to the general public and to ease potential respondents' anxiety when they were initially approached by the interviewers.

Safety equipment was issued for all personnel at road and ferry survey locations which consisted of orange safety vests and hand-held stop signs. Extra precautions were taken at the Enterprise site where surveyors were required to flag down motorists. In addition to the standard safety equipment, this particular location was equipped with two 4' x 4' portable roadside signs. As an additional precaution, all surveyors at highway and ferry locations were required to work with a partner.

Weighting of Data

Weighting of the data was employed to expand the sample to reflect all non-resident travellers to the Northwest Territories over the July to September survey period. The weighting was accomplished with the following formulations:

$$(1) \quad \frac{a}{b} \times \frac{pv}{s(v+r)}$$

where: a = total number of flights
 b = flights met over survey period
 p = passenger counts on flights met
 r = number of residents
 s = number of non-resident visitors actually surveyed
 v = number of non-resident visitors

$$(2) \quad \frac{t}{s} \times \frac{v}{(v+r)} \times (aps)$$

where: aps = average party size
 r = resident cars met
 s = number of non-resident cars surveyed
 t = total number of cars
 v = non-resident cars met

Weighting formula (1) applies to air travellers, while (2) applies to road travellers. The weighting formulas are broken into two components. The first term represents the gross weighting by mode type (i.e. for air this is flights and for road this is light vehicle traffic).

The second term adjusts the weighting by the usable component of the available population (i.e. the proportion of non-resident travellers to total travellers) accounting for the size of the sample taken.

Weights are determined for each of the survey locations. Applying the weights to the survey sample yields the estimated (weighted-up) population. Note that for the three survey locations at ferry crossings, full counting of non-resident travellers over the summer months is undertaken annually by the department of Economic Development Tourism. Therefore, the weighting scheme for these survey locations effectively becomes:

$$(3) \quad v \times (aps)$$

where: v = non-resident cars met
 aps = average party size

Breakdown of Data

The 1994 visitor exit survey resulted in 2,600 completed interviews of non-resident travellers, of which approximately 11 percent were refusals, resulting in a usable sample of 2,294 non-resident travellers. From this sample, and employing the weighting factors described above, an estimated population of 33,808 was established for the period July 1 to September 30, 1994.

The distribution of the useful sample across survey locations and regions, and the sampling period is as follows:

Table 1 Distribution of Survey Interviews

Survey Location	Jun	Jul	Aug	Sep	Total	% of Total
AREA 1					431	18.8%
Inuvik	0	71	80	51	202	8.8%
Peel River	0	90	85	54	229	10.0%
AREA 2					1,339	58.4%
Enterprise	0	52	22	0	74	3.2%
Fort Smith	5	17	16	3	41	1.8%
Ft. Providence	0	277	190	11	478	20.8%
Ft. Simpson	3	68	83	29	183	8.0%
Hay River	0	55	61	17	133	5.8%
Liard	3	17	12	0	32	1.4%
Yellowknife	0	121	153	124	398	17.3%
AREA 3					524	22.8%
Cambridge Bay	5	39	49	75	168	7.3%
Iqaluit	9	68	140	27	244	10.6%
Rankin Inlet	8	18	15	71	112	4.9%
TOTAL	33	893	906	462	2,294	
Percentage Total by Month	1.4%	38.9%	39.5%	20.1%		

Method of Analysis:

The analysis of the collected data is presented in three formats:

- visitor origin and distribution by destination;
- profiles of the visiting, non-resident population in question, in the form of weighted data; and
- representative indicators of travellers' participation, perceptions and satisfaction with respect to a variety of activities, attractions and services while in the Northwest Territories.

The data has been tabulated by four primary variables:

- survey location, by area;
- mode of transportation;
- primary purpose of visit; and
- origin of traveller.

Sample Design and Confidence in Data

The survey was based on a stratified sample design constructed on four levels: geographic destination, residency, reason for travel, and mode of travel. Geographic destination had two divisions: east and west. West was subdivided into Area 1, Dempster Highway/Inuvik, and Area 2, South Mackenzie. The Eastern Arctic was called Area 3. Residency had two categories: resident of the NWT but not a resident of the exiting region, and non-resident of the NWT³. Reason for travel had two categories: leisure and business/employment. Mode of travel was either road or air.

Our estimate for the overall size of the target population (visitors and residents not of the region) is 36,142 parties for the period of the survey.⁴ With 3040 usable surveys, our capture rate was 8.4 %. At a 95% confidence level, the standard error of the estimate is 1.5%. This represents excellent statistical reliability. However, this estimate applies to the data considered as a whole.

³ This classification does not apply to the present report, which analyses only non-resident travellers

⁴ Note that this target population is composed of sampling units for the entire exit survey, and differs from the population of interest for this report.

Results

Visitor Origin and Average Party Size

Table 2 shows visitor origin by Canadian point of origin, US and other foreign countries. Canada represents the largest portion (73%) of all visitors to the NWT. Foreign tourist visitation represents about 27% of all visitors, with the US accounting for most foreign visitation.

Table 2 Visitor Origin and Average Party Size (weighted)

Origin	# of Visitors	Avg. Party Size	% of Total
CANADA	24,776	2.2	73.3%
Alberta	12,359	2.3	36.6%
Ontario	3,594	2.4	10.6%
B.C. / Yukon	4,936	2.0	14.6%
Prairies	2,348	2.1	6.9%
Eastern Canada	1,539	2.2	4.6%
USA	5,817	2.7	17.2%
California	578		1.7%
Michigan	504		1.5%
Washington	495		1.5%
Texas	382		1.1%
Alaska	375		1.1%
OTHER	3,215	2.8	9.5%
TOTAL	33,808	2.3	100.0%

Average party size tends to be larger for foreign visitors when compared to Canadian visitors to the NWT. For Canadians, average party size ranges from 2.0 (BC/Yukon) to 2.4 (Ontario). Foreign visitor party sizes were 2.7 for the US and 2.8 for other countries.

Figure 1 shows the breakdown of visitor origin by Canadian and US point of origin. Albertans account for the largest number of visitations from Canada; British Columbia and Ontario residents follow - BC has moved ahead of Ontario in overall visitation since the previous study. The Pacific and Mountain states are important sources of visitors for the NWT. California, Washington and Alaska accounted for 25% of visitation from the US.

Figure 1 Origin of Visitors to the NWT as a Percentage of Total Canadian Visitation

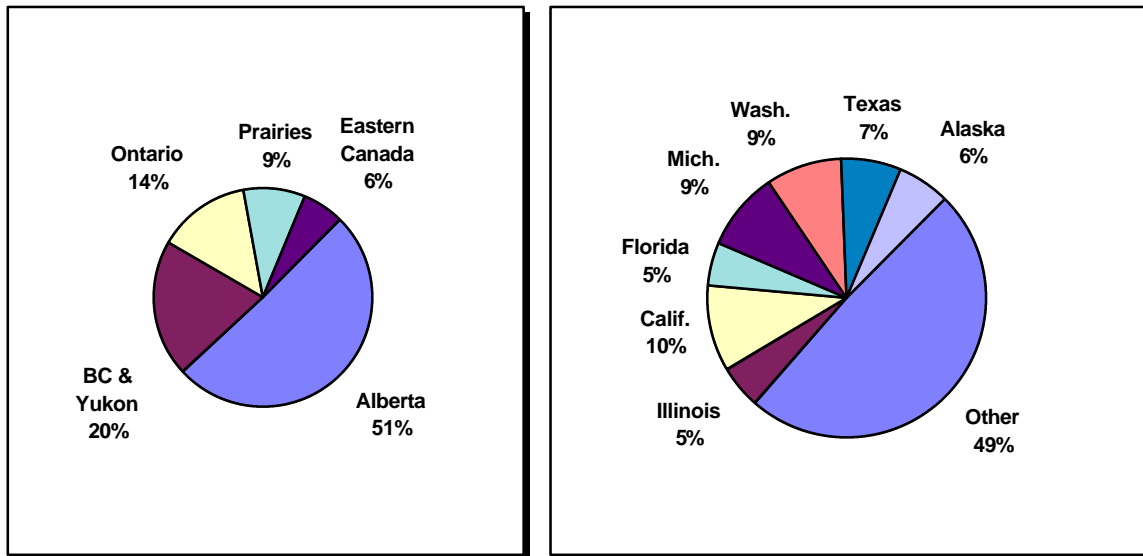
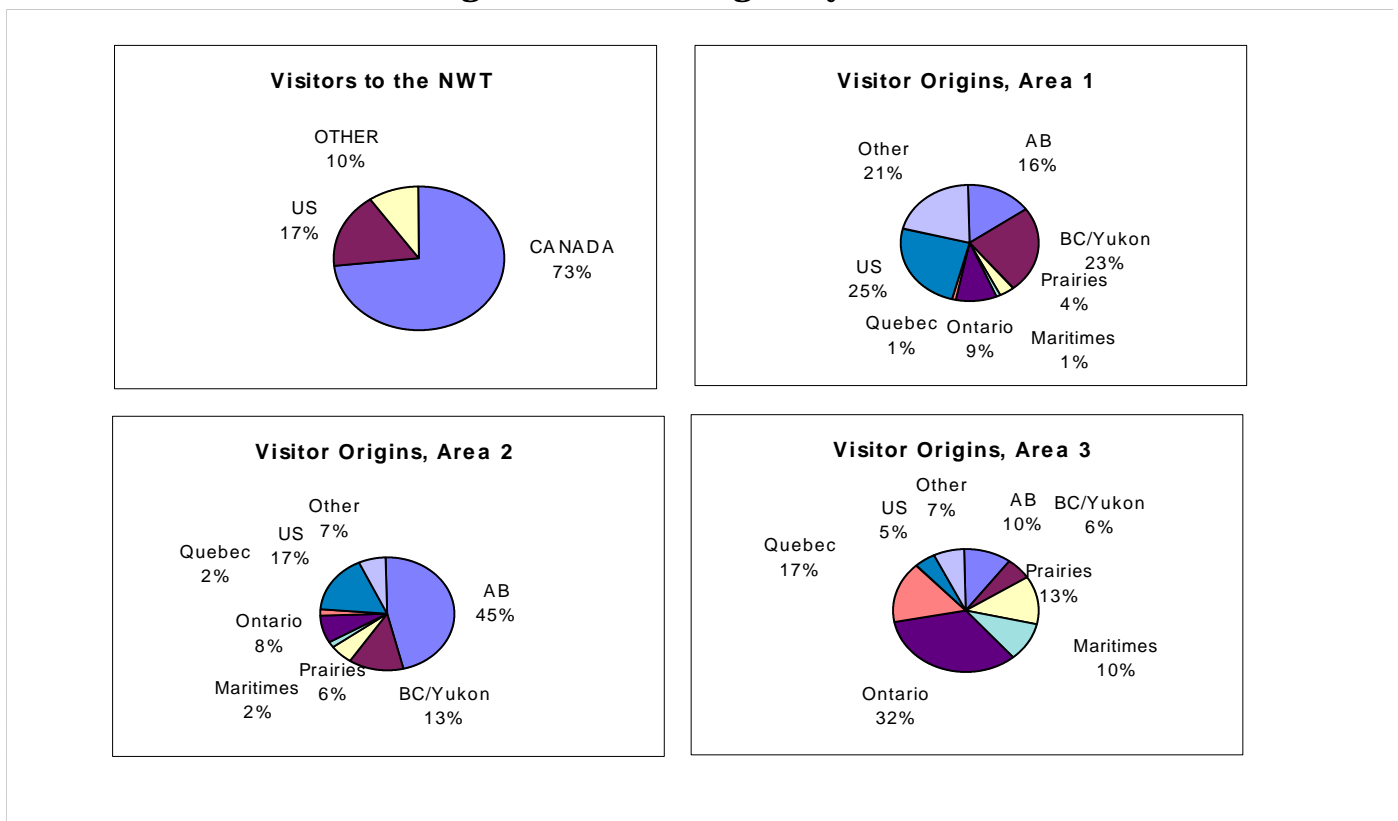


Figure 2 Visitor Origins by Area



The largest proportion of foreign travellers (US and other) visited the Dempster/Inuvik region (Area 1), where these visitors accounted for 46% of all visitation. The foreign

component of visitation drops to 24% for the South Mackenzie (Area 2) and further to 12% for the Eastern Arctic (Area 3). In the South Mackenzie, Alberta accounts for a full 45% of all visitors, followed by the US, and BC/Yukon. In the Eastern Arctic, Ontario accounts for the most visitors (32%), followed by Quebec (17%), and the Prairies (13%).

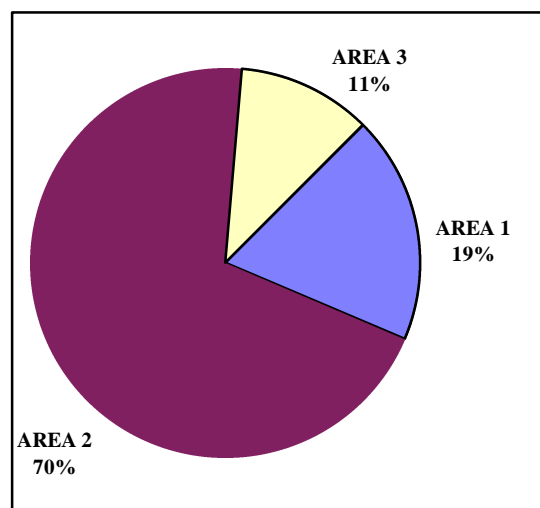
Visitor Numbers and Distribution by Area

Table 3 presents the weighted estimated visitor numbers and distribution by region. Figure 3 shows the relative distribution of visitors among the three Areas. In total, an estimated 33,808 non-resident travellers visited the NWT from the beginning of July, 1994 through to the end of September 1994. The South Mackenzie received by far the largest number of visitors, estimated at almost 24,000 over the survey period. Over 6,300 people visited Inuvik, mostly via the Dempster Highway, and the Eastern Arctic received over 3,500 visitors, almost two thirds of whom went to Baffin Island.

Table 3 Visitor Distribution (weighted)

Survey Location	Total	% of Total
AREA 1	6,330	18.7%
Inuvik	1,637	4.8%
Peel river	4,692	13.9%
AREA 2	23,894	70.7%
Enterprise	5,301	15.7%
Fort Smith	575	1.7%
Ft. Providence	6,486	19.2%
Ft. Simpson	198	0.6%
Hay River	1,050	3.1%
Liard	3,056	9.0%
Yellowknife	7,228	21.4%
AREA 3	3,584	10.6%
Cambridge Bay	271	0.8%
Iqaluit	2,430	7.2%
Rankin Inlet	884	2.6%
TOTAL	33,808	100%

Figure 3 Visitor Distribution by Area



Visitor Travel Mode and Primary Purpose of Visit

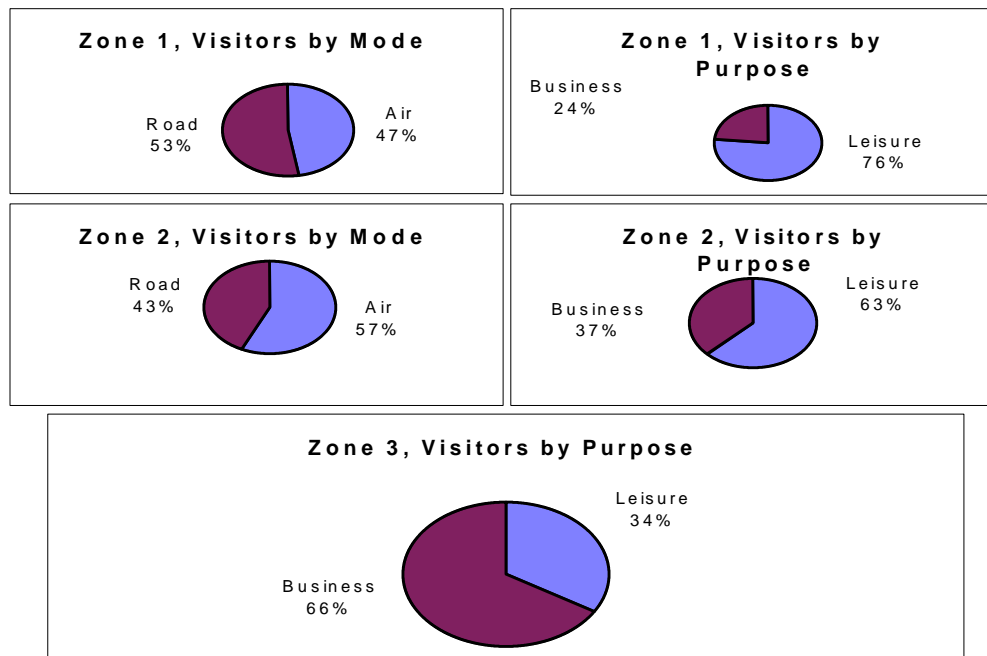
In the Western Arctic (Areas 1 and 2), more leisure visitors travelled by road than by air; the situation is reversed for business travellers (tables 4 and 5). In the Eastern Arctic (Area 3), almost twice as many visitors travelled for business as opposed to leisure. In the Western Arctic, more visitors were travelling for leisure than for business (refer to figure 3).

Table 4 How Visitors Travelled and Why (weighted)

	TOTAL				AREA1				AREA2				AREA3	
	Air	%Air	Rrd	%Rrd	Air	%Air	Rrd	%Rrd	Air	%Air	Rrd	%Rrd	Air	%Air
Leisure	5,484	23.5%	17,842	76.5%	932	17.3%	4,446	82.7%	3,240	19.5%	13,396	80.5%	1,312	100.0%
Business	8,775	84.4%	1,622	15.6%	705	74.2%	245	25.8%	5,801	80.8%	1,376	19.2%	2,270	100.0%
TOTAL	14,259	42.3%	19,464	57.7%	1,637	25.9%	4,691	74.1%	9,041	38.0%	14,772	62.0%	3,582	100.0%

Table 5 How Visitors Travelled to Their Destinations (weighted)

Origin	Air	% Air	Road	% Road	Total
CANADA	11,852	47.8%	12,924	52.2%	24,776
Alberta	5,084	20.5%	7,275	29.4%	12,359
Ontario	2,324	9.4%	1,270	5.1%	3,594
British Columbia	2,082	8.4%	2,245	9.1%	4,327
Manitoba	643	2.6%	377	1.5%	1,020
Saskatchewan	334	1.3%	994	4.0%	1,328
Quebec	680	2.7%	61	0.2%	741
Maritimes	654	2.6%	144	0.6%	798
Yukon Territory	51	0.2%	558	2.3%	609
USA	1,622	6.5%	4,195	16.9%	5,817
California	149	0.6%	429	1.7%	578
Michigan	123	0.5%	381	1.5%	504
Washington	69	0.3%	426	1.7%	495
Texas	46	0.2%	336	1.4%	382
Alaska	0	0.0%	375	1.5%	375
OTHER	801	3.2%	2,414	9.7%	3,215

Figure 3 Visitors by Mode and Purpose**Visitor by Vehicle Type**

Cars and light trucks made up the largest proportion of vehicle traffic in overall visitation (table 6). Recreational vehicles (RV) and campers represented a higher proportion of vehicles in Area 2 (Dempster/Inuvik) than Area 1 (South Mackenzie). These vehicles were the second most popular form of transport for visitors travelling by road.

Table 6 Visitors by Types of Vehicles (weighted)

Vehicle Type	AREA 1	AREA 2	TOTAL
Car / Pickup	2,807	5,482	8,289
RV or Camper	1,557	4,593	6,150
Tour Bus	61	98	159
Other	184	1,011	1,195
TOTAL	4,609	11,184	15,793

Visitor Income

Overall, visitors reported relatively high family incomes (table 7). Most visitors indicated family incomes in the range of \$40-\$60 thousand. Almost 70% of visitors reported family incomes greater than \$40 thousand. This pattern holds true for all three Area destinations

(table 8). A larger proportion of visitors to the Eastern Arctic reported in the three top income categories than visitors to other destinations.

Table 7 Visitor Income, All Visitors (Weighted)

Income Group	Parties	% of Total
Under \$20,000	1,962	7.9%
\$20,001 - \$40,000	5,722	23.0%
\$40,001 - \$60,000	7,745	31.2%
\$60,001 - \$80,000	4,844	19.5%
Over \$80,001	4,584	18.4%
TOTAL	24,857	100.0%

Table 8 Visitor Income by Destination (Weighted)

Income Group	Parties
AREA 1	
Under \$20,000	462
\$20,001 - \$40,000	953
\$40,001 - \$60,000	1,263
\$60,001 - \$80,000	755
Over \$80,001	771
TOTAL	4,204
AREA 2	
Under \$20,000	1,298
\$20,001 - \$40,000	4,337
\$40,001 - \$60,000	5,512
\$60,001 - \$80,000	3,428
Over \$80,001	3,279
TOTAL	17,854
AREA 3	
Under \$20,000	201
\$20,001 - \$40,000	433
\$40,001 - \$60,000	970
\$60,001 - \$80,000	661
Over \$80,001	534
TOTAL	2,799

Visitor Expectations

Overall, 96% of all visitors felt that their time in the NWT met or exceeded their expectations (table 9). Visitors to the Eastern Arctic (56%) were most likely to feel that their

visit had exceeded their expectations. This is followed by Dempster/Inuvik (46%) and the South Slave (33%).

Table 9 Visitor Expectations (weighted)

	Respondents	Exceeded	% of Total	Met	% of Total	Not Met	% of Total
AREA 1	5,320	2,449	46.0%	2,655	49.9%	216	4.1%
AREA 2	16,262	5,417	33.3%	10,191	62.7%	654	4.0%
AREA 3	1,249	703	56.3%	498	39.9%	48	3.8%
TOTAL	22,831	8,569	37.5%	13,344	58.4%	918	4.0%

Visitor Employment

Of the respondents, almost 45% reported that they were employed, another 18% said that they were self-employed, followed by retired (17.6%), professional (13%) and students (5%). When the employment question was examined more closely, (see Table 10), the most frequently cited answer differed between each area. Visitors to the Eastern Arctic were the most likely to report that they were professionals (19%) while visitors to the South Mackenzie were most likely to say they were retired (19%). Visitors to the Inuvik/Dempster region were most likely to respond that they were self-employed (22%).

Table 10 Visitor Employment (weighted)

	AREA 1		AREA 2		AREA 3		TOTAL	
	Parties	% of Total	Parties	% of Total	Parties	% of Total	Parties	% of Total
Respondents	4,260	16.8%	18,190	71.8%	2,898	11.4%	25,348	
% Who Respondents	67.3%		76.1%		80.8%		75.0%	
Employed	1,434	33.7%	8,369	46.0%	1,426	49.2%	11,229	44.3%
Self Employed	944	22.2%	3,126	17.2%	470	16.2%	4,540	17.9%
Professional	754	17.7%	1,993	11.0%	547	18.9%	3,294	13.0%
Retired	728	17.1%	3,501	19.2%	228	7.9%	4,457	17.6%
Student	318	7.5%	770	4.2%	192	6.6%	1,280	5.0%
Other	82	1.9%	344	1.9%	23	0.8%	449	1.8%
Not Applicable	0	0.0%	87	0.5%	12	0.4%	99	0.4%

Activities

There was considerable variation in visitor activities among travel destinations (table 11). Overall, community tours was the most popular activity among visitors to the NWT while fishing and canoeing/boating were the two favoured activities by visitors to the South Mackenzie. Visitors travelling the Dempster were most likely to report community tours and

cultural activities as the most popular activities. Visitors to the Eastern Arctic also reported community tours as their most frequent activity followed by fishing and hiking.

Table 11 What Visitors Did in the NWT (weighted)

	AREA 1		AREA 2		AREA 3		TOTAL	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
Airplane Rides	193	3.5%	211	2.6%	0	0.0%	404	2.8%
Canoeing / Boating	644	11.8%	1,408	17.6%	123	12.5%	2,175	15.1%
Community Tours	1,416	25.9%	1,055	13.2%	226	22.9%	2,697	18.7%
Cultural	771	14.1%	440	5.5%	16	1.6%	1,227	8.5%
Fishing	163	3.0%	1,567	19.6%	160	16.2%	1,890	13.1%
Hiking	457	8.4%	964	12.1%	154	15.6%	1,575	10.9%
Historical	543	9.9%	486	6.1%	72	7.3%	1,101	7.6%
Hunting	32	0.6%	20	0.3%	10	1.0%	62	0.4%
Naturalist	363	6.6%	591	7.4%	128	13.0%	1,082	7.5%
Other	434	7.9%	599	7.5%	43	4.4%	1,076	7.5%
Photography	454	8.3%	643	8.1%	55	5.6%	1,152	8.0%
TOTAL	5,470	37.9%	7,984	55.3%	987	6.8%	14,441	100.0%

Travel Influences

The most important influencer of travel to the NWT was the desire to visit family and friends (table 12). This factor was strongest for visitors to the South Mackenzie (33.5%) and the Eastern Arctic (35.6%). The general desire “to see the Arctic” was a major factor influencing travel along the Dempster Highway (28.5%) and the Eastern Arctic (20.5%). For all destinations, “word of mouth” was reported as an important influence. This was especially important in areas 1 and 2.

One point which does arise from the analysis of the various travel influencers is the focus of the print media campaign. Responses indicate that magazine articles present a relatively more effective influence on potential travellers than magazine advertisements, or “other ads”. The focus of investment in this campaign may warrant further study.

Table 12 Factors Which Influenced Travel (weighted)

	AREA 1		AREA 2		AREA 3		TOTAL	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
1-800 #	111	1.3%	247	1.1%	20	1.3%	378	1.2%
Adventure	29	0.3%	86	0.4%	0	0.0%	115	0.4%
Business / Employment	20	0.2%	1	0.0%	8	0.5%	29	0.1%
Explorers' Guide	237	2.7%	722	3.3%	18	1.1%	977	3.0%
Fishing / Hunting	8	0.1%	207	0.9%	13	0.8%	228	0.7%
Friends / Relatives	1,124	12.7%	7,396	33.5%	565	35.6%	9,085	27.9%
General Interest	0	0.0%	101	0.5%	13	0.8%	114	0.4%
Lived Here Before	196	2.2%	1,086	4.9%	50	3.1%	1,332	4.1%
Magazine Ad	196	2.2%	314	1.4%	10	0.6%	520	1.6%
Magazine Article	1,076	12.2%	1,339	6.1%	76	4.8%	2,491	7.7%
Movie / Television	0	0.0%	47	0.2%	0	0.0%	47	0.1%
On the Map	1,298	14.7%	2,776	12.6%	57	3.6%	4,131	12.7%
Other	531	6.0%	2,900	13.1%	243	15.3%	3,674	11.3%
Other Ads	348	3.9%	755	3.4%	50	3.1%	1,153	3.5%
Outdoor / Sports Show	0	0.0%	36	0.2%	12	0.8%	48	0.1%
Remoteness	8	0.1%	0	0.0%	0	0.0%	8	0.0%
To See the Arctic	2,523	28.5%	1,347	6.1%	326	20.5%	4,196	12.9%
Travel Agent	196	2.2%	423	1.9%	20	1.3%	639	2.0%
Visited Before	0	0.0%	182	0.8%	0	0.0%	182	0.6%
Word of Mouth	938	10.6%	2,143	9.7%	107	6.7%	3,188	9.8%
TOTAL	8,839	27.2%	22,108	68.0%	1,588	4.9%	32,535	100.0%

Rating of Attractions

The NWT scored highly among visitors for most attractions (table 13). The only attractions which received significantly low ratings were hunting, nightlife/entertainment and community events. Overall, highest ratings went to hiking/sightseeing/camping, geography, camping, national parks, and water sports. Eastern Arctic visitors gave the highest ratings among visitors to observing wildlife and nature. There was some important regional variation in rating of attractions which have been outlined in tables 14 to 16.

Table 13 Visitor Rating of Attractions: All Visitors (weighted)

	RATING SCALE										RESPONDENTS	
	Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties	% of Total
	Rating of 1						Rating of 5					
Observing Wildlife/Nature	1,351	5.1%	2,301	8.7%	6,569	24.9%	7,232	27.4%	8,953	33.9%	26,406	78.1%
Hiking/Sightseeing/Camping	307	1.3%	1,343	5.8%	4,347	18.8%	8,285	35.8%	8,875	38.3%	23,157	68.5%
Native Culture	764	3.4%	1,254	5.5%	5,539	24.3%	7,745	34.0%	7,475	32.8%	22,777	67.4%
Community Events	842	6.7%	1,584	12.6%	3,997	31.8%	3,886	30.9%	2,247	17.9%	12,556	37.1%
Water Sports	674	5.4%	759	6.1%	2,809	22.6%	3,419	27.5%	4,778	38.4%	12,439	36.8%
National Parks	303	2.0%	580	3.7%	3,293	21.3%	4,701	30.4%	6,604	42.7%	15,481	45.8%
Camping	475	2.6%	600	3.3%	3,162	17.5%	6,509	36.0%	7,349	40.6%	18,095	53.5%
Fishing	521	3.8%	636	4.6%	1,970	14.2%	3,310	23.9%	7,396	53.5%	13,833	40.9%
Hunting	533	12.1%	337	7.6%	896	20.3%	967	21.9%	1,679	38.1%	4,412	13.1%
Nightlife/Entertainment	1,708	13.2%	2,215	17.1%	3,873	29.9%	3,182	24.6%	1,971	15.2%	12,949	38.3%
Geography	300	1.2%	458	1.8%	3,211	12.4%	7,322	28.4%	14,515	56.2%	25,806	76.3%
Points of Interest	334	1.5%	668	3.0%	4,240	18.8%	8,291	36.7%	9,063	40.1%	22,596	66.8%

Table 14 Visitor Rating of Attractions: Area 1, Dempster/Inuvik (weighted)

	RATING SCALE										RESPONDENTS	
	Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties	% of Total
	Rating of 1								Rating of 5			
Observing Wildlife/Nature	557	10.0%	867	15.6%	1,333	24.0%	1,266	22.8%	1,530	27.6%	5,553	87.7%
Hiking/Sightseeing/Camping	49	1.0%	332	7.1%	973	20.8%	1,643	35.1%	1,686	36.0%	4,683	74.0%
Native Culture	94	1.8%	180	3.4%	1,120	21.1%	2,056	38.7%	1,866	35.1%	5,316	84.0%
Community Events	131	4.5%	482	16.6%	964	33.2%	800	27.6%	526	18.1%	2,903	45.9%
Water Sports	172	7.4%	180	7.7%	580	24.8%	592	25.3%	815	34.8%	2,339	37.0%
National Parks	82	3.1%	119	4.4%	671	25.0%	843	31.4%	969	36.1%	2,684	42.4%
Camping	78	1.9%	176	4.3%	810	19.7%	1,517	36.9%	1,525	37.1%	4,106	64.9%
Fishing	114	5.5%	163	7.8%	323	15.5%	609	29.2%	880	42.1%	2,089	33.0%
Hunting	201	19.2%	49	4.7%	184	17.5%	273	26.0%	342	32.6%	1,049	16.6%
Nightlife/Entertainment	462	18.6%	384	15.4%	632	25.4%	603	24.2%	408	16.4%	2,489	39.3%
Geography	65	1.4%	86	1.9%	491	10.8%	1,336	29.5%	2,558	56.4%	4,536	71.7%
Points of Interest	78	1.7%	86	1.8%	1,014	21.7%	1,630	34.8%	1,874	40.0%	4,682	74.0%

Table 15 Visitor Rating of Attractions: Area 2, South Mackenzie (weighted)

	RATING SCALE										RESPONDENTS	
	Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties	% of Total
	Rating of 1								Rating of 5			
Observing Wildlife/Nature	735	4.1%	1,276	7.1%	4,644	25.7%	5,236	29.0%	6,150	34.1%	18,041	75.5%
Hiking/Sightseeing/Camping	200	1.3%	905	5.7%	3,046	19.2%	5,762	36.3%	5,940	37.5%	15,853	66.3%
Native Culture	538	3.7%	904	6.2%	3,907	26.8%	4,741	32.5%	4,505	30.9%	14,595	61.1%
Community Events	438	5.4%	878	10.8%	2,577	31.7%	2,778	34.1%	1,464	18.0%	8,135	34.0%
Water Sports	312	3.5%	444	5.0%	2,031	22.7%	2,587	28.9%	3,571	39.9%	8,945	37.4%
National Parks	142	1.2%	397	3.4%	2,514	21.5%	3,556	30.5%	5,066	43.4%	11,675	48.9%
Camping	326	2.6%	395	3.1%	2,153	17.2%	4,618	36.8%	5,056	40.3%	12,548	52.5%
Fishing	327	3.2%	394	3.9%	1,478	14.5%	2,364	23.2%	5,644	55.3%	10,207	42.7%
Hunting	228	8.3%	245	8.9%	645	23.4%	561	20.4%	1,072	39.0%	2,751	11.5%
Nightlife/Entertainment	699	8.0%	1,448	16.6%	2,784	32.0%	2,389	27.4%	1,390	16.0%	8,710	36.5%

Table 16 Visitor Rating of Attractions: Area 3, Eastern Arctic (weighted)

	RATING SCALE										RESPONDENTS	
	Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties	% of Total
	Rating of 1								Rating of 5			
Observing Wildlife/Nature	59	2.1%	158	5.6%	592	21.1%	730	26.0%	1,273	45.3%	2,812	78.4%
Hiking/Sightseeing/Camping	58	2.2%	107	4.1%	329	12.6%	879	33.5%	1,248	47.6%	2,621	73.1%
Native Culture	132	4.6%	170	5.9%	513	17.9%	948	33.1%	1,105	38.5%	2,868	80.0%
Community Events	272	17.9%	224	14.8%	456	30.1%	308	20.3%	257	16.9%	1,517	42.3%
Water Sports	191	16.5%	135	11.7%	198	17.1%	240	20.8%	392	33.9%	1,156	32.2%
National Parks	80	7.1%	64	5.7%	108	9.6%	303	27.0%	569	50.6%	1,124	31.4%
Camping	71	4.9%	29	2.0%	199	13.8%	374	26.0%	767	53.3%	1,440	40.2%
Fishing	80	5.2%	78	5.1%	169	11.0%	338	22.0%	871	56.7%	1,536	42.8%
Hunting	104	17.0%	43	7.0%	67	10.9%	133	21.7%	265	43.3%	612	17.1%
Nightlife/Entertainment	547	31.3%	384	21.9%	457	26.1%	189	10.8%	173	9.9%	1,750	48.8%
Geography	64	2.1%	80	2.7%	409	13.6%	719	23.9%	1,732	57.7%	3,004	83.8%
Points of Interest	75	2.8%	104	3.9%	522	19.7%	905	34.2%	1,043	39.4%	2,649	73.9%

Rating of Services

Visitors in the Dempster/Inuvik area were more likely to give a higher rating to roads and highways than visitors to the South Mackenzie.

A greater proportion of visitors to the Eastern Arctic gave excellent ratings to arts and crafts selections than visitors to other destinations. However, in rating value for money for arts and crafts, a slightly higher proportion of visitors to the Dempster/Inuvik area reported higher ratings than Eastern Arctic visitors; visitors to the South Mackenzie reported significantly lower ratings for value for money.

Using the percentage of parties who responded to the question as an indicator of use, Eastern Arctic visitors used campgrounds much less than other visitors (20% responding to questions on campgrounds); visitor centres were visited by at least half of visitors in all areas. Campgrounds in Areas 1 and 2 received very high ratings for enjoyment; the percentage of people who rated campgrounds in these Areas as very poor was extremely low. In contrast, a significant number of visitors to the Eastern Arctic rated campgrounds as very poor (15%).

Taking into account the ratings of attractions and services - and the expenditure implications - with respect to arts and crafts and tours, there appears to be some room for development in these areas. First, ratings for arts and crafts, for both selection and value for money, scored relatively low for the South Mackenzie Area. Also taking into consideration the propensity of visitors to this Area to spend in the lowest range with the highest frequency, there appears to be a pool of unsatisfied demand in the lower-end arts and crafts market. Second, visitors to the Eastern Arctic reported community tours as the most frequent activity undertaken, but rated tour selection as poor with a much higher frequency than did the majority of visitors to the other two Areas. This again may reflect unsatisfied demand.

Table 17 Visitor Rating of Services: All Visitors (weighted)

	RATING SCALE										RESPONDENTS	
	Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties	% of Total
	Rating of 1						Rating of 5					
Accommodation: Service	512	2.4%	1,527	7.2%	6,350	29.9%	6,716	31.6%	6,159	29.0%	21,264	62.9%
Accommodation: Value for Money	2,203	10.0%	4,702	21.4%	6,629	30.1%	5,278	24.0%	3,208	14.6%	22,020	65.1%
Roads and Highways	2,105	7.5%	4,714	16.8%	9,627	34.2%	8,175	29.1%	3,499	12.4%	28,120	83.2%
Airports	348	1.9%	650	3.5%	3,869	20.9%	8,699	47.0%	4,934	26.7%	18,500	54.7%
Service Stations: Service	495	2.3%	1,760	8.2%	7,053	33.0%	8,244	38.6%	3,792	17.8%	21,344	63.1%
Crafts/Art: Selection	434	2.0%	1,293	6.0%	4,579	21.1%	8,055	37.1%	7,364	33.9%	21,725	64.3%
Crafts/Art: Value for Money	1,238	5.9%	2,841	13.5%	7,032	33.5%	6,646	31.7%	3,219	15.3%	20,976	62.0%
Restaurants: Service	701	2.7%	1,759	6.8%	8,429	32.8%	10,204	39.7%	4,605	17.9%	25,698	76.0%
Restaurants: Value for Money	1,793	7.1%	4,487	17.8%	9,671	38.4%	6,831	27.1%	2,384	9.5%	25,166	74.4%
Other Shopping	919	5.0%	2,188	11.8%	6,967	37.6%	6,564	35.5%	1,877	10.1%	18,515	54.8%
Other Tours: Selection	754	9.4%	986	12.3%	1,547	19.3%	3,100	38.6%	1,634	20.4%	8,021	23.7%
Campgrounds: Enjoyment	372	2.3%	767	4.8%	3,537	22.2%	5,014	31.4%	6,254	39.2%	15,944	47.2%
Visitor Centers: Service	508	2.5%	915	4.6%	2,628	13.1%	5,270	26.3%	10,714	53.5%	20,035	59.3%

Table 18 Visitor Rating of Services: Dempster/Inuvik (weighted)

AREA 1		RATING SCALE								RESPONDENTS		
		Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties
		Rating of 1	Rating of 2	Rating of 3	Rating of 4	Rating of 5	Rating of 5	Rating of 5	Rating of 5			
Accommodation: Service	98	2.1%	274	5.7%	1,194	25.0%	1,847	38.7%	1,355	28.4%	4,768	75.3%
Accommodation: Value for Money	335	7.3%	698	15.3%	1,504	33.0%	1,262	27.7%	764	16.7%	4,563	72.1%
Roads and Highways	344	6.8%	638	12.6%	1,660	32.8%	1,852	36.6%	568	11.2%	5,062	80.0%
Airports	8	0.3%	160	5.4%	474	15.9%	1,189	39.9%	1,147	38.5%	2,978	47.1%
Service Stations: Service	131	3.2%	470	11.3%	1,293	31.2%	1,596	38.5%	659	15.9%	4,149	65.6%
Crafts/Art: Selection	78	1.8%	368	8.5%	1,018	23.6%	1,654	38.4%	1,191	27.6%	4,309	68.1%
Crafts/Art: Value for Money	286	6.7%	539	12.7%	1,197	28.2%	1,573	37.1%	644	15.2%	4,239	67.0%
Restaurants: Service	131	2.8%	311	6.6%	1,259	26.9%	1,863	39.7%	1,125	24.0%	4,689	74.1%
Restaurants: Value for Money	212	4.7%	629	14.0%	1,696	37.8%	1,376	30.6%	579	12.9%	4,492	71.0%
Other Shopping	122	3.7%	498	14.9%	1,200	35.9%	1,147	34.4%	372	11.1%	3,339	52.8%
Other Tours: Selection	49	2.3%	168	8.0%	335	15.9%	923	43.7%	636	30.1%	2,111	33.4%
Campgrounds: Enjoyment	20	0.6%	237	6.6%	785	21.9%	1,145	31.9%	1,403	39.1%	3,590	56.7%
Visitor Centers: Service	37	0.9%	168	4.2%	683	17.0%	1,226	30.4%	1,913	47.5%	4,027	63.6%

Table 19 Visitor Rating of Services: South Mackenzie (weighted)

AREA 2		RATING SCALE								RESPONDENTS		
		Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties
		Rating of 1	Rating of 2	Rating of 3	Rating of 4	Rating of 5	Rating of 5	Rating of 5	Rating of 5			
Accommodation: Service	385	2.8%	1,080	7.9%	4,391	32.0%	3,786	27.6%	4,073	29.7%	13,715	57.4%
Accommodation: Value for Money	1,312	8.8%	3,498	23.6%	4,303	29.0%	3,478	23.5%	2,236	15.1%	14,827	62.1%
Roads and Highways	1,275	6.3%	3,192	15.8%	7,068	34.9%	5,890	29.1%	2,825	14.0%	20,250	84.7%
Airports	253	2.1%	227	1.9%	2,571	21.4%	5,982	49.7%	3,000	24.9%	12,033	50.4%
Service Stations: Service	173	1.1%	1,160	7.1%	5,576	34.0%	6,508	39.7%	2,986	18.2%	16,403	68.6%
Crafts/Art: Selection	282	1.9%	723	5.0%	3,193	22.0%	5,501	37.9%	4,810	33.2%	14,509	60.7%
Crafts/Art: Value for Money	611	4.4%	1,955	14.1%	5,170	37.2%	4,162	29.9%	2,011	14.5%	13,909	58.2%
Restaurants: Service	456	2.5%	1,265	6.9%	6,392	34.9%	7,353	40.1%	2,866	15.6%	18,332	76.7%
Restaurants: Value for Money	1,099	6.1%	3,326	18.5%	7,096	39.4%	4,897	27.2%	1,598	8.9%	18,016	75.4%
Other Shopping	481	3.7%	1,411	10.8%	5,021	38.4%	4,850	37.1%	1,324	10.1%	13,087	54.8%
Other Tours: Selection	501	9.8%	701	13.8%	1,027	20.2%	1,939	38.1%	925	18.2%	5,093	21.3%
Campgrounds: Enjoyment	216	1.9%	457	4.0%	2,586	22.6%	3,619	31.6%	4,589	40.0%	11,467	48.0%
Visitor Centers: Service	369	2.6%	598	4.3%	1,790	12.8%	3,494	24.9%	7,772	55.4%	14,023	58.7%

Table 20 Visitor Rating of Services: Eastern Arctic (weighted)

AREA 3		RATING SCALE								RESPONDENTS		
		Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties
		Rating of 1	Rating of 2	Rating of 3	Rating of 4	Rating of 5	Rating of 5	Rating of 5	Rating of 5			
Accommodation: Service	29	1.0%	173	6.2%	764	27.5%	1,083	39.0%	731	26.3%	2,780	77.5%
Accommodation: Value for Money	557	21.2%	506	19.2%	821	31.2%	537	20.4%	208	7.9%	2,629	73.3%
Roads and Highways	486	17.3%	884	31.4%	900	32.0%	434	15.4%	107	3.8%	2,811	78.4%
Airports	87	2.5%	263	7.5%	824	23.6%	1,528	43.8%	787	22.6%	3,489	97.3%
Service Stations: Service	192	24.3%	129	16.3%	183	23.1%	140	17.7%	147	18.6%	791	22.1%
Crafts/Art: Selection	75	2.6%	202	6.9%	369	12.7%	899	30.9%	1,364	46.9%	2,909	81.1%
Crafts/Art: Value for Money	341	12.1%	347	12.3%	664	23.5%	911	32.2%	564	20.0%	2,827	78.9%
Restaurants: Service	114	4.3%	182	6.8%	778	29.1%	988	36.9%	615	23.0%	2,677	74.7%
Restaurants: Value for Money	482	18.1%	532	20.0%	879	33.1%	559	21.0%	207	7.8%	2,659	74.2%
Other Shopping	316	15.1%	279	13.4%	746	35.7%	566	27.1%	182	8.7%	2,089	58.3%
Other Tours: Selection	204	24.9%	117	14.3%	186	22.7%	238	29.1%	74	9.0%	819	22.8%
Campgrounds: Enjoyment	136	15.3%	73	8.2%	166	18.7%	250	28.2%	262	29.5%	887	24.7%
Visitor Centers: Service	102	5.1%	149	7.5%	155	7.8%	550	27.7%	1,030	51.9%	1,986	55.4%

Average Length of Stay

Visitors arriving by road tend to stay a shorter time in the NWT than visitors arriving by air (table 21). The overall average length of stay for air travellers was 16.7 days compared to 9.3 days for road travellers.

Table 21 Average Length of Stay (unweighted)⁵

		Avg. Length of Stay
A I R		17
R O A D		9
A R E A 1		16
A i r	Leisure	16
	Business	10
	Employment	NSD
		NSD
R o a d	Leisure	17
	Business	5
	Employment	NSD
		NSD
A R E A 2		12
A i r	Leisure	14
	Business	11
	Employment	9
		20
R o a d	Leisure	8
	Business	8
	Employment	NSD
		NSD
A R E A 3		21
A i r	Leisure	21
	Business	14
	Employment	11
		28

When Did Visitors Decide to Visit the Northwest Territories

Visitors were asked how long prior to their visit they made the decision to visit the Northwest Territories. The results from this question are presented in table 22. On average, a visitor to the NWT made the decision to visit about five and half months prior to travelling. This lag time between decision and travel was very similar for South Mackenzie and Eastern Arctic visitors. On average, visitors to the Dempster/Inuvik Area decided to travel a full month before visitors to the other two destinations.

⁵ NSD - Non-Sufficient Data - indicates that the sample size was too small to allow calculation of a mean with sufficient confidence

Table 22 Travel Decision Timing

	Average Lag Time (months)	Sample Size
Area 1	6.46	303
Area 2	5.14	905
Area 3	5.53	299
NWT	5.48	1,507

Visitor Expenditures

Visitor expenditures are presented in figures 5 to 8 for the NWT as whole, as well as by Area. These graphs show the proportion of visitor spending in a range of expenditure categories for a variety of items.

Visitors to the Eastern Arctic were much more likely to have higher expenditures for accommodation and restaurant meals than visitors to the Western Arctic. Eastern Arctic visitors were also most likely to spend more on arts and crafts and on getting to the NWT.

In all three Areas, getting to the NWT was the most expensive part of the trip for visitors. Visitors also reported package tours as high expenditure items, and gas, fuel or airfare while in the NWT.

A large proportion (greater than 50%) of all visitors reported spending less than \$100 on souvenirs and gifts. This holds true for clothing, equipment/vehicle rentals, groceries and recreation. Visitors to the Eastern Arctic reported the highest levels of spending of all visitors on arts, crafts, souvenirs and gifts.

Once in the NWT, a significant number of visitors to all Areas reported low expenditures on packaged tours. This is particularly true for the Eastern Arctic, where visitors were most likely to report the lowest expenditure category. However, where visitors did take package tours, the cost was very high compared to other items.

Figure 5 Frequency of Visitor Spending by Category, All NWT Visitors

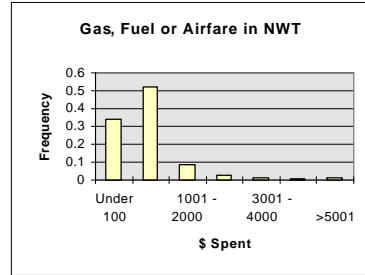
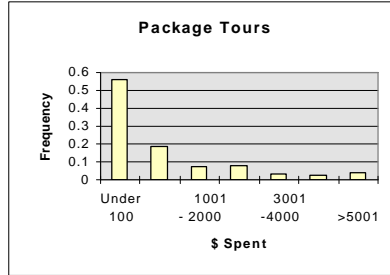
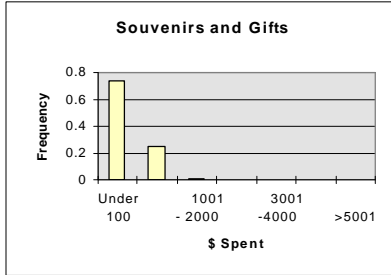
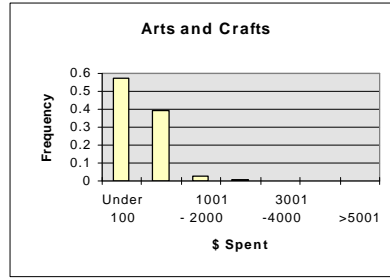
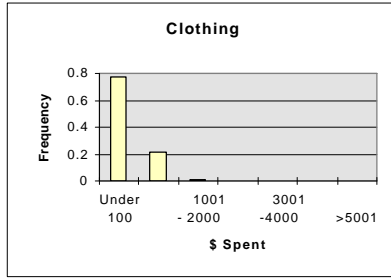
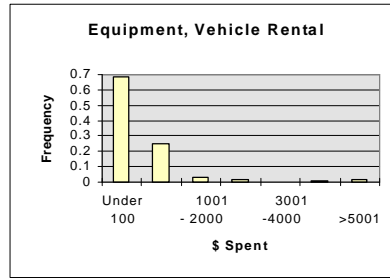
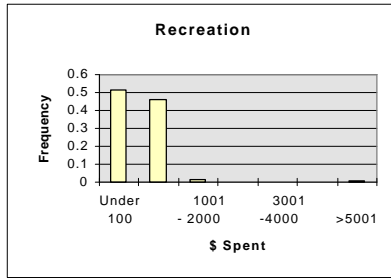
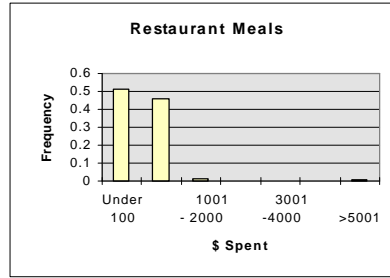
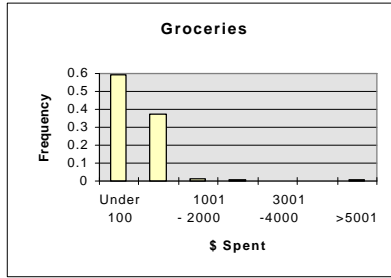
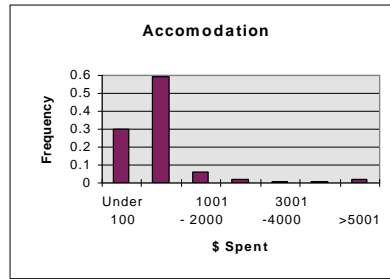
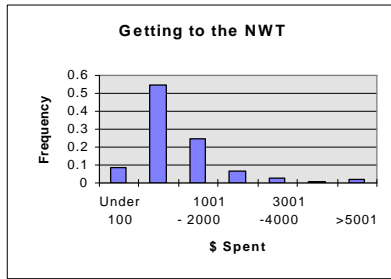


Figure 6 Frequency of Visitor Spending by Category, Dempster/Inuvik Visitors

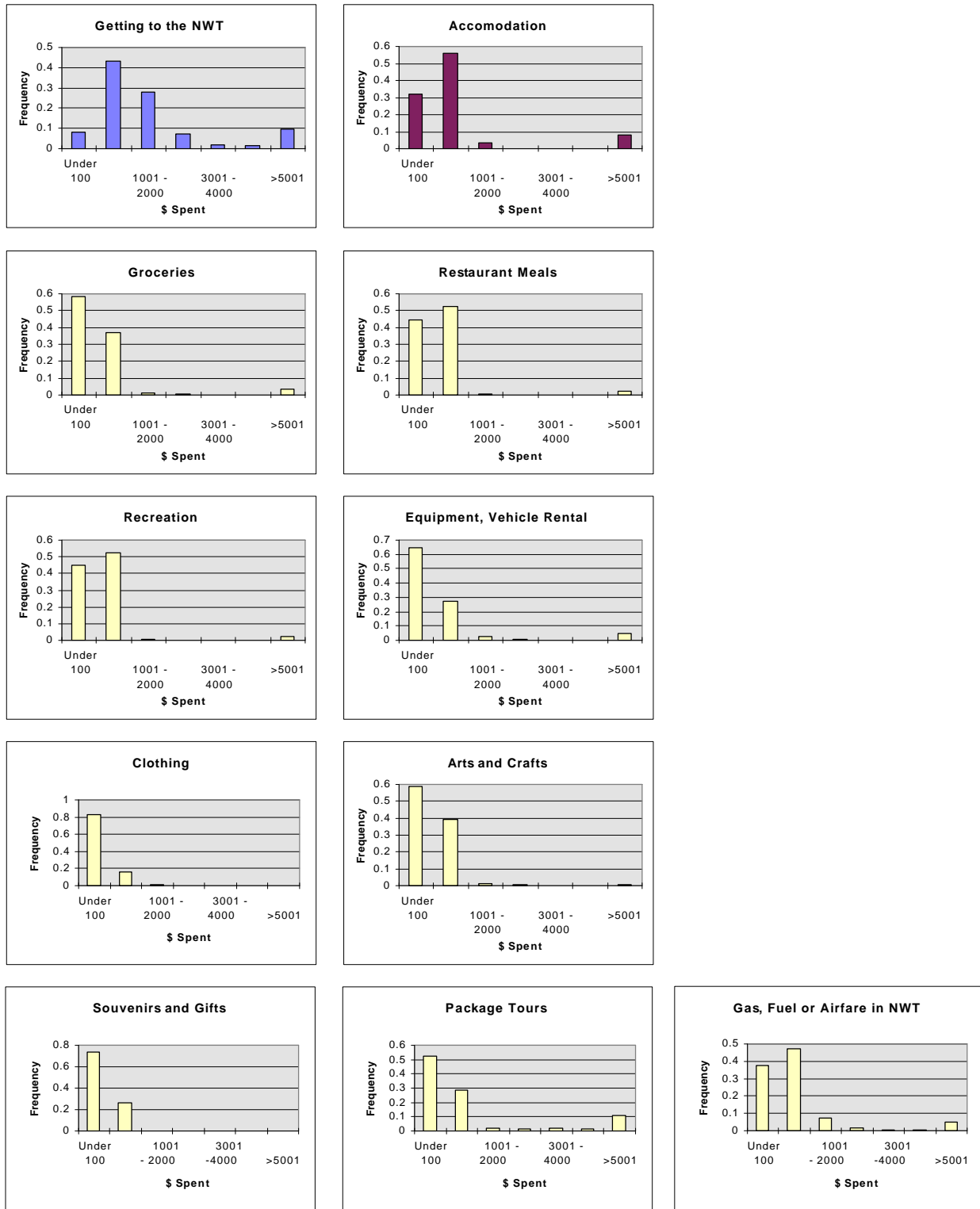


Figure 7 Frequency of Visitor Spending by Category, South Mackenzie Visitors

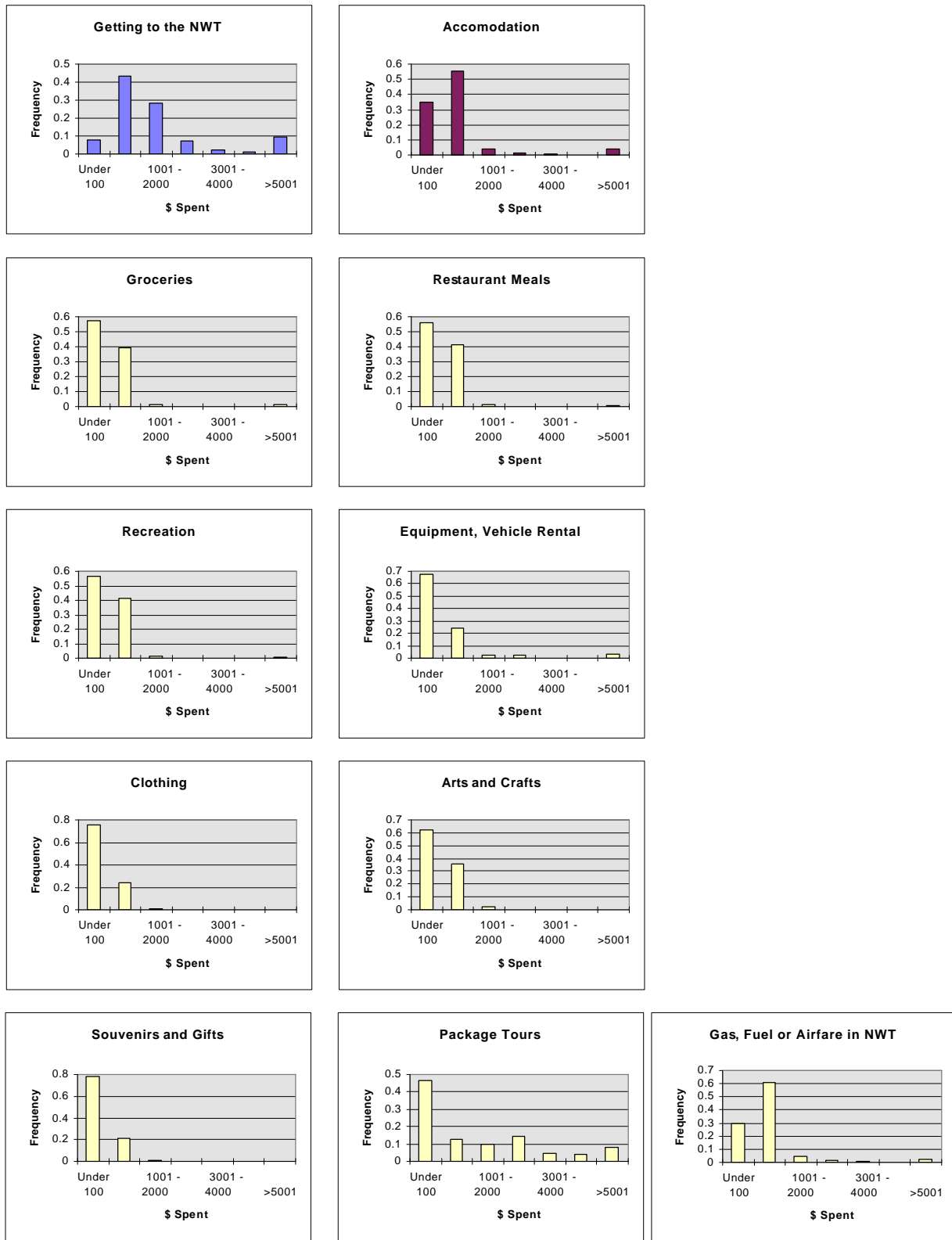
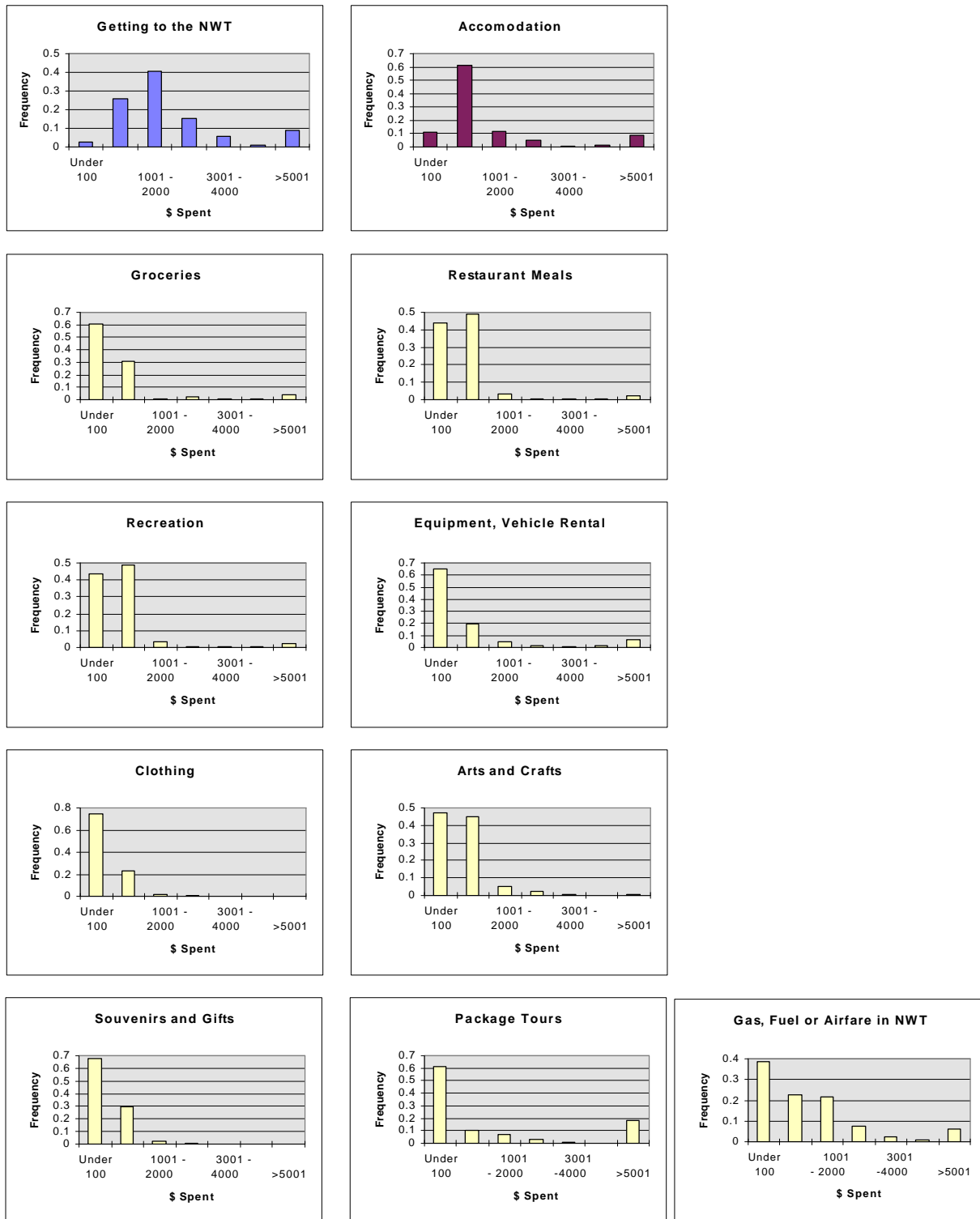


Figure 8 Frequency of Visitor Spending by Category, Eastern Arctic Visitors



Comparison with 1989 Survey

The following section compares the results of the 1989 exit⁶ survey with the results of the current survey. Because of differences in the way questions were structured, direct comparisons between some categories could not readily be made. However, some valid observations could be made on trends and general changes between the two survey years. Except for visitor numbers, we have used the data as presented in the 1989 report.

Number of Visitors

In order to compare visitor numbers between the 1989 and the 1994 surveys, two adjustments had to be made. First, since the 1989 survey ran two months longer than the 1994 survey - from the middle of May through to mid September - the data regarding visitor numbers for the 1994 survey had to be extrapolated to the longer May to September period. Second, our review of the methods used in the 1989 study revealed difficulties which had to be addressed in order to compare the two years. A complete description of the measures used to adjust the 1989 exit survey are found in Appendix B.

With these adjustments made, the comparison between years is summarized in the table below:

Table 23 Comparison of Visitor Numbers, 1989 and 1994

Area	1989			Area	1994		
	Road	Air	Total		Road	Air	Total
1	5,244	1,758	7,002	1	6,443	2,308	8,751
2	17,802	15,740	33,542	2	21,701	12,758	34,459
3	0	4,711	4,711	3	0	5,052	5,052
Total	23,047	22,209	45,256	Total	28,144	20,118	48,262

In comparing 1989 to 1994, there was significant decline in the number of air travellers to the South Mackenzie, but increases to both the Eastern Arctic and Inuvik. Road traffic increased by about 25% to the South Mackenzie, and the number of road travellers along the Dempster increased by almost 20%. The overall result is a net increase in the overall number of travellers between the two years of three thousand people, a six percent increase.

It should be noted that after adjustments were made to the weighting scheme used in the 1989 survey, the net estimate of visitors was re-calculated as 45,256, which is substantially different from the estimate of 55,651 provided in the original 1989 report. Further information can be found in Appendix B of this report.

⁶ Northwest Territories Visitors Survey, Summer 1989. Acres International Ltd., January 1990

Origin of Visitors

There has been almost no change in the pattern of visitor origin since 1989. The 1989 survey reported the total Canadian proportion of visitors at 78%, US at 15.1% and foreign at 6.9%. The 1994 survey found proportions of 77.7% Canadian, 15.1% US and 6.9% foreign. These are unweighted figures.

Of Canadian visitors, the top three provinces remain fairly similar in visitor proportions. In 1989, Albertans accounted for 37.2% of total visitation, Ontario residents 15.3%, and visitors from BC 10.6%; the 1994 study found these proportions to be, respectively: 36.6%, 10.6% and 12.8%. In 1994, BC occupies the position held by Ontario in 1989.

Visitor Destinations

The 1989 survey found that 15.3% of all visitors travelled to the Dempster/Inuvik Area, 73.5% travelled to the South Mackenzie, and the remainder, 11.2%, visited the Eastern Arctic. In 1994, these proportions are estimated at, respectively, 18.7%, 70.7%, and 10.6%. Visitation therefore appears to have shifted in favor of the Inuvik/Dempster Area.

Primary Purpose of Visit

In 1989, more visitors travelled to the Western Arctic for leisure than for business. The pattern is reversed for the Eastern Arctic. The same results were found in the 1994 survey.

Visitor Income

A higher proportion of visitors in 1989 reported lower income ranges than in 1994. In 1989, an estimated 44.8% of visitors reported incomes less than \$40,000; in the 1994, 30.9% reported incomes less than \$40,000. However, these figures are reported in nominal dollars and therefore do not account for the impact of inflation.

Visitor Expectations

Visitor satisfaction in terms of meeting expectations was very similar between the two study years. In 1989, 34.6% reported that their expectations were exceeded, 61.3% reported that their expectations were met, and 4.1% reported that their expectations were not met. In 1994, these proportions were, respectively: 37.5%, 58.4%, and 4.0%. Satisfaction levels appear to be slightly higher in 1994.

Activities

Visitor activities reported in the two surveys were recorded in different ways so that direct comparison is difficult. For instance, the 1989 study included visiting family and friends as an activity, while in the 1994 survey, this category was included in factors influencing the decision to travel.

With this said, some general comments can be made. In both years, outdoor activities such as fishing, hiking and canoeing were popular. Also, touring as a general category was a common activity. While family and friends were classified differently in each survey, the

response pattern was similar between years: visiting family and friends was important to visitors to the South Mackenzie and the Eastern Arctic, and much less important to travellers in the Dempster/Inuvik Area.

Factors Which Influenced Travel

As is the case with activities, the way the questions relating to travel influences were structured in the two surveys makes direct comparison difficult. However, general comments can be made. In both surveys “*word of mouth*” and family friends were indicated to be primary influencers and sources of information regarding travel to the Northwest Territories.

Attractions and Services

Again, question structure in the two surveys prevents a direct comparison of visitor opinions on attractions and services between the two years. However, two important observations can be made. First, there appears to be greater satisfaction with roads and campgrounds in 1994 when compared to 1989. Second, while satisfaction with accommodations has improved, concern with high prices was evident in both 1989 and 1994.

Average Length of Stay

In both 1989 and 1994, visitors travelling by air to the NWT tended to stay considerably longer in the NWT than visitors travelling by car. No statistically significant changes could be detected in length of stay between the two surveys.

When Did Visitors Decide to Visit the Northwest Territories

There appears to be a significant difference between 1989 and 1994 in the timing of the decision to travel. In 1989, at least half of the travellers made the decision to travel within four months of actually making the trip. In 1994, on average, travellers made the decision to travel five and half months prior to travelling. This difference could be explained by a travel market made more cautious by the recent recession.

Visitor Expenditures

In the 1989 survey, visitors were asked to provide an estimate of actual dollars spent, but in the 1994 survey, visitors were asked to estimate expenses within a pre-set range, so a comparison between the years can only comment on proportional expenses by category.

Visitors to the Eastern Arctic spent more on accommodation and transportation than other visitors in both years. Also in both years on average Eastern Arctic visitors spent more on arts, crafts and souvenirs.

In both survey years, the cost of getting to the NWT accounted for the largest expense.

Discussion

Alberta, British Columbia/Yukon, Ontario and regions of the United States represent the largest visitor markets for the Northwest Territories. Any factors which influence travel from these destinations will have a significant impact on visitation to the NWT and in particular impact on areas which receive a large proportion of visitors from any of these markets.

Proximity to the various regions of the NWT has a major influence as to which region of the NWT a traveller will visit. Provinces which border destination areas are major contributors of visitors. The proximity of the Alaska Highway to the Inuvik area is a major factor influencing the relatively high proportion of US visitors to that area. Similarly, since a large proportion of US visitors travel by road, low US visitation to the Eastern Arctic may be explained in part by absence of road access.

In the Eastern Arctic, the proportion of business travellers is much larger than leisure travellers. Because of its size relative to the leisure market, business travellers may represent an under exploited market for the east. Business travellers may be persuaded to expand their stay to pursue leisure activities.

US travellers primarily visit the NWT by road. This pattern of travel has implications for the provision of services such as campgrounds, and offers opportunities to increase sales of arts and crafts. The availability of good road services is particularly important in light of the importance of “*word of mouth*” and “*visiting friends and relatives*” as factors influencing the decision to travel to the NWT.

Visitors to the NWT overwhelmingly felt that their trip had met or exceeded their expectations, indicating a high level of satisfaction. Visitors to the NWT appreciate wildlife, wilderness and outdoor activities. Campgrounds on the road system received excellent ratings; Eastern Arctic visitors were less enthusiastic about campgrounds. However, visitors to the Eastern Arctic were much more likely to believe that their overall trip surpassed what they had been expecting.

In general, visitors to all areas felt that while accommodation and restaurant service was good, the cost was high. It was more expensive for visitors from the Eastern Arctic to get to their destination, and once there, they spent more on accommodation and food than visitors to the Western Arctic. The greater expense associated with Eastern Arctic visits is likely a function of higher overall transportation costs (exclusively air travel to the East versus road and air travel to the West) and the generally higher cost of living in the East.

Very low reported spending on package tours by visitors overall once in the NWT suggests that people did not purchase many packaged tours outside of any already included in the price of their trip. This pattern was especially pronounced for the Eastern Arctic, where very low spending on tours may be correlated with a large proportion of very poor ratings attributed to the selection of tours available. In contrast, visitors to the other two areas

reported a higher level of satisfaction with the selection of tours and also reported higher levels of spending on these tours.

Overall, patterns of origin remain the same between 1989 and 1994. Proximity to the destination remains a very important factor influencing the traveller's destination. Also common to both survey years was the primary importance of friends and family as a reason to visit the NWT in all areas except the Dempster Highway.

Visitor expenditure patterns have remained relatively the same, with Eastern Arctic visitors spending more than Western Arctic visitors.

In 1994, approximately 3,000 more visitors travelled to the NWT than in 1989. This increase is consistent with travel indicators for the provinces and US states which are important visitor markets for the NWT. This increase was not consistent across the NWT. The largest gain has been in road traffic along the Dempster Highway and in the South Mackenzie. This increase is probably due to the economic recovery in the United States and Alberta, and the positive influence of road and campground improvements in the Western Arctic combined with the presence of the visitor centre in Dawson City.

Satisfaction with campgrounds and roads appears to have improved since 1989. This improvement in satisfaction may have contributed to increased travel up the Dempster Highway. The importance of "*word of mouth*" as a travel influence for visitors to this area lends support to the idea that road and campground improvements may have contributed to increased visitor traffic. The 1994 survey results indicate that on average, visitors to the Dempster/Inuvik Area made the decision to travel to the NWT almost a full month before visitors to other regions. It is possible that these visitors decided to visit the Dempster the year following a trip along the Alaska Highway (this would explain the longer average decision making lag). The visitor centre in Dawson City may have played an important role in influencing some of these travellers, where travellers in the Dempster Area reported higher than average satisfaction with visitor centre service.

There was a slight increase in visitor numbers observed between 1989 and 1994. However, while the increase is slight, it may signify an upward trend in indicators, especially air traffic, beginning in 1992⁷. Between 1989 and 1992, the number of air travellers declined by over 20%. Indicators for ferry traffic generally show an increasing trend since 1989. We expect that this upward trend will continue to pace economic recovery in the US and Canada.

⁷ Since our 1994 estimate for visitor numbers is a preliminary estimate, we cannot state with complete confidence that an upward trend is actually real.

Recommendations

1. In terms of product development, there appears to be unfilled demand for a greater number and variety of tours, particularly in the Eastern Arctic.
2. With the proximity of the Alaska Highway to the Dempster Highway, visitor centres such as the one in Dawson City, which can divert travellers toward Inuvik, may prove to be worthwhile investments. The centre in Dawson City may be an important factor in the increased traffic observed on the Dempster Highway since 1989. Other locations, similar to Dawson City, such as Fort Nelson (to direct traffic onto the Liard Highway) should be considered for future centres,⁸ particularly as British Columbia appears to have surpassed Ontario in gross visitation.
3. Promotional efforts aimed at traffic travelling to Alaska may also reap benefits in terms of increased visitation. Similarly, given the large proportion of Canadian visitors to the NWT, promotional efforts should be considered for those provinces that are major travel markets for the various regional destinations.
4. The investment in the print media campaign should be re-examined given the indications that magazine articles about the NWT have a much larger impact on travel intentions than advertisements.
5. Work should proceed on a model to predict future visitation to the NWT based on changes in key variables in the economies of regions which are important visitor markets for the NWT. The model can build on the survey work completed to date, and could be a valuable tool for tourism planning for the Northwest Territories. Such a model can account for influences on travel such as the recent diamond exploration in the NWT and other variables not normally associated with visitation.

⁸ Benefit/cost analysis of visitor centres can be obtained from Policy and Planning, ED&T

Critique

1. The next Exit Survey should be extended to include the months of May and June to provide a larger, more representative sample of visitors travelling during the peak season.
2. The 1994 Exit Survey was able to provide general information about visitor activities, destinations and spending patterns. The next exit survey should try to obtain more specific information in these areas. In particular, more detailed information about the influencers that help a visitor choose a destination, specific spending information and finally, requesting respondents to prioritize some of their activities. It would also be helpful to get a determination of the age of the respondents.
3. The extrapolations that were conducted to determine the total number of resident and non-resident travellers were based, in part, on 1993 figures provided to the department by the aviation division of Statistics Canada and the transportation planning division of the GNWT Department of Transportation. The information provided by these two agencies was the most up-to-date information available at the time. The department should continue to lobby Statistics Canada to develop methods which provide more timely airline information as well as work with the department of Transportation as they begin to upgrade their data collection equipment on NWT highways.

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Northwest Territories Aurora Borealis Tour - Survey Results 1993. Department of Economic Development and Tourism, Policy, Planning and Human Resources Division, January 1995.

Northwest Territories Highway Traffic Report, 1993. Department of Transportation, GNWT, September 1994.

Northwest Territories Visitor Survey, Summer 1989. Acres International Ltd., January 1990.

Appendix A

Sample Survey Form



Travel 94 - Exit Survey

Instructions to the Surveyor:
 Refer to your "Field Guide" or Regional Tourism Officer for more detailed explanations; questions to be asked are bolded. Complete the following section before starting the interview.

SECTION I - COMPLETE BEFORE INTERVIEWING THE CLIENT

Surveyor's Initial: <input type="text"/>	Survey Date: <input type="text"/>	Survey Location: <input type="text"/>	If Airport, Flight Number: <input type="text"/>
If Highway, Type of Vehicle:			
Car or Pickup <input type="checkbox"/>	R.V. or Camper <input type="checkbox"/>	Tour Bus <input type="checkbox"/>	Transp. Truck <input type="checkbox"/>
Sched. Bus <input type="checkbox"/>		Other <input type="checkbox"/>	

SECTION II - BEGIN INTERVIEW

Hello, I am an employee of the Government of the NWT. You have been randomly selected as a respondent for the Travel '94 Exit Survey. Although the survey is voluntary, your participation is important if the results of the survey are to be accurate. Also, you should be aware that all answers will be kept confidential.

1. Before starting, I'd like to ask if you have already been surveyed in the NWT? (Yes or No)

Yes No

2. Would you mind spending 5 to 10 minutes to summarize your views on traveling in the NWT? (Yes or No)

Yes No

If Yes, end the interview. Thank you.

3. Thank you for participating. I would like to start by asking where you live?

City/Town/Community

State/Province (or country if not Canadian or US address)

4. Where are you traveling to?

City/Town/Community

State/Province (or country if not Canadian or US address)

**If an NWT resident traveling to another destination in the NWT go to question 8.
 If an NWT resident traveling outside the NWT go to question 15.**

5. What NWT community was your primary destination?

Community

6. Approximately how long have you been traveling in the NWT?

Days/Weeks

7. When did you decide to travel to the NWT?

Month/Year

8. How many people are in your travel party?

People

9. How would you best describe the purpose of your trip to the NWT, business, employment or leisure? (check one)

If leisure, was it a ?	If on business, was it to ?	If employment, were you on ?
<input type="checkbox"/> Holiday/Vacation	<input type="checkbox"/> Look at new markets	<input type="checkbox"/> Work/Duty Travel
<input type="checkbox"/> Visit friends or relatives	<input type="checkbox"/> Attend a conference	<input type="checkbox"/> Education/Training
<input type="checkbox"/> Attend sporting event	<input type="checkbox"/> Complete a contract	<input type="checkbox"/> Interview/Job search
<input type="checkbox"/> Attend community event	<input type="checkbox"/> Management concern	<input type="checkbox"/> Other - Specify
<input type="checkbox"/> Cultural event	<input type="checkbox"/> Client/Customer Meeting	
<input type="checkbox"/> Outdoor recreation	<input type="checkbox"/> Other - Specify	
<input type="checkbox"/> Other - Specify		
<input type="text"/>	<input type="text"/>	<input type="text"/>
↓ Go to question 10	↓ Go to question 12	↓ Go to question 12

10. What influenced your decision to visit the NWT? (check more than 1 if necessary)

<input type="checkbox"/> Magazine Article	<input type="checkbox"/> NWT "1-800" Phone Service	<input type="checkbox"/> See the Arctic or Arctic Ocean
<input type="checkbox"/> Magazine Advertisement	<input type="checkbox"/> Friends or Relatives	<input type="checkbox"/> NWT Explorers' Guide
<input type="checkbox"/> Other Advertisement	<input type="checkbox"/> Lived Here Before	<input type="checkbox"/> Word of Mouth
<input type="checkbox"/> Travel Agent	<input type="checkbox"/> It's on the Map	<input type="checkbox"/> Other - Specify
		<input type="text"/>

11. Overall, did your visit to the NWT:

Exceed your expectations
 Meet Expectations
 Not meet expectations

12. Would you recommend a vacation in the NWT to your friends or relatives? (Yes or No)

Yes No

Why?

13. Did you take any recreational tours, yes or no?

Yes No

14. What tours did you take?

<input type="checkbox"/> Community Tour	<input type="checkbox"/> Naturalist	<input type="checkbox"/> Historical
<input type="checkbox"/> Photography	<input type="checkbox"/> Hiking	<input type="checkbox"/> Cultural
<input type="checkbox"/> Fishing Trip	<input type="checkbox"/> Canoeing/Boating	<input type="checkbox"/> Other-Specify

SECTION III - RATING NWT ATTRACTIONS AND SERVICES

15. How would you rate the following attractions on a scale of 1 to 5, where 5 is excellent and 1 is very poor? (If the service is not applicable check the N/A box)

		Excellent					Very Poor	N/A
1.	Observing wildlife/nature	5	4	3	2	1		
2.	Hiking, sightseeing, camping	5	4	3	2	1		
3.	Native culture	5	4	3	2	1		
4.	Community events	5	4	3	2	1		
5.	Water sports (boating, etc.)	5	4	3	2	1		
6.	National parks	5	4	3	2	1		
7.	Camping	5	4	3	2	1		
8.	Fishing	5	4	3	2	1		
9.	Hunting	5	4	3	2	1		
10.	Nightlife/Entertainment	5	4	3	2	1		
11.	Geography (e.g. Waterfalls)	5	4	3	2	1		
12.	Points of interest	5	4	3	2	1		
13.	Other <input type="text"/>	5	4	3	2	1		

16. How would you rate the following services on a scale of 1 to 5, where 5 is excellent and 1 is very poor? (If the service is not applicable check the N/A box)

		Excellent					Very Poor	N/A
1.	Accommodation - Service	5	4	3	2	1		
2.	Accommodation - Value for money	5	4	3	2	1		
3.	Roads or highways	5	4	3	2	1		
4.	Airports	5	4	3	2	1		
5.	Service stations - Service	5	4	3	2	1		
6.	Crafts/Art - Selection	5	4	3	2	1		
7.	Crafts/Art - Value for Money	5	4	3	2	1		
8.	Restaurants - Service	5	4	3	2	1		
9.	Restaurants - Value for Money	5	4	3	2	1		
10.	Other shopping	5	4	3	2	1		
11.	Other tours - Selection	5	4	3	2	1		
12.	Campgrounds - Enjoyment	5	4	3	2	1		
13.	Visitor centers - Service	5	4	3	2	1		

SECTION IV- ESTIMATING EXPENDITURES

17. What were your approximate expenditures in the NWT? (Where possible, enter the specific amount, otherwise check the appropriate box).

	Under \$100	\$100 \$1,000	\$1,001 \$2,000	\$2,001 \$3,000	\$3,001 \$4,000	\$4,001 \$5,000	Over \$5,000
1. Getting to the NWT							
2. Accommodation							
3. Groceries							
4. Restaurant Meals							
5. Recreation (i.e. Day Tour)							
6. Equipment/Vehicle rentals							
7. Clothing							
8. Arts and Crafts							
9. Souvenirs and Gifts							
10. Package Tour (Inclusive)							
11. Gas, Fuel or Airfare in the NWT							
12. Other _____							

SECTION V- OPTIONAL MARKETING QUESTIONS

18. Would you answer a few marketing questions about your income and employment? (yes or no)

Yes

No

Go to question 19

Go to question 21

19. Which of the following income categories includes your family income?

Under \$20,000

\$21,000 to \$40,000

\$41,000 to \$60,000

\$61,000-\$80,000

More than \$81,000

20. Are you?

Employed

Self Employed

Professional

Student

Retired

Other

SECTION VI- CONCLUSION AND END OF INTERVIEW

21. Could you summarize the highlights of your visit or any general concerns? (yes or no)

If yes, what are they?

Thank the person for spending the time necessary to complete this questionnaire.

Appendix B

Comparisons Between the 1994 and 1989 Exit Surveys

Direct comparison of the two exit surveys proved difficult due to two specific circumstances:

1. the survey periods were different; and
2. difficulties were discovered with the 1989 survey methodology.⁹

Survey Periods

The matter of differing survey periods was easily rectified by extrapolating the 1994 data over the longer (May to September) survey period.

For air travellers, total flights (*a*) per survey location was increased to cover a longer period of 16 weeks, as opposed to 12. Passenger counts on flights met (*p*) was also adjusted. This adjustment involved adding the appropriate proportion of second quarter airline carriage (for the period May 15 - June 30) to the existing third quarter carriage (which covers the period July 1 - September 30).

For road travellers, the extrapolation involved adjusting non-resident cars met (*m*) to represent the longer survey period. These figures were easily obtained, as all non-resident, light vehicle traffic is counted at each of the ferry crossings over the summer operating period. The traffic adjustment for the Enterprise survey location was incremented using the highway traffic data collected by the Department of Transportation.¹⁰

Methodology

The methodological difficulties were overcome by re-weighting the gross traffic estimates using methods and figures which were regarded as more appropriate. Three differences are of specific concern:

- the weighting formula for road travellers described in the Acres International study (page 2-3) was not the weighting formula actually employed;
- the Acres International study chose to weight the sum of the expected vehicles, for the four survey locations by the average travel party size, as opposed to weighting each survey location and then summing; and

⁹ *Northwest Territories Visitors Survey, Summer 1989*. Acres International Ltd., January 1990

¹⁰ *Northwest Territories Highway Traffic, 1993*. Department of Transportation, GNWT, September 1994

- the estimate of non-resident traffic at the 60th parallel survey location in the 1989 exit survey is in error, and is reflective of double counting between this survey location and the Ft. Providence location.

The weighting formula actually employed in the Acres International study was:

$$(4) \quad \frac{t}{s}$$

where: $t =$ total non-resident cars
 $s =$ cars surveyed

This formulation does not match the one provided in the Acres' methodology. Equation (4) above is the correct formulation for weighting-up of vehicle traffic when the population of non-resident vehicles is known (i.e., at the three ferry crossing survey locations). However, when the population is not known, as at the 60th parallel or Enterprise survey locations, the more elaborate formulation provided in equation (2) is required.

The second difference arises in the procedure of weighting-up by the average party size (*aps*) used in the Acres International study.

$$(5) \quad \sum_1^4 (ET_i) \times (aps)$$

where: $ET_i =$ Expected Travellers ($i= 1$ to 4 : Ft. Providence, Ft. Simpson, Ft. McPherson, 60th Parallel)
 $aps =$ average party size

This formulation establishes weights for each survey location by the number of parties. The weighting scheme used for the 1994 exit survey applies the average party size weighting directly in the formula, therefore establishing weights by the number of travellers.

Finally, the traffic estimate for the 60th parallel location, in comparison to the available data, is determined to be a gross over-estimation. Permanent road counter data, 60th parallel visitor centre attendance logs and proxy traffic measures (i.e., ferry crossing data from Ft. Providence and Liard) indicate that the stated figure in the 1989 study is an over-estimation. Taking the available data under consideration, and ensuring to as great an extent as possible that double counting is avoided, the estimated number of travel parties at the 60th parallel crossing is 2,304; representing 6,451 individuals.

Having made the adjustments to extrapolate the 1994 data to fit the longer survey period, and having adjusted the 60th parallel crossing data to eliminate double counting and reflect an acceptable figure, the two surveys now share enough commonality to warrant an

acceptable comparison. The result of the re-working of the 1989 study is that total non-resident visitation is re-estimated to be 45,256, and not 55,664.¹¹ The 1994 exit survey, extrapolated to the longer survey period, estimates total non-resident visitation as 48,262. A 6.6% increase in non-resident travel to the Northwest Territories is noted between 1989 and 1994.

The tables on the following pages compare the different weighting schemes used in 1989 and 1994, and show how data from the two years was modified so it could be compared.

¹¹ *Northwest Territories Visitors Survey, Summer 1989*. Acres International Ltd., January 1990, page 3-15

Un-Modified 1989 Exit Survey Weighting ResultsAir Passengers

	<u>Cambridge</u>	<u>Ft. Smith</u>	<u>Hay River</u>	<u>Inuvik</u>	<u>Iqaluit</u>	<u>Norman Wells</u>	<u>Rankin I</u>	<u>YK</u>	<u>TOTAL</u>
Total Flights (a)	72	90	108	180	306	104	336	720	1,916
Flights met (b)	69	70	58	101	89	42	58	178	665
Visitors (v)	433	531	463	690	377	369	71	2067	5,001
Residents (r)	739	753	565	1189	531	699	259	2371	7,106
Passenger counts on flights met (j)	1309	1465	1408	2686	2473	1243	542	6750	17,876
Visitors surveyed (s)	354	374	387	465	440	263	95	1010	3,388
Weighting factor	1.426	2.083	3.051	3.780	8.023	4.043	7.111	12.591	
Expected Travellers	505	779	1,181	1,758	3,530	1,063	676	12,717	22,209

Vehicle Passengers

	<u>Ft. Prov</u>	<u>Fort Simp</u>	<u>Fort McF</u>	<u>60th Par</u>	<u>TOTAL</u>
Non-resident cars met (m)	539	163	485	817	2,004
Cars surveyed (s)	241	120	229	112	702
Total cars (t)	3339	715	1873	6003	11,930
Resident cars (r)	1295	398	164	119	1,976
Weighting Factor (t/s)	13.855	5.958	8.179	53.598	
Expected Travellers	3,339	715	1,873	6,003	(11,930*2.80)= 33,404

Total Travellers (Air and Road)**55,613**

Fully Modified 1989 Exit Survey Weighting ResultsAir Passengers

	<u>Cambridge</u>	<u>Ft. Smith</u>	<u>Hay River</u>	<u>Inuvik</u>	<u>Iqaluit</u>	<u>Norman Wells</u>	<u>Rankin I</u>	<u>YK</u>	<u>TOTAL</u>
Total Flights (a)	72	90	108	180	306	104	336	720	1,916
Flights met (b)	69	70	58	101	89	42	58	178	665
Visitors (v)	433	531	463	690	377	369	71	2067	5,001
Residents (r)	739	753	565	1189	531	699	259	2371	7,106
Passenger counts on flights met (j)	1309	1465	1408	2686	2473	1243	542	6750	17,876
Visitors surveyed (s)	146	184	160	230	206	114	34	525	1,599
Weighting factor	3.456	4.233	7.380	7.643	17.137	9.328	19.869	24.222	
Expected Travellers	505	779	1,181	1,758	3,530	1,063	676	12,717	22,209

Vehicle Passengers

	<u>Ft. Prov</u>	<u>Fort Simp</u>	<u>Fort McF</u>	<u>60th Par</u>		<u>TOTAL</u>
Non-resident cars met (m)	539	163	485	817		2,004
Cars surveyed (s)	241	120	229	112		702
Total cars (t)	3339	715	1873	2304		8,231
Resident cars (r)	1295	398	164	119		1,976
Average party size					2.8	
Weighting Factor (t/s)*aps	38.79	16.68	22.90	57.60		
Expected Travellers	9,349	2,002	5,244	6,451		23,047

Total Travellers (Air and Road)**45,256**

Weighting for 1994 Exit Survey: July - September**Air Passengers**

	Cambridge Bay	Fort Smith	Hay River	Inuvik	Iqaluit	Ft. Simpson	Rankin Inlet	Yellowknife	Total
Total Flights (a)	108	156	348	192	624	180	228	900	2,736
Flights met (b)	78	33	79	83	138	71	65	223	770
Visitors (v)	196	19	258	937	490	53	130	165	2,248
Residents (r)	243	22	67	782	438	43	93	181	1,869
Passenger counts on flights met (p)	438	262	300	1299	1018	141	432	3755	7,646
Visitors surveyed (s)	168	41	133	202	244	183	112	398	1,481
Weighting factor	1.611	14.016	7.895	8.106	9.959	1.081	7.889	18.161	
Expected Travellers	271	575	1050	1637	2430	198	884	7228	14,272

Vehicle Passengers

	Ft. Providence	Liard	Peel River	Enterprise	Total
Non-resident cars met (m)	2169	1022	1569	1773	6,533
Cars surveyed (s)	478	32	229	74	813
Total cars (t)	8321	3242	3796	6800	22,158
Resident cars (r)	6152	2220	2227	5027	15,625
Average Party Size (aps)				2.99	
Weighting Factor	13.57	95.49	20.49	71.64	
(t/s)*(m/(m+r))*aps					
Expected Travellers	6485	3056	4691	5301	19,534

Total Travellers (Air and Road)**33,806**

Weighting for 1994 Exit Survey, Expanded to May -Sept Season**Air Passengers**

	Cambridge Bay	Fort Smith	Hay River	Inuvik	Iqaluit	Ft. Simpson	Rankin Inlet	Yellowknife	Total
Total Flights (a)	144	208	464	256	832	228	304	1200	3,636
Flights met (b)	78	33	79	83	138	71	65	223	770
Visitors (v)	196	19	258	937	490	53	130	165	2,248
Residents (r)	243	22	67	782	438	43	93	181	1,869
Passenger counts on flights met (p)	463	277	318	1373	1076	157	457	3970	8,091
Visitors surveyed (s)	168	41	133	202	244	183	112	398	1,481
Total Passengers	855	1,748	1,865	4,234	6,487	505	2,136	21,364	39,194
Average Passenger Count	5.94	8.40	4.02	16.54	7.80	2.21	7.03	17.80	
Weighting factor	2.272	19.757	11.132	11.425	14.038	1.524	11.118	25.598	
Expected Travellers	382	810	1481	2308	3425	279	1245	10188	20,117

Vehicle Passengers

	Ft. Providence	Liard	Peel River	Enterprise	Total
Non-resident cars met (m)	3390	1506	2155	2362	9,413
Cars surveyed (s)	478	32	229	74	813
Total cars (t)	8321	3242	3796	9060	24,418
Resident cars (r)	4931	1736	1641	6698	15,005
Average Party Size (aps)				2.99	
Weighting Factor	21.21	140.72	28.14	95.44	
Expected Travellers	10136	4503	6443	7062	28,145

Total Travellers (Air and Road)**48,262**

