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**Nwt Exit Survey - 1994 - Report On Visitors To
The Northwest Territories**

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**NWT EXIT SURVEY. 1994. REPORT ON
VISITORS TO THE NORTHWEST TERRITORIES**

Sector: Tourism

11-38-1

Statistics/Surveys

NWT Exit Survey 1994
General Report on Visitors to the Northwest Territories

Economic Development and Tourism

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Introduction

This document is based on the results of an exit **survey** conducted throughout the Northwest Territories approximately from the end of June through to mid September of 1995. The **survey** was designed to gather information on both resident and non-resident travelers including employment, income, activity patterns and likes and dislikes while in the **NWT**.

The survey was designed, conducted and analyzed by staff of Economic Development and Tourism, Government of the **NWT**.

This report 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**) on request.

Background

In 1989 the last major **NWT** wide exit **survey** was conducted. Several regional surveys have been conducted between 1989 and 1994 however no **survey** attempted to cover all regions. In 1994, Economic Development and Tourism launched several **surveys** with the aim of obtaining detailed information on travelers **and** visitor services in the **NWT**. These include a survey of visitors to visitor **centres in the NWT**, a telephone **survey** focused on 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 number**¹, 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 our visitor profiles.

The exit survey was the most comprehensive project of this type conducted in the tourism area in 1994. The industry and the 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.

1989 proved to be a banner year for visitation to the Territories; since that time, the **NWT** has seen a general decline in visitors. **This** decline is consistent with the general impacts inflicted on tourist travel by the economic recession which afflicted the major jurisdictions supplying visitors to the **NWT**.

With Canada and the United States emerging from recessionary doldrums, travel indicators are up in general. However, because the **NWT travel** market is highly dependent on a few key geographic areas, the economic health of **these** regions has a **modifying** impact on travel when compared to overall national or **North** American trends.

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

The following table shows changes in air and road **traffic** in the NWT since 1989:

	1989	1990	1991	1992	1993	1994
Air Passengers	115,246	107,091	96,946	94,842	96,913	96,590
Ferry Crossings	5,927	6,289	6,647	6,413	6,781	7,151

The number for air passengers includes both resident and non-resident travelers. The ferry crossing figures refer to non-residents only. Also, the 1994 figure for air passengers is a **preliminary** estimate only.

Survey Design and Methods

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 and 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 an indicative measure of success for marketing efforts in a variety of markets and market locations.

Description of survey design and delivery

The survey consisted of 21 questions covering a variety of topics ranging from a traveler's origin, primary destination, activities undertaken and income level. The **surveys were** administered at eight airports and four highway locations. For each survey zone, **survey** locations were as follows:

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

The **survey** was administered over the period July 1 to September 30, 1994. As an exit **survey**, **all** visitors were interviewed **as they** left the Northwest Territories. **Interviewees** were asked where they normally resided. If their home was located in the Northwest Territories, they were classified as a resident and excluded from this analysis.

A complete description of the field methodology can be found in the appendix.

Weighting of data

The weighting of the data was accomplished with the following formulations:

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

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

$$(2) \quad \frac{t}{s} \times \frac{v}{(v+r)} (\mathbf{u p})$$

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

Weighting formula (1) applies to **air** travelers, while (2) applies to road travelers. 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 travelers to **total** travelers) 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 travelers 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) $v \times (aps)$

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

Breakdown of Data

The 1994 visitor exit survey resulted in 2,600 completed interviews, of which approximately 11 percent were refusals, resulting in a usable sample of 2,294. 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
ZONE 1						431	18.8%
	Inuvik	0	71	80	51	202	8.8%
	Peel River	0	90	85	54	229	10.0%
ZONE 2						1339	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%
ZONE 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	2294	
Percentage Total by Month		1.4%	38.9%	39.5%	20.1%	0	

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 travelers' participation, perception 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 zone;
- . mode of transportation;
- . **primary** purpose of visit; and
- . origin of traveler.

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 or west. West was subdivided into zone 1, **Dempster Highway/Inuvik**, and zone 2, South Mackenzie. The **Eastern Arctic** was called zone **3**. Residency had two categories: resident of the NWT but not a resident of the exiting region, and non-resident of the NWT². Reason for travel had two categories: leisure and business. Business had a second **sub-category** of 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**.³ With 3032 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. The statistical reliability is reduced for questions which not everyone answered, and the reliability changes when different subsets (stratifications) are considered.

²This classification **does** not apply to the present **report**, which **analyses only non-resident travelers**

³Note 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. Alberta visitors represent by far the largest proportion (37%) of all visitors traveling to the NWT. Then come Ontario, the US, and British Columbia/Yukon. 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)

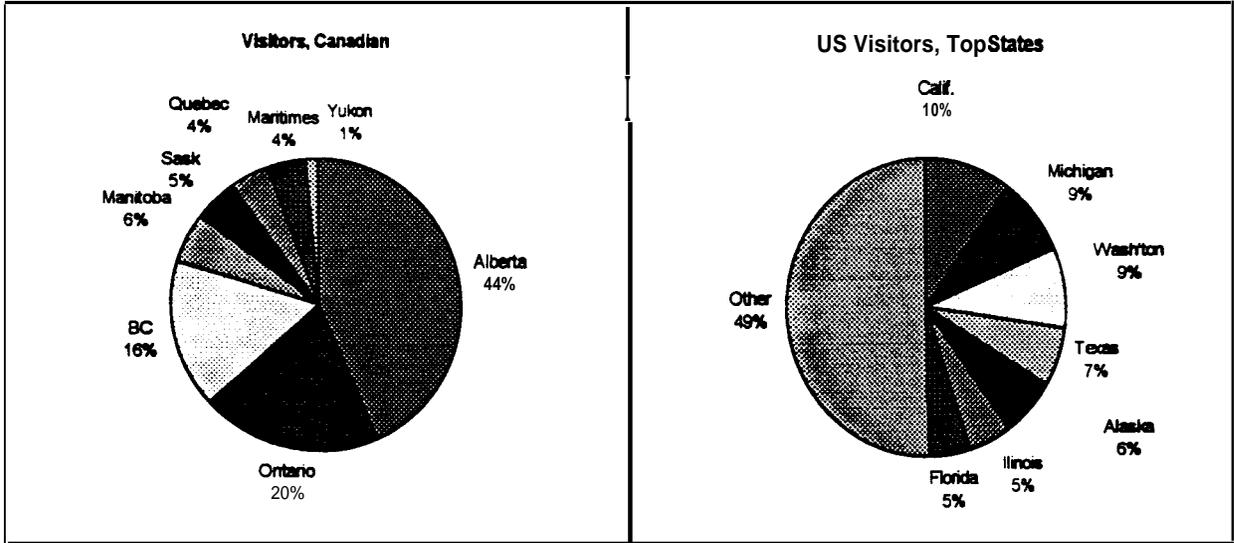
Origin	#of Visitors	Avg. Party Size	% of Total
CANADA	24,776	2.2	73.3%
Alberta	12,359	2.30	36.6%
Ontario	3,594	2.4	10.6%
B.C. / Yukon	4,936	2	14.6%
Prairies	2,348	2.1	6.9%
Eastern Canada	1,539	2.2	4.6%
USA	5,817	2.7	17.2%
California	578		1.7%
Michigan	504		1.5%
Washington	495		1.5%
Texas	382		1.1%
Alaska	375		1.1%
OTHER	3,215	2.8	9.5%
TOTAL	33,808	2.3	100.0%

Figure 1 shows the breakdown of visitor origin by Canadian and US point of origin. Albertans are by far the largest number of visitors from Canada. Ontario and British Columbia residents follow.

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.

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 (BC/Yukon) to 2.4 (Ontario). Foreign visitor party sizes were 2.7 for the US and 2.8 for other countries.

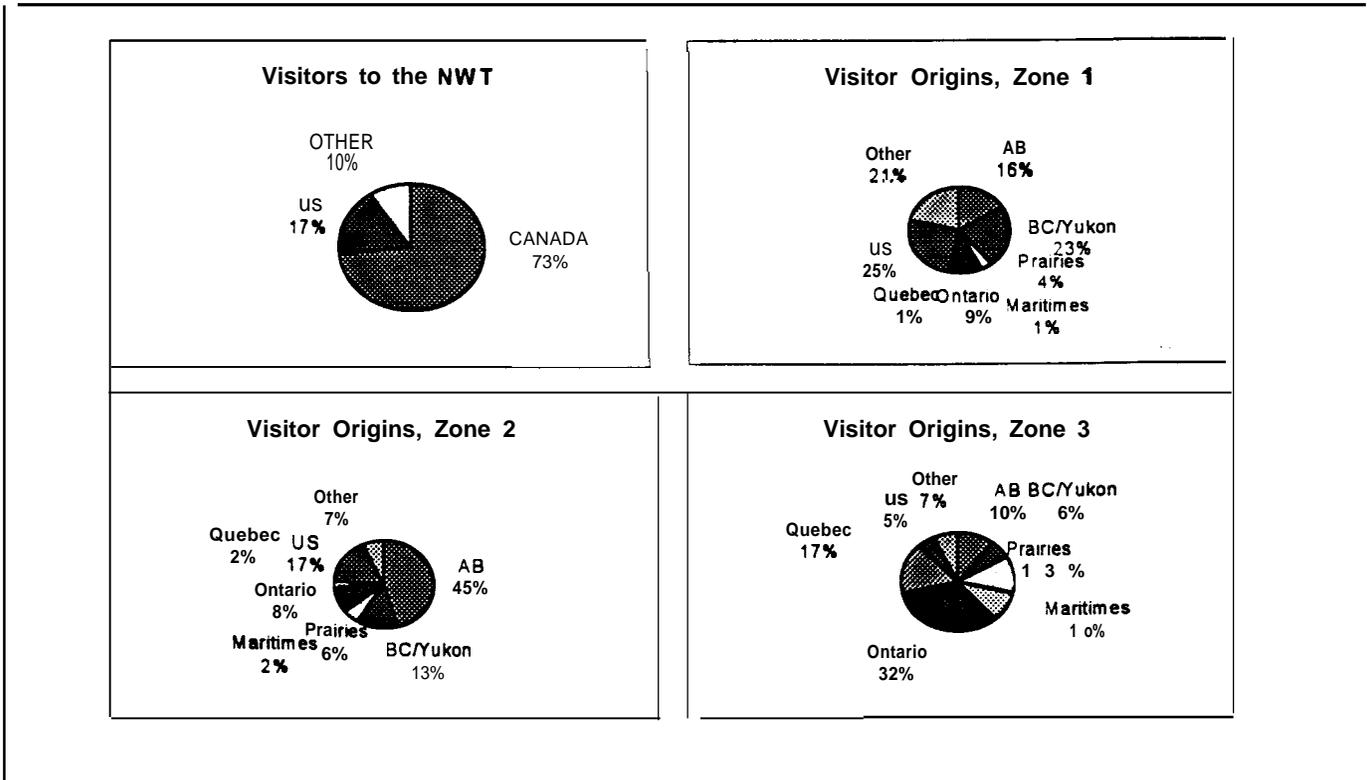
Figure 1 Origin of Visitors to the NWT



Visitor Origin by Destination

Figure 2 shows visitor origins to the three destination zones.

Figure 2 Visitor Origins by Zone



The largest proportion of foreign travelers (US and other) visited the Dempster/Inuvik region (zone 1), where these visitors accounted for **46%** of all visitation. The foreign component of visitation drops to 24% for the South Mackenzie (zone 2) and further to 12% for Eastern Arctic (zone 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 Zone

Table 3 presents the estimated visitor numbers and distribution by region. Figure 3 shows the relative distribution of visitors among the zones. In total, an estimated 33,808 people 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 Baffii Island.

Survey Location	Total	% of Total
ZONE 1	6,330	18.7%
Inuvik	1,637	4.8??
Peel river	4,692	13.9??
ZONE 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%
HayRiver	1,050	3.1%
Liard	3,056	9.0%
Yellowknife	7,22s	21.4%
ZONE 3	3,584	10.6%
Cambridge Bay	271	0.8??
Iqaluit	2,430	7.2%
Rankin Inlet	884	2.6%
TOTAL	33,808	

Table 3 Visitor Distribution

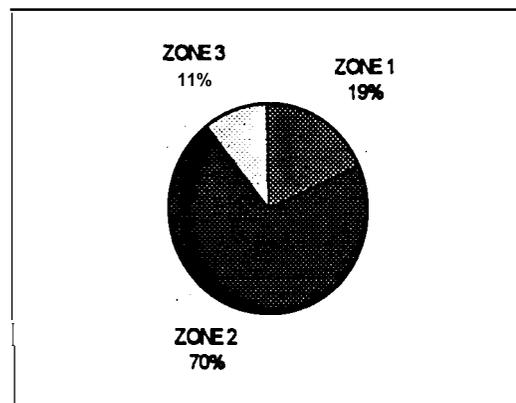


Figure 3 Visitor Distribution Among Zones

Visitor Travel Mode and Primary Purpose of Visit

In the Western Arctic (zones 1 and 2), more leisure visitors traveled by road than by air; the situation is reversed for business travelers (tables 4 and 5). In the Eastern Arctic (zone 3), almost twice as many visitors traveled for business as opposed to leisure. In the Western Arctic, more visitors were traveling for leisure than for business (refer to figure 3).

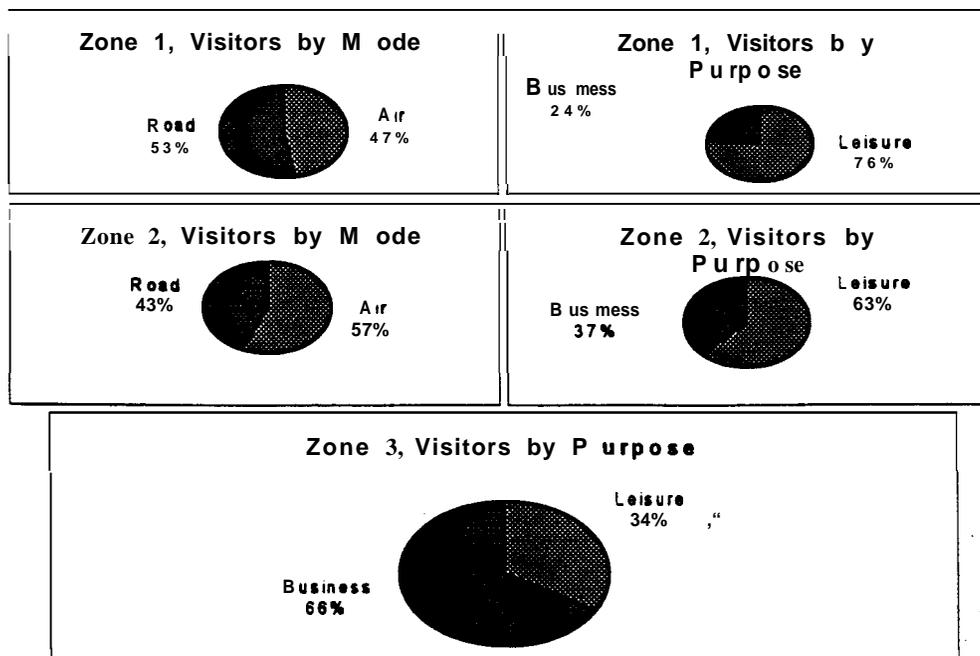
Table 4 How Visitors Traveled and Why (weighted)

	TOTAL				ZONE1				ZONE2				ZONE3	
	Air	%Air	Road	%Road	Air	%Air	Road	%Road	Air	%Air	Road	%Road	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	W???	1,622	15.6%	X I	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%	c l a w !!	

Visitors from the United States and other countries overwhelmingly visit the NWT for leisure. As expected, in zone 1 (Inuvik/Dempster), most foreign visitors drove. When travelling to zone 2, the majority of foreign visitors arrived by air (see tables 4 and 5).

Table 5 How Visitors Traveled to Their Destinations

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	1.60%	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	6.8%	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 make up the largest proportion of vehicle traffic in over all visitation. (table 6). RV'S and campers represented a higher proportion of vehicles in zone 1 (Dempster/Inuvik) than zone 2; these vehicles were the second most popular form of transport for visitors traveling by road.

Table 6 Visitors by Types of Vehicles

Vehicle Type	ZONE 1	ZONE 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, **all** visitors reported relatively high family income (table 7). Most visitors indicated family income 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 zone 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	1962	7.9%
\$20,000- \$40,000	5722	23.0%
\$40,000 -\$60,000	7745	31.2%
\$60,000 -\$80,000	4844	19.5%
Over \$80,000	4584	18.4%
TOTAL	24857	100.0%

Table 8 Visitor Income by Destination (Weighted)

	Income Group	Parties	% of Total
ZONE 1	Under \$20,000	462	11.0%
	\$20,000 - \$40,000	953	22.7%
	\$40,000 - \$60,000	1,263	30.0%
	\$60,000 - \$80,000	755	18.0%
	Over \$80,000	771	18.3%
	TOTAL	4,204	100.0%
ZONE 2	Under \$20,000	1,298	7.3%
	\$20,000 - \$40,000	4,337	24.3%
	\$40,000 - \$60,000	5,512	30.9%
	\$60,000 - \$80,000	3,428	19.2%
	Over \$80,000	3,279	18.4%
	TOTAL	17,854	100.0%
ZONE 3	Under \$20,000	201	7.2%
	\$20,000 - \$40,000	433	15.5%
	\$40,000 - \$60,000	970	34.7%
	\$60,000 - \$80,000	661	23.6%
	Over \$80,000	534	19.1%
	TOTAL	2,799	100.0%

Visitor Expectations

Overall, almost **all** visitors felt that their time in the **NWT** met or exceeded their expectations (table 9). **Less than 3%** felt that their expectations had not been met. **Visitors** to the Eastern Arctic (50%) were most likely to feel that their visit had exceeded their expectations. **Visitors** to South Mackenzie area were the least likely to feel (3370) that their visit exceeded their expectations.

Table 9 **Visitor Expectations** (weighted)

	Respondents	Exceeded	O/o of Total Met	% of Total	Not Met	% of Total	
ZONE 1	5,320	2,449	46.0??	2,655	49.9??	216	4.1%
ZONE 2	16,262	5,417	33.3%	10,191	62.7%	654	4.0??
ZONE 3	1,249	703	56.3?40	498	39.9??0	48	3.8%
TOTAL	22,831	8,569	37.5%	13,344	58.4%	918	4.0%

Visitor "Employment

Of people who **answered** this question, almost 45% reported that they were employed, another 18% said that they were self-employed, followed by retired (17.6%), professional (13%) and students represented 5% of visitors (table 10).

The proportion of retired visitors was significantly lower for the Eastern Arctic (8%) than the other two zones. Visitors to the Eastern Arctic were the most likely to report that were professionals while visitors to the South Mackenzie were the least likely.

Table 10 **Visitor Employment** (weighted)

	ZONE 1		ZONE 2		ZONE 3		TOTAL	
	Parties	% of Total						
Respondents	4,260	168%	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%6	11,229	44.39%
Self Employed	944	22.2%	3,126	17.2?!	470	16.2%	4,540	17.5%
Professional	754	17.7%	1,993	11.0??"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?40	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). Canoeing and boating were most popular among visitors to the South Mackenzie (17.6%) but considerably less popular in the Eastern Arctic or Dempster/Inuvik. Visitors traveling the Dempster were most likely to report community tours as an activity and least likely to go fishing. Visitors to the Eastern Arctic reported community tours as their most frequent activity followed closely by fishing; Eastern Arctic visitors were the most likely to report hiking and naturalist tours among their activities. Fishing and hiking were also frequently reported by visitors to the South Mackenzie (fishing, 19.6%, hiking, 12%). Very few visitors reported hunting (less than 1%); however, visitors who flew directly to hunting lodges were not directly interviewed in this survey.

Table 11 What Visitors Did in the NWT (weighted)

	ZONE 1		ZONE 2		ZONE 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%	7,884	55.3%	987	6.8%	14,441	100%

Travel Influences

Overall, the most important factor influencing travel to the NWT was the desire to visit family and friends (table 12). However, this factor was strongest only for visitors to the South Mackenzie (33.5%) and the Eastern Arctic (35.6%). Visitors to Inuvik mentioned this reason 12.8% of the time. For travelers on the Dempster Highway, the desire "to see the Arctic" was cited as the number one reason for their visit (28.5%).

The general desire "to see the Arctic" was a major factor influencing travel along the Dempster Highway and to the Eastern Arctic; this factor was much less influential for visitors to the South Mackenzie. For all destinations, word of mouth was reported as an important influence; this was especially important in zones 1 and 2.

Just a little over 1% of visitors reported that the NWT's 1-800 number had influenced their decision to come north. Magazine articles were a much bigger influence than magazine ads, outdoor/sport shows, television, and other ads.

Table 12 Factors Which Influenced Travel (weighted)

	ZONE 1		ZONE 2		ZONE 3		TOTAL	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
1-800 #	111	13%	247	1.1%	20	13%	378	1.2%
Adventure	29	03%	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	27.7%	722	33%	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	1%	2.2%	1,086	4.9%	50	3.1%	1,332	4.1%
Magazine Ad	1%	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	6.1%	2,900	13.1%	243	15.3%	3,674	11.3%
Other Ads	348	3.5%	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	1%	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	3,829	27.2%	22,108	68.0%	1,588	4.9%	32,535	100.0%

Rating of Attractions

The NWT scored very high 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.

There was some important regional variation in rating of attractions (see tables 14 to 16). Visitors to the Eastern Arctic were much more likely than other visitors to rate community events as very poor. Eastern Arctic visitors were also much more likely to give a very poor rating to nightlife and entertainment. Eastern Arctic visitors gave the highest ratings among visitors to observing wildlife and nature.

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

	RATING SCALE					RESPONDENTS	
	vary Poor Rating of 1	Rating of 2	Rating of 3	Rating of 4	Excellent Rating of 5	Parties	% of Total
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 27.3%	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	45.3%
Camping	475 26%	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%	7,330 53.5%	13,533	40.9%
Hunting	533 12.1%	337 7.6%	896 20.3%	721 21.9%	1,679 38.1%	4,412	13.1%
Nightlife/Entertainment	1,708 13.2%	2,218 17.1%	3,373 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: Zone 1, Dempster/Inuvik, (weighted)

ZONE 1

	RATING SCALE					RESPONDENTS	
	vary Poor Rating of 1	Rating of 2	Rating of 3	Rating of 4	Excellent Rating of 5	Parties	% of Total
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 34.3%	2,339	37.0%
National Parks	82 3.1%	119 4.4%	671 25.0%	843 31.4%	936 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: Zone 2, South Mackenzie (weighted)

ZONE 2

	RATING SCALE					RESPONDENTS	
	Very Poor Rating of 1	Rating of 2	Rating of 3	Rating of 4	Excellent Rating of 5	Parties	% of Total
Observing Wildlife/Nature	735 41.6%	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%	873 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%	1,475 14.5%	2,364 23.2%	5,644 55.3%	10,207	42.7%
Hunting	223 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%
Geography	171 0.9%	293 1.6%	2,311 12.7%	5,267 28.8%	10,255 56.0%	18,267	76.5%
Points of Interest	181 1.2%	478 3.1%	2,704 17.7%	5,756 37.7%	6,146 40.3%	15,265	63.9%

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

ZONE 3

	RATING SCALE								RESPONDENTS			
	Very Poor		Rating of 2		Rating of 3		Rating of 4		Excellent		Parties	"/. of Total
	Rating of 1											
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	5.8%	513	17.9%	948	33.1%	1,105	38.5%	2,868	80.0%
Community Events	2	17.9%	22	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%	7	2.0%	199	13.8%	374	26.0%	767	53.3%	1,440	40.2%
Fishing	80	5.2%	78	5.1%	169	10.0%	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%
Point 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 were generally less enthusiastic about services than attractions in the NWT. While service in accommodations was rated quite high, visitors gave lower scores for accommodation-value for money. This pattern was especially strong among Eastern Arctic visitors; these visitors were most likely to give very poor and poor ratings on value for money questions.

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

More Eastern Arctic visitors 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 ratings in the highest two categories 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 zones. Campgrounds in zones 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 in the Eastern Arctic rated campgrounds as very poor (1570).

Eastern Arctic visitors were most likely to rate the selection of tours as very poor. The majority of visitors to the other two zones rated tour selection in the top two categories.

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

	RATING SCALE					RESPONDENTS	
	Very Poor Rating of 1	Rating of 2	Rating of 3	Rating of 4	Excellent Rating of 5	Parties	% of Total
Accommodation: Service	512 2.4%	1,527 7.2%	6,350 29.9%	15,716 31.6%	6,139 29.0%	2,114	629%
Accommodation: Value for Money	2,203 10.0%	4,702 21.4%	6,629 30.1%	5,272 24.0%	3,208 14.6%	22,020	65.1%
Roads and Highways	2,105 7.5%	4,714 16.8%	<i>9,600</i> 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	<i>434</i> 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	<i>1,230</i> 5.9%	2,841 13.5%	7,032 33.5%	6,646 31.7%	3,219 15.3%	20,976	62.0%
Restaurants: Service	<i>701</i> 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%	4,457 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%	8,123	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%
Via 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)

ZONE 1

	RATING SCALE					RESPONDENTS	
	Very poor Rating of 1	Rating of 2	Rating of 3	Rating of 4	Excellent Rating of 5	Parties	% of Total
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%	1,560 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%	4,629	74.1%
Restaurants: Value for Money	212 4.7%	629 14.0%	1,660 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	52.5%
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%	4,037	63.6%

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

ZONE 2

	RATING SCALE					Responders	
	Very Poor Rating of 1	Rating of 2	Rating of 3	Rating of 4	Excellent Rating of 5	Parties	% of Total
Accommodation: Service	385 2.8%	1,060 7.9%	4,391 32.0%	3,756 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%	<i>311</i> 1.9%	2,571 21.4%	5,982 49.7%	3,000 24.9%	12,033	50.4%
service stations: s-	173 1.1%	1,160 7.1%	5,576 34.0%	6,505 39.7%	8,986 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%	14,309	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	54.4%
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)

ZONE 3

	RATING SCALE					RESPONDENTS	
	Very Poor Rating of 1	Rating of 2	Rating of 3	Rating of 4	Excellent Rating of 5	Parties	% of Total
Accommodation: Service	W 1.0%	173 6.2%	54 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:	192 24.3%	129 16.3%	183 23.1%	140 17.7%	147 18.6%	791	22.1%
Crafts/Art: Selection	75 26%	202 6.9%	369 12.7%	899 30.9%	1,364 46.9%	2,909	81.1%
Crafts/Art: Value for Money	341 121%	347 123%	664 23.3%	911 322%	564 20.0%	2,827	78.9%
Restaurants: Service	114 4.3%	182 6.8%	778 29.1%	988 36.9%	615 23.0%	2,877	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%	158 7.8%	550 27.7%	1,030 51.9%	1,956	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 travelers was 16.7 days compared to 9.3 days for road travelers. Leisure travelers tend to stay longer in the NWT than business travelers.

Table 21 Average Length of Stay (days) (unweighted)⁴

		Avg. Length of Stay
AIR		17
ROAD		9
ZONE 1		16
Air	Leisure	16
	Business	NSD
Road	Employment	NSD
	Leisure	17
	Business	5
	Employment	NSD
ZONE 2		12
Air	Leisure	14
	Business	11
	Employment	9
	Road	20
Road	Leisure	8
	Business	8
	Business	NSD
	Employment	NSD
ZONE 3		21
Air	Leisure	21
	Business	14
	Business	11
	Employment	28

⁴NSD indicates that the sample size was too small to allow calculation of a mean with sufficient confidence

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 traveling. 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.

Table 22 Travel Decision Timing

	Average Lag Time (months)	Sample Size
Zone 1	6.46	303
Zone 2	5.14	905
Zone 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 and by zone. 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 pay more 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 zones, 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 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 zones 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.

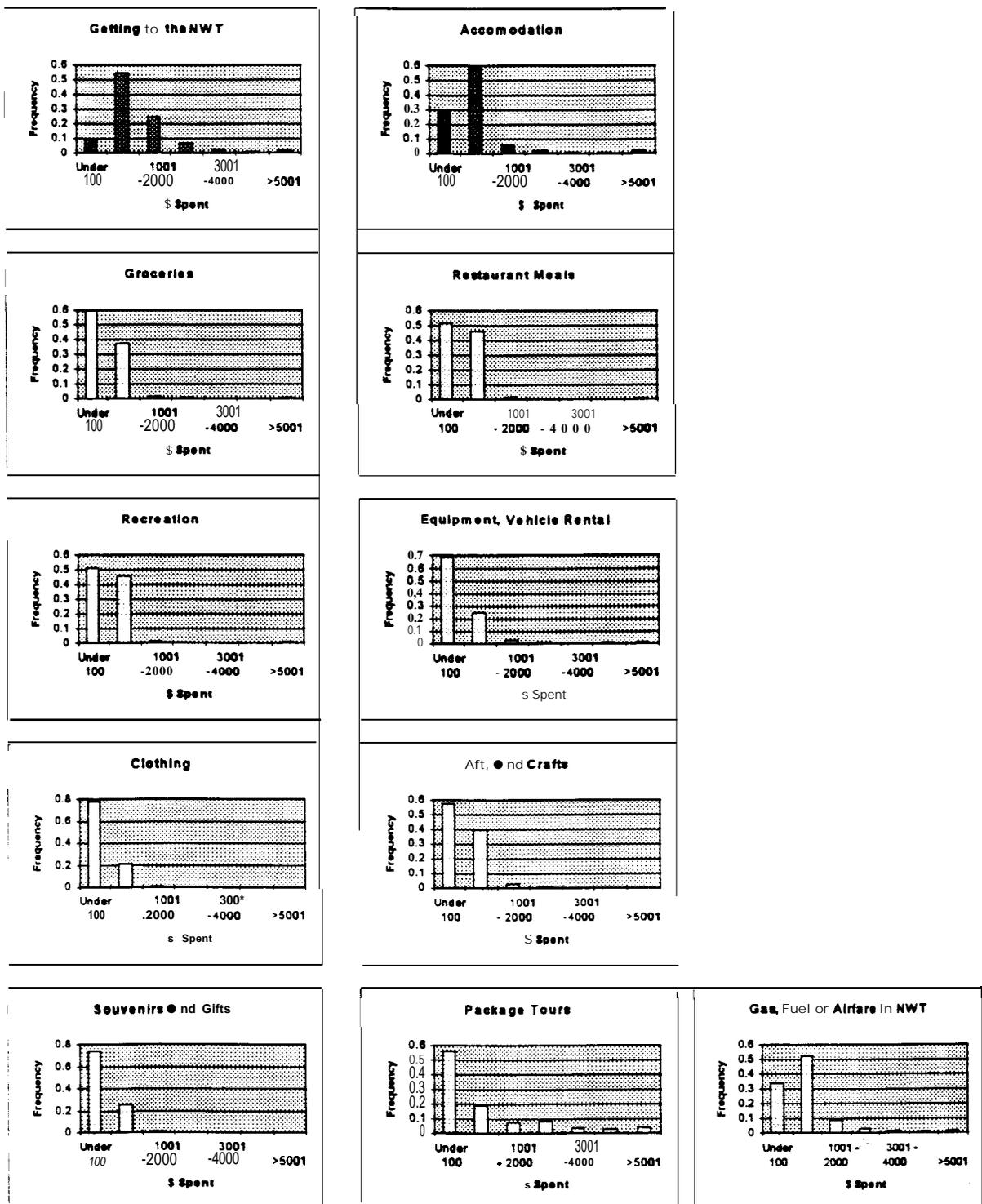


Figure 5 Frequency of Visitor Spending by Category, NWT Visitors

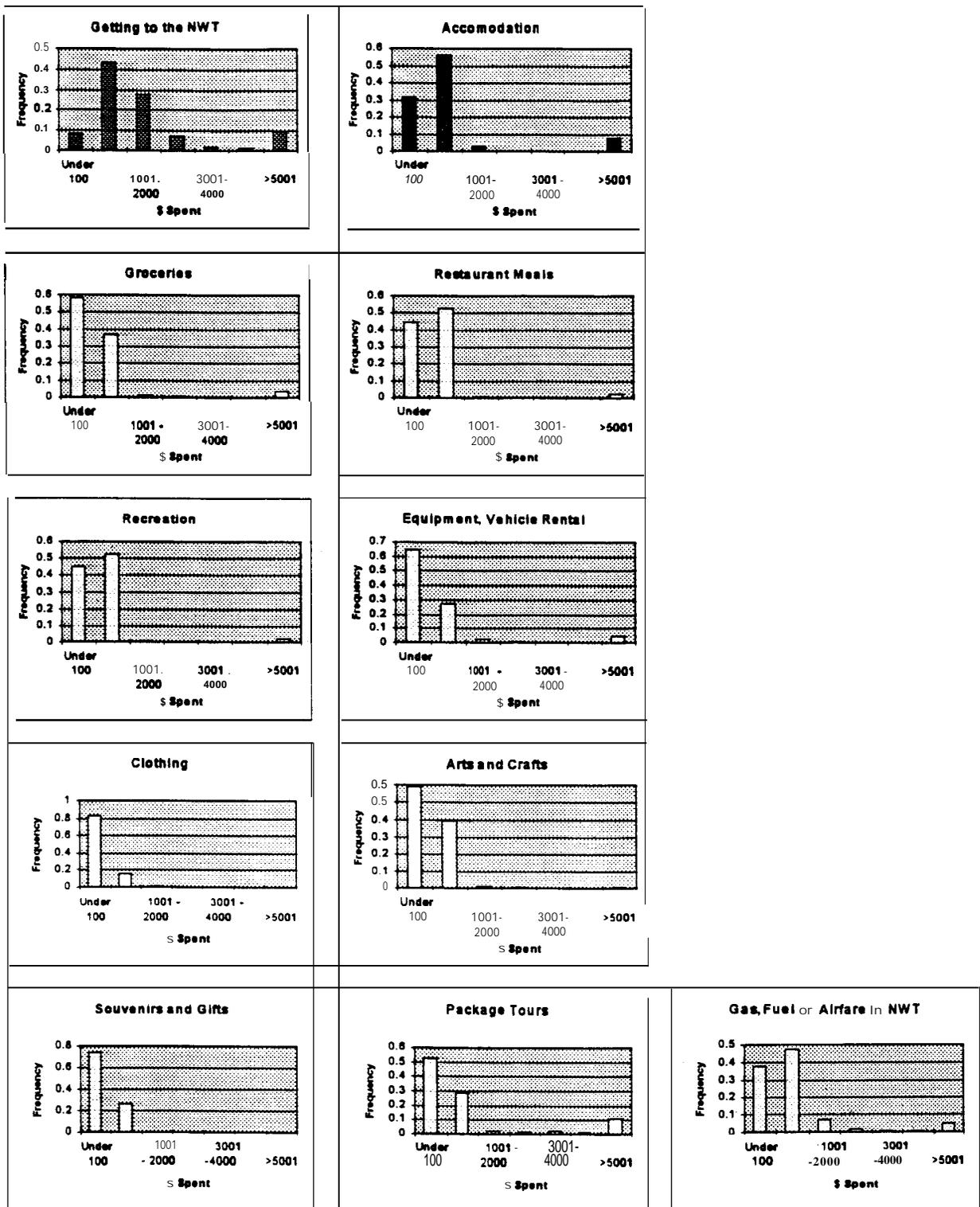


Figure 6 Frequency of Visitor Spending by Category, Dempster/Inuvik Visitors

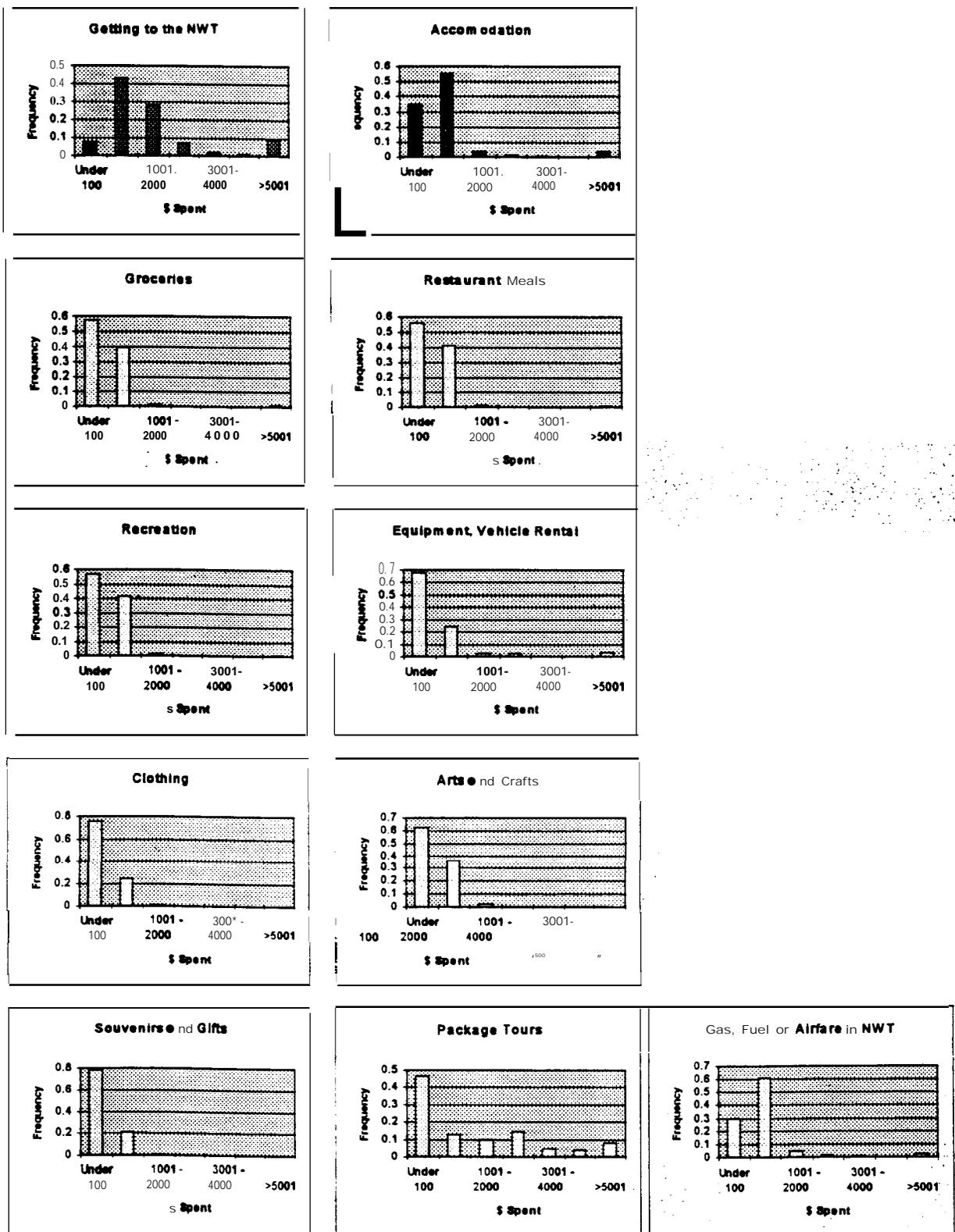


Figure 7 Frequency of Visitor Spending by Category, South Mackenzie Visitors

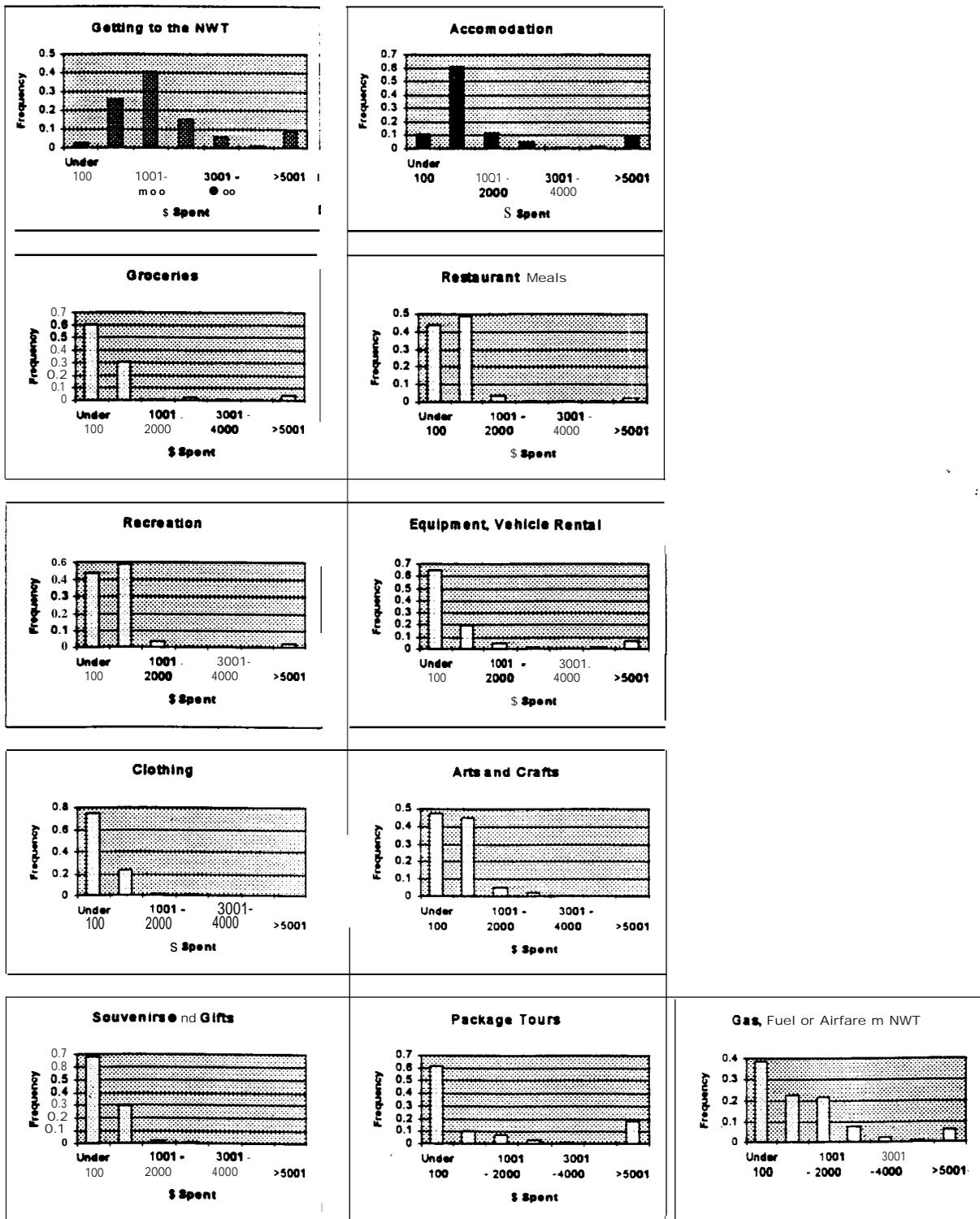


Figure 8 **Frequency of Visitor Spending by Category, Eastern Arctic Visitors**

Comparison with 1989 Survey

The following section compares the results of the 1989 **exit**⁵ 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. For comparison of overall visitor numbers, **corrections** had to be made to the 1989 estimate, by modifying the original traffic population estimates, which we believe was **incorrectly** interpreted.

Number of Visitors

In order to compare visitor numbers between **the** 1989 survey and the 1994, 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 from 15 May to 15 September. 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 we** used to adjust the 1989 exit survey can be found in **the appendix**.

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

Table 23 Comparison of Visitor Numbers, 1989 and 1994

Zone	1989			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 **air travelers** to the South Mackenzie, but an increase to both **the Eastern Arctic** and **Inuvik**. Road traffic increased by about 25% to the South Mackenzie, and **the number** of road travelers along the Dempster increased by almost 20%. The **overall result is** a net increase to the Eastern Arctic and the **Inuvik** area, and decrease to **the South Mackenzie**. **However, the total** change in the overall number of **travelers** between **the two years** is about three thousand people, a six percent increase.

It should be noted that after adjustment **were made to the weighting** scheme used in the **1989 survey**, a net estimate of visitors **was calculated as 45,256**, which is substantially different from the estimate of 55,651 provided **in the original 1989 report**.

⁵ *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 **73.57%**, US at **18.8%** and total foreign at 26.5%. The 1994 survey found proportions of **73.3%** Canadian, 17.2% US and 26.7% foreign.

Of Canadian visitors, the top three provinces remain fairly similar in visitor proportions. In 1989, **Albertans** accounted for 37.2%, **Ontario residents** 15.3%, and visitors from **BC** 10.6%; the 1994 study found these proportions to be, respectively: 36.6%, 10.6% and 14.6%. In 1994, **BC** occupies the position held by Ontario in 1989.

Visitor Destinations

The 1989 survey found that 15.3% of all visitors traveled to the **Dempster/Inuvik** area, 73.5% traveled 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 traveled 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 incomes 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 **travelers** 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. Again, general comments can be made with confidence.

Friends and relatives were rated as the most important travel "influence in both **survey** years. Television was a very small influence in both years.

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 "accommodation has improved, concern with high prices was evident in both" 1989 **and** 1994.

Average Length of Stay

In both 1989 and 1994, visitors traveling by air to the **NWT** tended to stay **considerably** longer in the **NWT** than visitors traveling 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 travelers made the decision to **travel within** four months of actually making the trip. In 1994, on average travelers made, the decision to **travel** five and half months prior to traveling. 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 spend 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, 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 particular impact on areas which receive a large proportion of visitors from any of these three markets.

Proximity to the destination has a major influence on the point of origin. Provinces which border destination zones are major contributors of visitors. The proximity of the Alaska Highway to the Inuvik zone 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 maybe explained in part by absence of roads.

In the Eastern Arctic, the proportion of business travelers is much larger than leisure travelers. Because of its size relative to the leisure market, business travelers may represent an under-exploited market for the East.

US travelers overwhelmingly visit the NWT by road. This pattern of travel has implications for 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 as factor 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 transposition 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.

Eastern Arctic visitors spend more on arts, crafts, souvenirs and gifts than visitors to other areas of the NWT. These visitors may have a better selection of such items to choose from.

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 zones

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

The NW's 1-800 number apparently has negligible impact on overall visitation to the NWT. Of all media promotions, magazine articles on the NWT appear to be the most influential in stimulating visitation. These results may affect the way tourism marketing dollars should be spent.

Overall patterns of origin remain the same between 1989 and 1994. proximity to the destination remains a very important factor influencing the traveler'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 the same, with Eastern Arctic visitors spending more than Western Arctic visitors.

In 1994, 3000 more visitors traveled to the NWT than visited 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 has probably played an important role in influencing some of these travelers. Travelers on 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 1992⁶. Between 1989 and 1992, air the number of air travelers declined by over 20%. Indicators for ferry traffic generally show an increasing trend since 1989. We expect that this upward trend will continue in pace with the economic recovery in the US and Canada.

⁶Since 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 the Eastern Arctic, the large majority of visitors are business travelers. Effort should be made to target business travelers as a market. In terms of product development, there appears to be unfilled demand for a greater number and variety of tours, particularly in the Eastern Arctic. In the Western Arctic, greater variety and volume of arts, crafts and souvenir products is required. However, these items should be relatively lower in cost than items currently marketed in the Eastern Arctic in order to capture a lower end market.
2. With the proximity of the Alaskan Highway traffic to the Dempster Highway, visitor centres such as the one in Dawson City which can divert these travelers toward Inuvik are good 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.⁷
3. Promotional efforts aimed at traffic traveling 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 department should seriously re-consider its investment in the 1-800 number program. The extremely low performance of the program as a travel influence suggests that the funds used to support the program maybe better used elsewhere.
5. In the same vein, the proportional investment in the print media campaign should be examined given the indications that magazine articles about the NWT have a much larger impact on travel intentions than advertisements.
6. 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.

⁷Benefit/cost analysis of visitor centres can be obtained from from Policy and Planning, ED&T . . -

Appendix

Comparisons Between the 1994 Exit Survey and the 1989 Exit Survey

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**.⁸

Survey Periods

The matter of differing survey periods was easily **rectified** by extrapolating the **1994 data** _____ over the longer (May 15 to September 15) **survey** period.

For air travelers, total flights (u) **per survey location** was increased to cover a period covering **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 tile adjustment for **the Enterprise** survey location was incremented using the highway traffic data collected by the Department of Transportation.⁹

Methodology

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

- the weighting formula for road travelers described **in the** Acres International study (page 2-3) was not the weighting formula actually employed;

⁸ **Northwest Territories Visitors Survey, Summer 1989**. Acres International January 1990.

⁹ **Northwest Territories Highway Traffic, 1993**. Department of Transportation, GNWT, September 1994.

- . 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
- . 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**)

$$(5) \quad \sum_{i=1}^4 (ET_i) \times (aps)$$

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

used in the Acres International study. **This formulation** establishes weights for each survey location by 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 travelers.

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. A result of the **re-working** of the 1989 study is that total non-resident visitation is estimated to be 45,256, and not 55,664.¹⁰ 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.

¹⁰ *Northwest Territories Visitors Survey, Summer 1989*. Acres International Ltd, January 1990, pages-is

Un-Modified 1989 Exit Survey Weighting Results**Air 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 (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 Travelers	505	779	1,181	1,758	3,530	1,063	676	12,717	22,209

Vehicle Passengers

	<u>Ft. Proy</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 (tIs)	13.855	5.958	8.179	53.598	
Expected Travelers	3,339	715	1,873	6,003	(11,930*2.80) = 33,404

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

Fully Modified 1989 Exit Survey Weighting Results: Modified wrt (4) and (5)Air Passengers

	<u>Cambridge</u>	<u>Ft. Smith</u>	<u>Hav 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 (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 Travelers	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 Travelers	9,349	2,002	5,244	6,451	23,047

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

Weighting factor for 1994 Exit Survey

Air Passengers	Cm	Edg	Bay	ort	Smith	Hay	River	Inuvik	Iqaluit	t. 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	.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	Pee	River	Enterprise	Total
Non-resident cars met (m)	2169	1022	1569	1773		6,533
Cars surveyed (s)	478	32	229	74		813
Total cars (l)	8321	3242	3796	6800		22,158
Resident cars (r)	6152	2220	2227	5027		15,625
Average Party Size (aps)					2.99	
Weighting Factor (t/s)*(m/(m+r))*aps	13.57	95.49	20.49	71.64		
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	t. 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**

FIELD METHODOLOGY

Introduction

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

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 done by the staff of the Planning Unit of **PP&HR**.

Methods

Survey Locations

The 1994 Exit Survey questionnaires were administered at regional airports, ferry crossings and at various locations on **N.W.T.** highways. There were three major questions that needed to be answered satisfactorily before a location **would** be accepted as a survey point. They were:

1. Was it a main departure point for a region?
2. Was there a high enough volume of **traffic** to **ensure that** the minimum sample sizes of 300 completed surveys for each region could be met?
3. Were there surveyors available to administer the questionnaires?

Based on the above criteria, the following locations were selected:

- . Mackenzie River ferry at Fort Providence (vehicles travelling southbound from YeUowknife/Fort Providence);

- Peel River **ferry** at Fort McPherson (vehicles **travelling** westbound from **Inuvik/Fort McPherson**, etc.);
- Mackenzie Highway at Enterprise (southbound vehicles)
- **Liard** Highway at Fort **Liard** (southbound vehicles)
- Airports - departures from Cambridge Bay, Fort **Simpson**, Fort Smith, Hay River, **Inuvik, Iqaluit and Rankin Inlet**.

Questionnaire Administration

To ensure 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. A schedule was developed so that travelers **travelling** at all times of *the* day at the various highway and ferry **locations** would be surveyed.

The questionnaires took approximately 10 minutes to complete and only those people **travelling** out of the administrative region were asked to complete a **survey**. For example, a passenger **travelling** from their residence in Arctic Bay to **Yellowknife** would not qualify as a respondent in **Iqaluit** since Arctic Bay and **Iqaluit** are in the **Baffin Region**. However, this same passenger returning to **Arctic Bay** could be surveyed at the **Yellowknife airport** since **Yellowknife** is in the North Slave region

In- addition to the 1994 Exit Survey questionnaires, **tally sheets** were developed to determine the ratio of resident and non-resident travelers 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 sheets** instead.

Completed **surveys** and tally sheets were returned to Economic Development and Tourism in **Yellowknife** where they were reviewed for completeness. They were then **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 maintained.

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” had been 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 required at the Enterprise **survey** location where **surveyors** were required to flag down motorists. **Surveyors** were equipped with orange safety vests, hand-held "Stop" signs and two 4' x 4' portable roadside signs. As an additional precaution, all surveyors at highway locations were required to work with a partner.

Field Personnel

An Exit Survey **co-ordinator** was **hired in** headquarters to help the regional offices 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. AU 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 and summer students were used whenever possible. In some **cases**, contracts were developed to facilitate the Exit **Survey**. For example, the South Slave region had a number of survey locations over a broad area so they contracted this activity to the South Slave Research **Centre**.

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.

All highway points, ferry locations and airports with multiple daily departures hired staff dedicated to survey administration.

Survey Dates

The Exit **Survey** was scheduled to begin during the week of June 28- July 2, 1994. **The** majority of the **survey** locations were able to begin during this week although a small number, due to staffing **issues**, were **unable to start** until the **following** week. The end date of the **survey** was originally scheduled **for** September 15, 1994 however this date was extended to September 30, 1994. **Some** regions were unable to extend the survey dates because the summer students had to return to school and there was no one available to administer the **surveys**.

Problems

The turnover rate of interviewers was extremely low. Only the Keewatin region had staffing problems which resulted in the Exit **Survey** being halted in that region for three

days (August 12-14,1994). Once replacement staff were **hired** the **survey** resumed and no **other** staffing problems were encountered.

The 1994 Exit Survey was designed **to** be an interviewer administered survey. In other words, the **surveyor** read the questions to the respondent and recorded the responses. The surveyors at the Peel River ferry and Fort **Liard** location distributed the questionnaires to travelers and then asked them to **complete the** survey themselves. Although **the** questionnaire was easy to follow, there were a number of questionnaires that were completed incorrectly and could not be used.