



Arctic Development  
Library

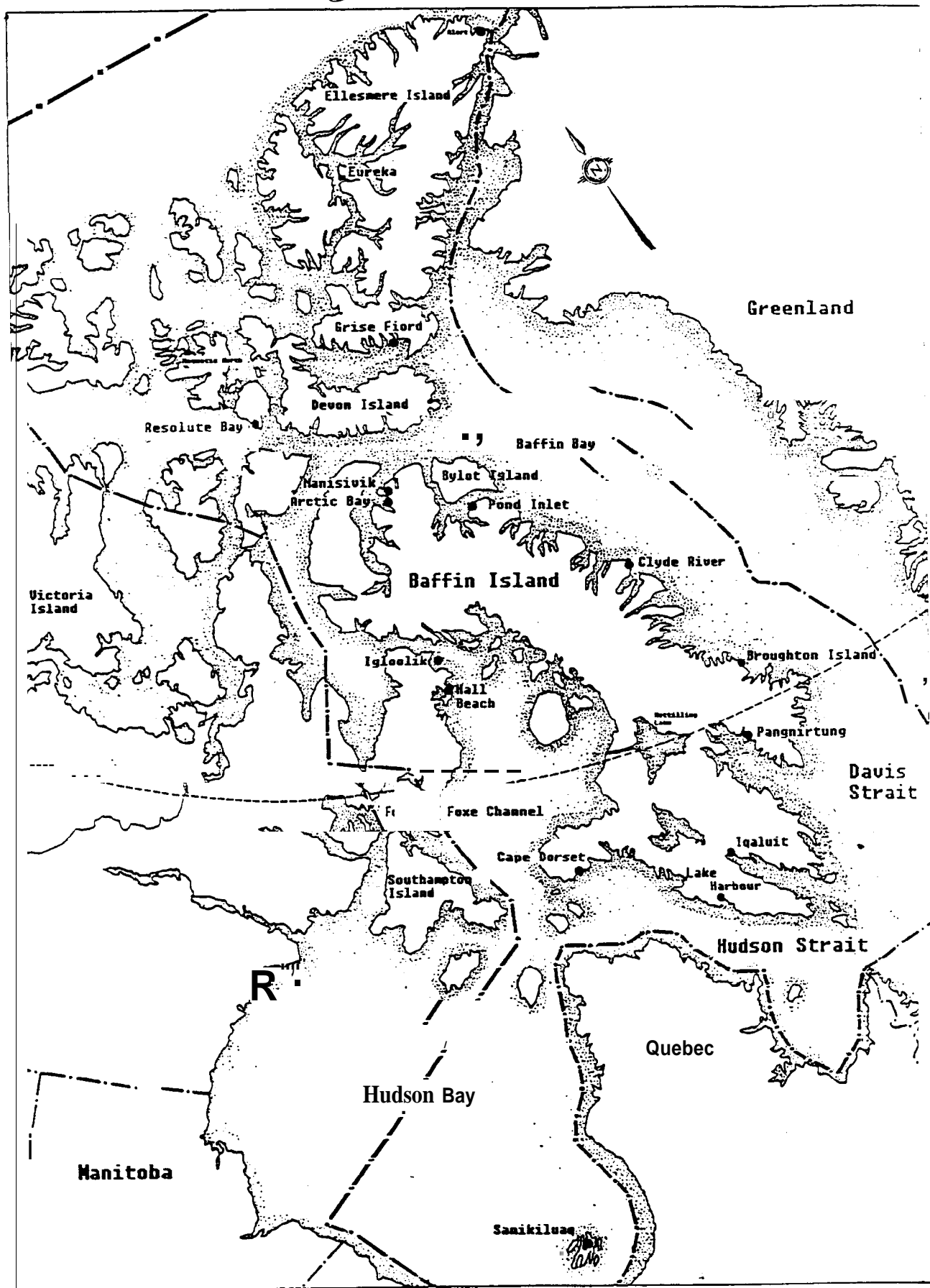
***In-fisherman Readership Survey***  
***Type of Study: Statistics/surveys Tourism,  
Nwt General Surveys***  
***Date of Report: 1987***  
***Author: G.n.w.t. - Economic Development &  
Tourism***  
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# **BAFFIN REGION TOURISM INDUSTRY OVERVIEW**

1994

Government **of the Northwest Territories**  
**Department** of Economic Development & Tourism  
Tourism & Parks Division, **Baffin** Region.  
May 1995.

# The Baffin Region of the Northwest Territories



**SUMMARY OF  
REGIONAL TOURISM INDICATORS  
BAFFIN 1994**

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- 1.0** Summary of Regional & Territorial Trends
  
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Tours**
  
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  - 4.2** **Visitor Surveys - Visitor Centres.**
  
  - 4.3** **Excerpts from 1994 Exit Survey - Nunavut Area**

## 1.0 TERRITORIAL AND REGIONAL TRENDS -1994

- The Eastern Arctic received **over 3,500 visitors** May through September, two thirds (2,430) of whom went to **Baffin Island**. (1)
- **Visitors to the Eastern Arctic reported community tours as their most frequent activity followed by fishing, hiking and naturalist pursuits**. (1)
- **According to the 1994 exit survey, Eastern Arctic visitors gave the highest rating of attractions among visitors to observing wildlife and nature, hiking/sightseeing/camping, and native culture.**(1) The annual package tour survey also recorded naturalist related tours as the highest generator of revenue in the **Baffin Region**.(3)
- **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 regions. This may reflect unsatisfied demand**. (1)
- **In comparing 1989 to 1994, there was an increase of travelers to the Eastern Arctic; in 1989 there were 4,711 air travelers, and in 1994 there were 5,052 air travelers, a 7.3% increase**. (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**.(1)
- **In comparing 1993 to 1994, there was an increase of 22.7% gross receipts for packaged tours, (\$434,564)**.(3)
- **Package tourists to Baffin region are more interested in Inuit culture, consume more country foods, have a higher degree of usage of paid accommodation, and are more likely to purchase arts and crafts than independent travelers**. (4)
- **Those tours which promise most economic benefits and pose least potential for scio-cultural disruption should be encouraged. Wildlife/nature and cultural tours appear to be the most promising in this respect**. (4)
- **Cruise ship traffic to the Baffin Region has grown steadily at a rate of about 100% annually since 1992**, (source **Marine Expeditions newsletter**)

(1) 1994 Visitor Exit survey

(3) 1994 Baffin Region package tour survey

(4) McGill Tourism Research Group, Report No. 6

## 2.0 NATIONAL AND INTERNATIONAL TRENDS

- Adventure Travel generated \$220 billion dollars in the United States in **1994** (2)
- **Adventure Travel is fast becoming the foundation** for active leisure travel (2)
- **Worldwide there are over 50,000 tour operators or adventure travel outfitters.**(z)
- **Adventure-travelers spend 10% to 15% more per trip than groups or sun and sand travelers.**(2)
- **Travelers are seeking more “back to nature” and personally enriching experiences.**(5)
- **Adventure travel and ecotourism will experience continued rapid growth and become more integrated into the mainstream of international travel and tourism.**(6)
- **Travelers want to get off the beaten track and experience first hand the environment and the indigenous people and wildlife that live in balance with them**(5)
- **According to the Conference Board of Canada, in 1995 operators should prepare for slower growth as the brakes are applied to the U.S. economy.**(7)
- **France and Japan were high inbound markets for Canada in 1994, registering more than a 15% increase in visitors. The U.S. Market was also very positive this year for Canada - up nearly 5% from the 1.5% increase in 1993.** (7)
- **France was the star inbound market for Canada in 1994 as far as growth rates are concerned. Since 1988, the number of travelers coming from France to Canada has increased by 82% to over 420,000 in 1994, a 17% increase over 1993.**(7)

(2) The Adventure Travel Society Inc.

(5) 1991 World Congress on adventure Travel and EcoTourism.

(6) LDR International Inc.

(7) Conference Board of Canada, Canadian Tourism Research Institute.

### **3.0 MARKETING AND PROMOTION**

- For Americans who travel to Canada by air for vacation, travel agencies are the number one source of information used to plan their trips.(7)
- Only 6% of vacation travelers said they used newspaper or magazine advertisements to plan their trip. Less than 2% had referred to a television or radio advertisement. Travel offices were also seldom used.
- Familiarization and Media tours. Value of media tours are based on the accepted industry conversion rate used to determine the value of a published article is to multiply the cost of a similar size advertisement by 3. For example, if a full page ad costs \$10,000., the value of the article is \$30,000.

FAMILIARIZATION AND MEDIA TOURS  
BAFFIN REGION

1. MEDIA TOURS

WHS131A131M	NAME OR MEDIA REPRESENTATIVE	PRODUCT	COMMUNITY	DATE(S)	DEPT. SUPPORT	RESULTS	VALUE
	Transbaffin White water Challenge Andy Bridge Co-ordinator	Adventure Media	Clyde Riv Quilikkut	August	Outfitter/accm. 1,824.00	& articles published by June, more expected.	9,000.00
	Ashvin Metha Tulsi, Tithal - 396006, Gujarat India. Fax 91-2632-53709	Photography	Pangnirtung Allivaktuk	July 20 to July 30	Accom " 960. Outft. 900.	Exposure in new book	6,000.00
	Wolfgang Weber Germany.	Photography	Katannilik, Pang.	Aug. 15 to Aug. 28	Airfare, outfitters accommodation, meals Film - 8,000.	Photo library upgrade	16,000.00
	John & V. Moss Ottawa, Ont.	Trail planning & media	Purtaavik Iqaluit	July	Outfitter 4,000.00	Media exposure Trail guide.	10,000.00
	J. F. Bergeron Quebec.	Photography & media	Broughon Arctic Bay	July/Aug.	Accommodation \$3,000.	Media exposure Book on Baffin Island Acknowledgment in book	3,000.00
	Brent Sender Film Service South Africa	TV Commercial	Iqaluit Iqoolik?	April/June	Logistical Support	Exposure of Region in Commercial	Not Known
	Mr. David Suzuki c/o Adventure Canada Toronto, Ont.	Reconnaissance	Katannilik	August	Transportation 600	Expose of park for potential TV coverage	Not known



MEDIA REPRESENTATIVE	PRODUCT	COMMUNITY	DATE	DEPT.	RESULTS	VALUE
Donna Carter Globe & Mail, Toronto	Media	Iqaluit Northwinds	May 25-28	Accommodation	Exposure of prods. in newspaper	3,000.00
Gogol Lobmayr, Mr. Franz-Joseph Rechtenwald Munchen, Germany.	35 M/M film	POND Inlet T.S. Co-op	August	Some outfitter and accom costs	Credit at and of film & brochure	9,000.00
Gene Sloan U.S. To-day magazine	travel articles on Arctic Bay	Arctic Bay Niglasuk	June 16 to Accom & Outfitter 21-Jun costs, \$ 3,978.	Outfitter costs	Magazine articles 3 to 5 page story	9,000.00
Ben Webster CBC Radio and Toronto Sun Newspaper Toronto, Ont.	Media Photo-story	Auyittuq Allivaktuk	August	Outfitter costs	Newspaper story on climb and radio interviews.	3,000.00
National Film Board of Canada Ottawa	Documentary	Iqaluit Lk. Harbour Pangnirtung	June 20 to Information June 27th	June 20 to Information	Documentary on tourism training	Not known
Hauser Exkursion Internation Freddy Langer Frankfurter Allgemeine newspaper Frankfurt, Germany.	Media Newspaper	Pangnirtung Auyittuq Allivaktuk	August	Accommodation Transportation	Story on Pang featuring park in travel supplement of newspaper. 3 to 5 page story	9,000.00
(1) Value based on average cost of 1/4 page colour ad in magazines. (2) Value based on cost to purchase photographs. (3) Value based on cost to purchase service and 1/4 page colour ad.						\$ 27,687. TOTAL ESTIMATED VALUE
						75,000.00

Z,, FAMILIARIZATION TOURS

OHM31VS31M31VNM3 OR  
 MEDIA REPRESENTATIVE

PRODUCT	COMMUNITY	DATE(S)	COMMUNITY SUPPORT	RESULTS/VALUE
Ed Friedman, Dragon Works Inc. Maine, USA	X-country skiing Kayaking	Pond Inlet Eclipse Sound	May 16-21 Outfitter/Accom. 1,030.00	2 pkg tours in 1995 24 clients
Winfried Hagan Hauser Exkursionen International Germany	Trekking	Auyutituaq Park	Aug. 14 to Outfitter 960	pkg. tours in 1995 Estimates 40 clients
Mr. Michael Vogelley Dav Summit Club Germany	Trekking Hiking	Auyutituaq Katannilik	Logistics snd July	1 pkg. to Auyutituaq Spring to Katannilik Summer to Katannilik (2) 40 clients
Prof. J.G. Norris Arctic Overland, nor., Can. Expedition Maine, USA	Naturalist tours	Pond Inlet Eclipse Sound Outfitting	Air passes First Air August	Summer pkgs. of 8 to 10 people in 1995
Haven Tours/JTC Yellowknife/Japan.	Naturalist	Cunningham Inlet	Accommodation Outfitter August	Potential of several pkgs. in 1995 Est. 40 - 60 clients
5,960.00 Total Estimated value				
				271,800.0

## **4.0 RESEARCH AND EVALUATION**

**4.1 Package Tour Survey and Analysis**

**4.2 Visitor Surveys - Visitor Centres**

**4.3 Excerpts from 1994 Exit Survey - Nunavut Area.**

## PACKAGE TOUR SURVEY -1994

### Summary

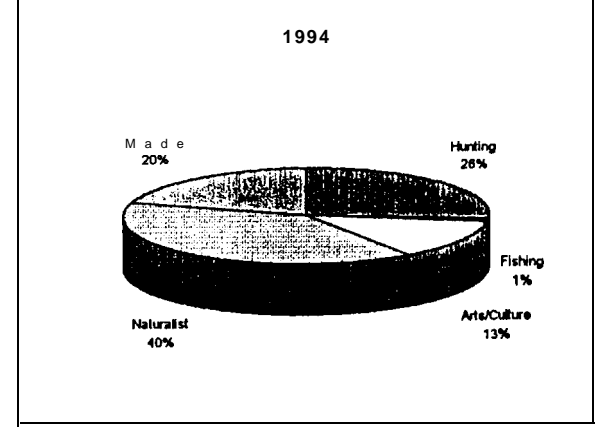
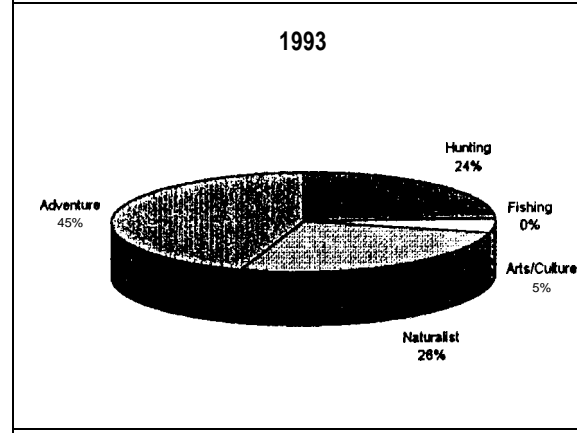
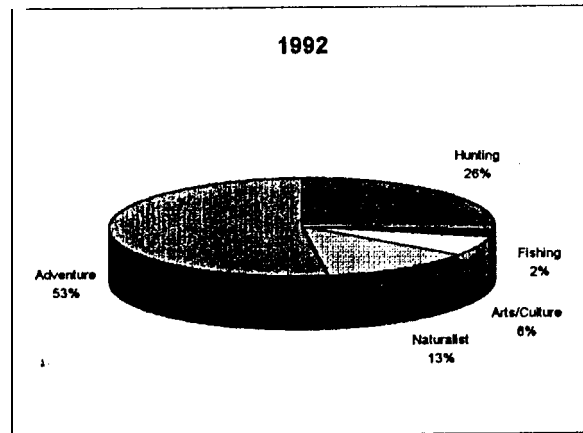
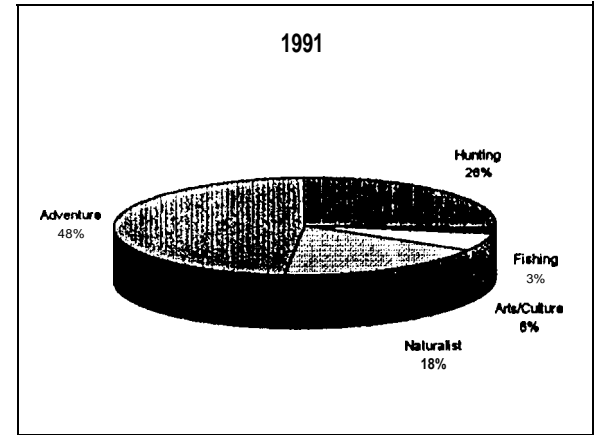
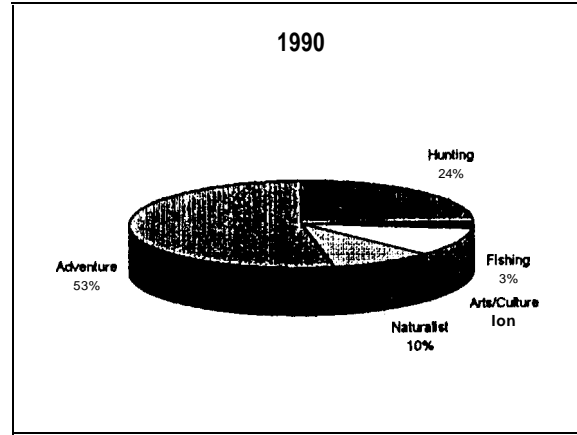
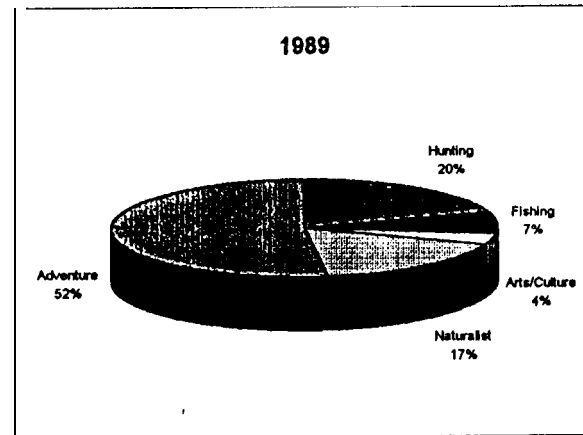
TYPE OF TOUR	NUMBER OF CLIENTS •	GROSS RECEIPTS
Adventure	429	479,985.67
Naturalist	510	919,746.67
Arts/Culture	463	304,325.00
Hunting	69	619,505.00
Fishing	22	29,666.67
<b>TOTAL</b>	<b>1,493</b>	<b>\$ 2,353,229.01</b>

COMMUNITY	NUMBER OF CLIENTS •	GROSS RECEIPTS	VALUE/ CUENT
Arctic Bay	95	252,100.00	\$ 2,653.68
Broughton Island	133	247,300.00	\$ 1,859.40
Cape Dorset	115	78,555.00	\$ 683.09
Clyde River	45	97,000.00	\$ 2,155.56
Grise Fiord	50	108,000.00	\$ 2,160.00
Iqaluit	447	189,325.00	\$ 423.55
Lake Harbour	156	136,709.00	\$ 876.34
Pangnirtung	155	180,052.50	\$ 1,161.63
Pond Inlet	55	109,637.50	\$ 1,993.41
Resolute Bay	395	954,550.00	\$ 2,416.58
<b>TOTAL</b>	<b>1,548</b>	<b>\$ 2,353,229.00</b>	<b>\$ 1,638.32</b>

**NOTE:**

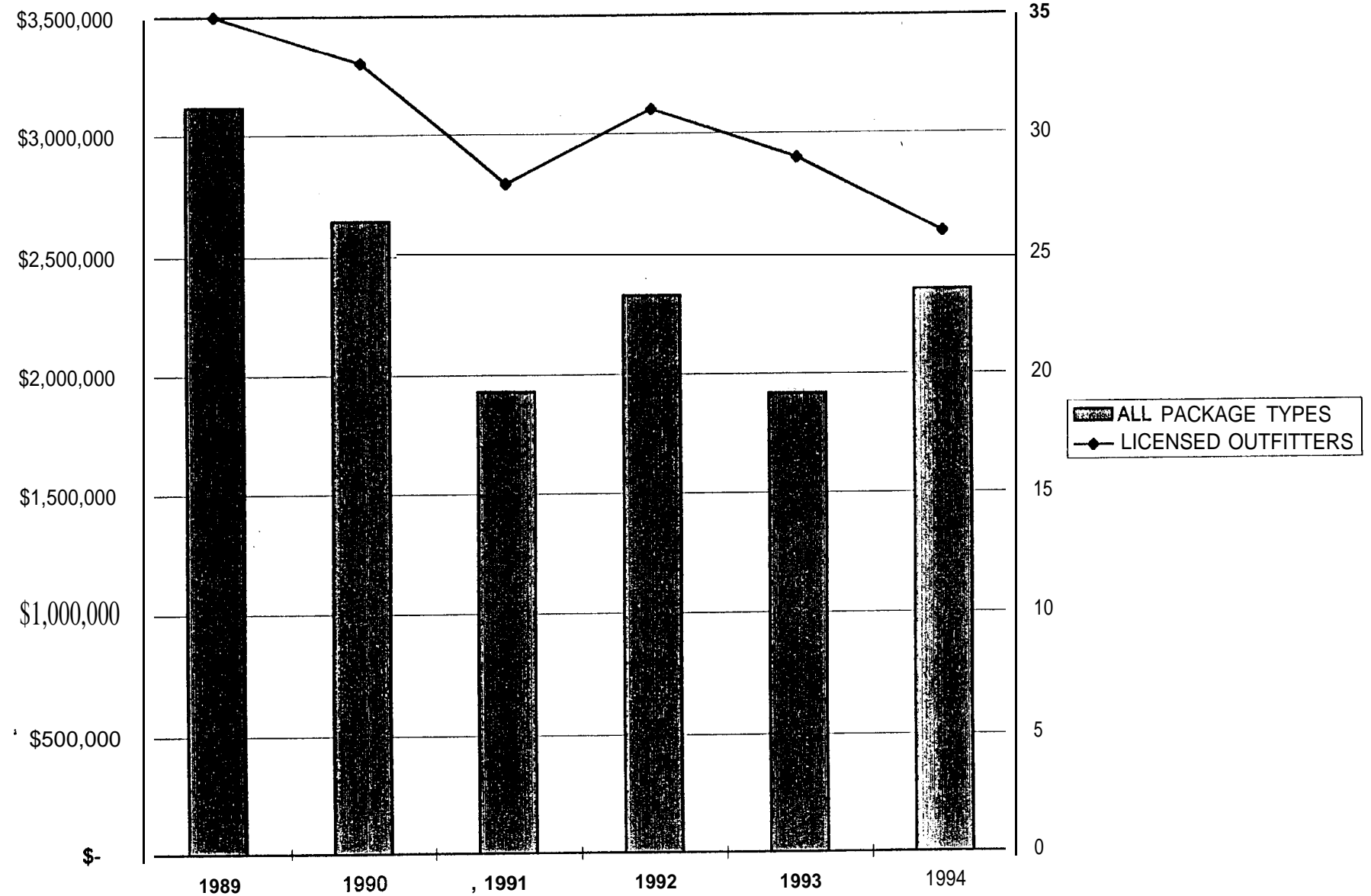
- Totals of clients by 'package type' and 'community' do not balance due to instances of double counting (i.e. the same group of tourists visiting 2 communities are included in the totals of both communities.).

**PACKAGE TOUR ANALYSIS**  
 'Type' Share of Total Revenue, **Baffin Region 1989-1994**



# PACKAGE TOUR ANALYSIS

## Total Package Tour Revenue vs. Licensed Outfitters Baffin Region, 1989-1994

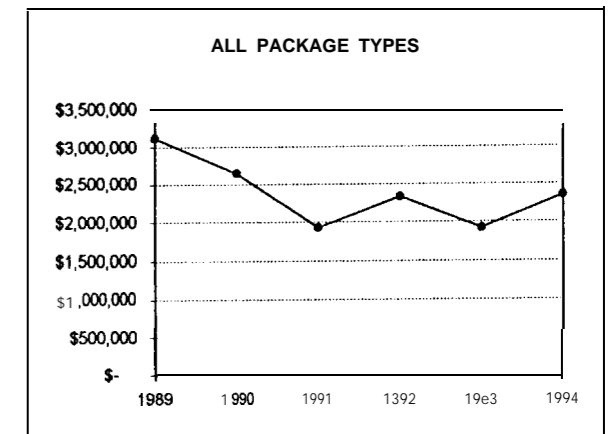
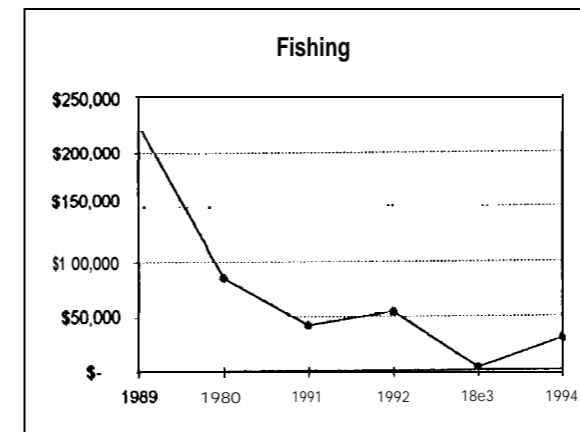
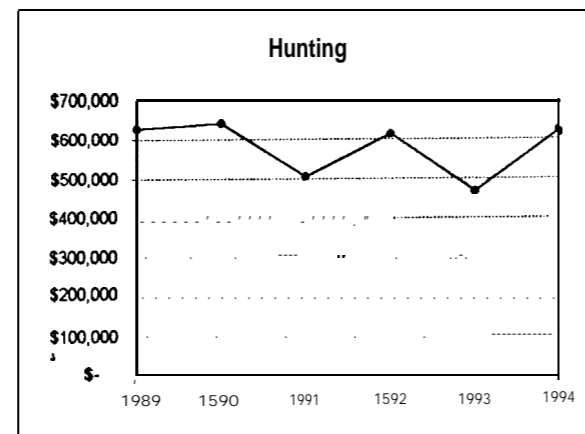
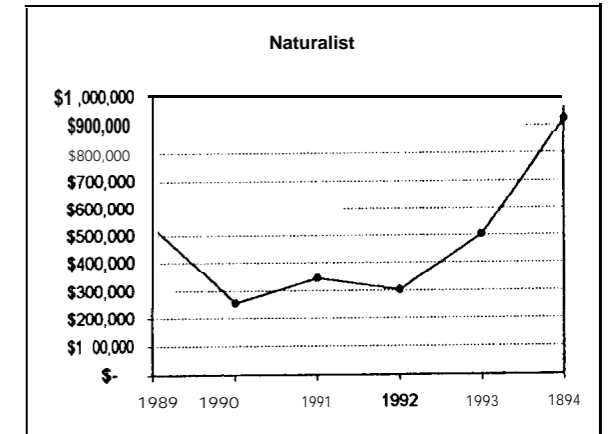
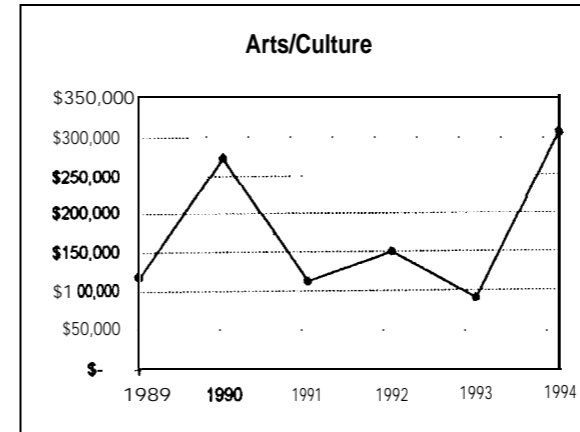
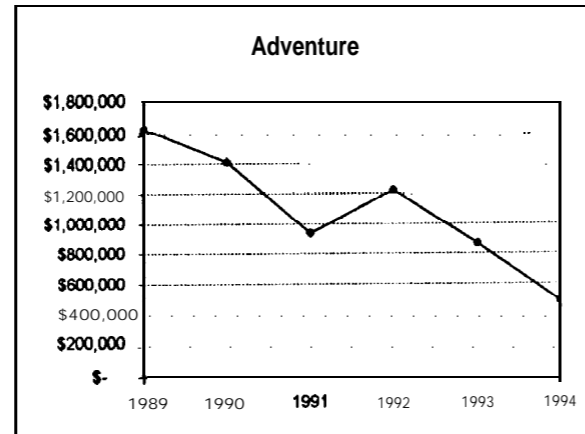


Source: Economic Development Tourism, Tourism Division

Licensed Outfitters Baffin Region

Community	1989	1990	1991	1992	1993	1994
Arctic Bay	1	1	1	1	1	2
Broughton Island	5	3	2	2	2	2
Cape Dorset	1	1	1	1	0	1
Clyde River	0	0	1	1	1	1
Grise Fjord	0	0	0	0	0	0
Hall Beach	0	0	2	1	0	0
Igloolik	2	1	1	1	0	0
Iqaluit	7	7	4	4	5	7
Lake Harbour	0	0	1	1	2	1
Pangnirtung	13	14	9	11	9	7
Pond Inlet	2	2	2	2	2	2
Resolute Bay	1	1	1	1	1	1
Other	2	2	4	5	5	4
<b>Totals</b>	<b>35</b>	<b>33</b>	<b>28</b>	<b>31</b>	<b>29</b>	<b>26</b>

**PACKAGE TOUR ANALYSIS**  
**Revenue by Package Type, Baffin Region 1989-1994**





## **4.2 Visitor Surveys - Visitor Centres**

**Unikkaarvik Regional Centre  
Iqaluit.**

Unikkaarvik Visitors' Center  
Parks and Visitors' Services  
Iqaluit, N.W.T.

Visitors' Tally : from 01/01/95 to 04/15/95

The total number of visitors to N.W.T. = 524

The total number of residents from N.W.T. = 707

**Total** number of visitors to Unikkaarvik = 1231

The figures are from the tally sheets kept at the Visitors' Center,  
which are done on a daily basis.

The figures pick up considerably during spring and summer months.  
(please note that these are for the winter months.)

✓ 5 ✓ J'X<sup>6</sup>

Annie Ange'yuk

**Unikkaarvik** Visitors' Center  
**Parks** and Visitors Services  
 Iqaluit, N.W.T.

**1994** Visitor Tallies

Month	Visitors to NWT	Residents of NWT	Total traffic per month
January	63	200	263
February	109	145	254
March	132	235	367
April	173	313	486
May	161	217	378
June	357	<b>222</b>	579
July	317	168	485
August	454	224	678
September	185	117	302
October	88	251	339
November	172	100	272
December	<b>42</b>	<b>86</b>	128
<b>Total</b>	<b>2,253</b>	<b>2,278</b>	<b>4,531</b>

These **figures** are from the **tally** sheets that are kept at the Visitors' Center. They **are done** on a daily basis by the staff.

## **4.2 Visitor Surveys - Visitor Centres**

### **Angmarlik Centre Pangnirtung**

**Angmarlik Visitor Centre**  
**1994 Visitor's Countsheet**

Month	Visitor's to the NWT	Residents of the NWT	Total Visitors
<b>January 9-31</b>	<b>8</b>	467	475
<b>February 1 -28</b>	<b>15</b>	719	734
March 1-31	<b>30</b>	485	515
April 1-30	<b>45</b>	375	420
May <b>1 - 31</b>	<b>95</b>	538	633
June 1-30	<b>153</b>	808	961
July 1-31	<b>898</b>	1397	2295
August 1-31	<b>905</b>	1272	2177
September <b>1 -30</b>	<b>27</b>	329	356
October 1-31	<b>13</b>	398	411
November 1 -30	<b>17</b>	317	334
<u>December <b>1 - 31</b></u>	<u><b>25</b></u>	<u>213</u>	<u>238</u>
Totals	2231	7318	9549

## 4.2 Visitor Surveys - **Angmarlik Centre, Pangnirtung.**

Responses from Questionnaires administered at the visitor centre.

### Gender of Respondants

Females	112	Males	53
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### Number of people from Countries listed below:

France	5	Switzerland	2	
U.S.A.	28	Germany	10	
Australia	4	England	22	
Spain	3	Canada	91	<b><u>Total 165</u></b>

### Age Groups:

Under 16	6	16 to 25	38	
26 to 35	60	36 to 45	25	
46 to 55	26	56 and over	10	<b><u>Total 165</u></b>

### Activities Tourists participated in:

Hiking	41	Boat Trips	9	
Mountaineering	15	Char Fishing	5	
Community Tours	8	Sports fishing	3	
Research	1	Photography	25	
		Other activities	11	<b><u>Total 165</u></b>

### How Tourists became aware of Pangnirtung:

Brochures	12	Magazines	13	
Airlines	2	Travel Agents	3	
		Others	32	<b><u>Total 62</u></b>

# 1994 VISITOR EXIT SURVEY

## AREA 3, EASTERN ARCTIC, SUMMARY

Area 3 survey locations were, Iqaluit airport, Rankin airport, and Cambridge Bay airport.

### Distribution of Survey Interviews

Survey Location	Jun	July	Aug	Sept	Total	% of Total
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%

### Visitor Origins

Ontario	32%	Alberta	10%
Quebec	17%	BC/Yukon	6%
Prairies	13%	US	5%
Maritimes	10%	Other	7%

In total, an estimated 33,808 non-resident travelers visited the NWT from the beginning of July, 1994 through to the end of September 1994. The Eastern Arctic received over 3,500 visitors, almost two thirds of whom went to Baffin Island.

### Visitor Distribution

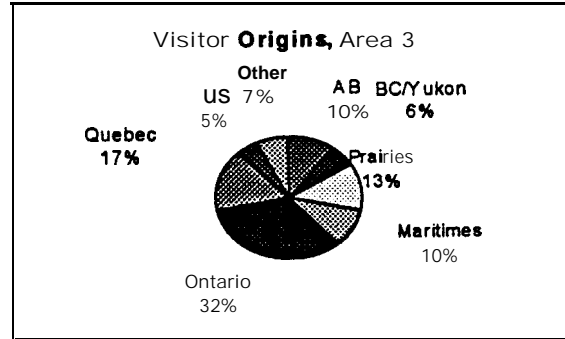
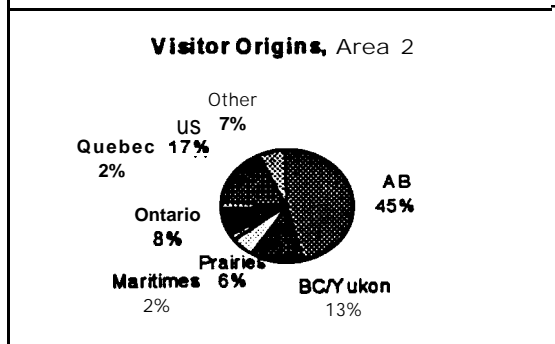
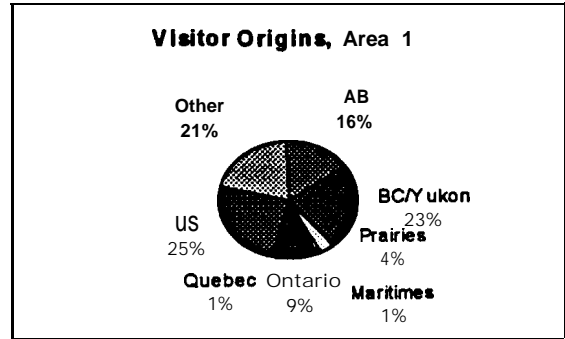
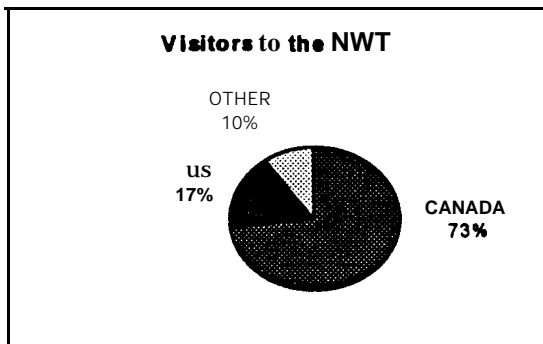
Area 3	3,584	10.6%
Cambridge Bay	271	0.8%
Iqaluit	2,430	7.2%
Rankin Inlet	884	2.6%

### Primary Purpose of Visit

In area 3, almost twice as many visitors traveled for business as opposed to leisure.

Leisure 1,312- 34% Business 2,270- 66% Total 3,582

## Viitor Origins by Area



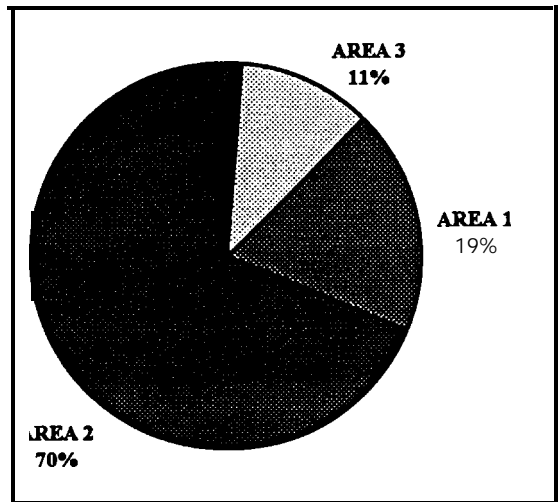
SOURCE: 1994 NWT Exit Survey, Planning Section, PPHR, Economic Development & Tourism, March 1995.



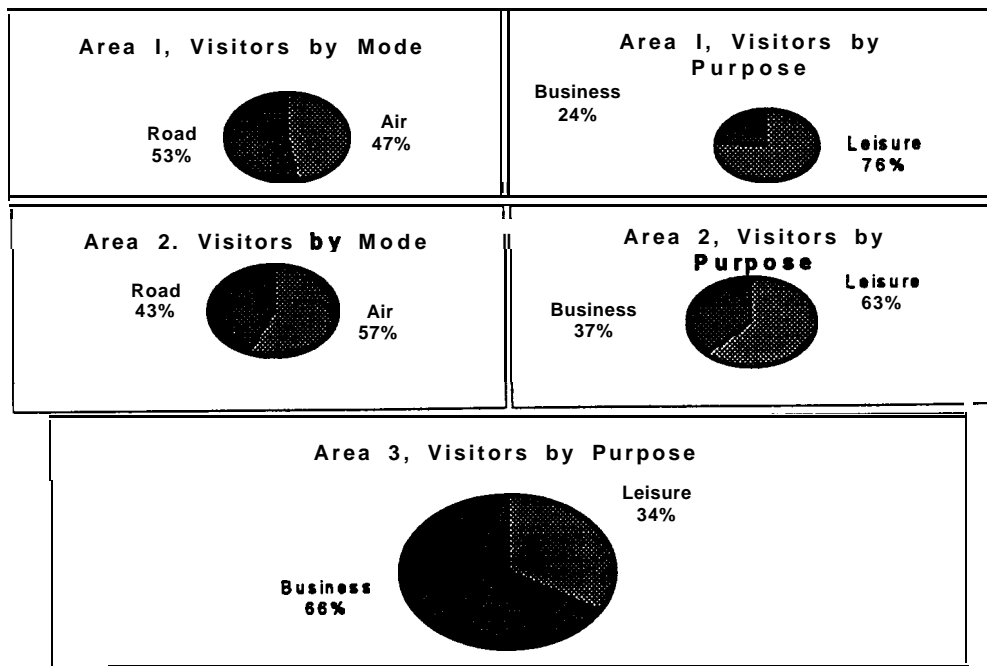
### Visitor Distribution (weighted)

Survey Location	Total	% of Total
<b>AREA 1</b>	<b>6,330</b>	<b>18.7??</b>
Imuvik	1,637	4.8%
Peel river	4,692	13.9%
<b>AREA 2</b>	<b>23,894</b>	<b>70.7%</b>
Enterprise	5,301	15.7??
Fort Smith	575	1.7%
Ft. Providence	6,485	19.2%
Ft. Simpson	19s	0.6%
Hay River	1,050	3.1%
Liard	3,056	9.0??
Yellowknife	7,228	21.4%
<b>AREA 3</b>	<b>3,584</b>	<b>10.6%</b>
Cambridge Bay	271	0.8%
Iqaluit	2,430	7.2??
Rankin Inlet	884	26%
<b>TOTAL</b>	<b>33,808</b>	<b>100%</b>

### Visitor Distribution by Area



### Visitors by Mode and Purpose



SOURCE: 1994 NWT Exit Survey, Planning section, PPHR, Economic Development & Tourism, March 1995.

## Visitor Income

Overall, visitors reported relatively high family incomes. Most visitors indicated family incomes in the range of \$40- \$60 thousand. This pattern holds true for all three area destinations. A larger proportion of visitors to the Eastern Arctic reported in the three top income categories than visitors to other destinations.

### Visitor Income - 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
<b>Total</b>	<b>2,799</b>

## Visitor Expectations

Visitors to the Eastern Arctic (56%) were most likely to feel that their visit had exceeded their expectations.

Respondents	Exceeded	% of Total	Met	% of Total	Not Met	% of Total
1,249	703	56.3%	498	39.9%	48	3.8%

## Visitor Employment

Visitors to the Eastern Arctic were most likely to report that they were professionals (19%A) while visitors to the South Mackenzie were most likely to say that they were retired, ( 19%).

Respondents	Parties	% of Total
Employed	1,426	49.2%
Self-employed	470	16.2%
Professional	547	18.9%
Retired	228	7.9%
Student	192	6.6%
Other	23	0.8%
Not applicable	12	0.4%

## Activities

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

Activity	Number	% of Total
Airplane Rides	0	0.0%
Canoeing/Boating	123	12.5%
Community Tours	226	22.9%
Cultural	16	1.6%
Fishing	160	16.2%
Hiking	154	15.6%
Historical	72	7.3%
Hunting	10	1.0%
Naturalist	128	13.0%
Other	43	4.4%
Photography	55	5.6%

## Travel Influences

The most important influencer of travel to the NWT was the desire to visit family and friends. **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 Demster Highway (28.5%) and the Eastern Arctic (20.5%)

**Responses** indicate that magazine articles present a relatively **more effective influence on potential travelers than magazine advertisements, or "other ads"**. The focus of investment in this campaign may warrant further study.

### Factors Which Influenced Travel - Area 3

Factor	Number	% of Total
Friends/Relatives	565	35.6%
To See the Arctic	326	20.5%
Other	243	15.3%
Word of Mouth	107	6.7%
On the Map	57	3.6%
Other ads	50	3.1%
Lived here Before	50	3.1%
1-800#	20	1.3%
Travel Agent	20	1.3%
Explorers' Guide	18	1.1%
Outdoor/Sports show	12	0.8%
Fishing/Hunting	13	0.8%

## Rating of Attractions

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, Hiking/sightseeing/camping, and native culture.

## Rating of Services

A greater proportion of visitors to the Eastern Arctic gave excellent ratings to arts and crafts selections than visitors to other destinations. 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 to all areas. 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 may reflect unsatisfied demand.

## Average Length of Stay

Traveler	Avg. length of Stay
Leisure	14 days
Business	11 days
Employment	28 days

## When did Visitors Decide to Visit the Northwest Territories

On average, a visitor to the NWT made the decision to visit about five and half months prior to traveling. This lag time between decisions and travel was very similar for South Mackenzie and Eastern arctic visitors.

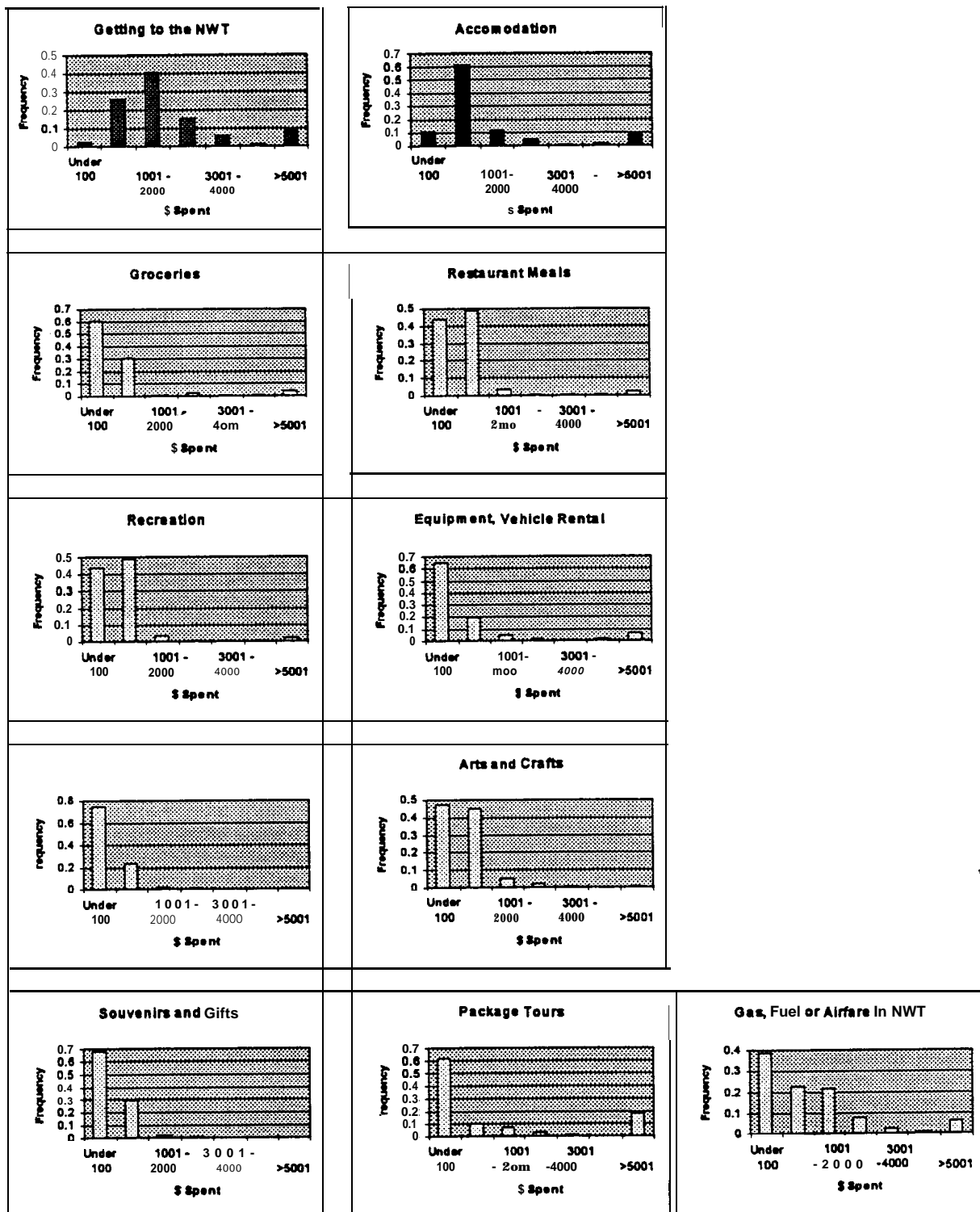
## Visitor Expenditures

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.

## Number of Visitors

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. In 1989 there were 4,711 air travelers to the Eastern Arctic, and in 1994 there were 5,052 air travellers, -a 7.3% increase.

# Frequency of Visitor Spending by Category, Eastern Arctic Visitors



SOURCE: 1994 NWT Exit Survey, Planning Section PPHR., Economic Development & Tourism, March 1995.

## **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.

## **Visitor Destinations**

11.2% visited the Eastern Arctic in 1989, and in 1994 there was a drop to 10.6%.

## **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.

## **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 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.

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. Business travelers may be persuaded to expand their stay to pursue leisure activities.

Visitors to the Eastern Arctic were much more likely to believe that their overall trip surpassed what they had been expecting. 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.

[Insert page 34 of the survey]

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 the tour. This pattern was especially pronounced in 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 in influencing the travel decision. 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 travelers, where travellers 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 1992<sup>6</sup>. Between 1989 and 1992, the number of air travelers declined by over 20%. Indicators for ferry traffic generally show an

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<sup>6</sup> 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. The investment in the print media campaign should be re-examined given the indications that magazine articles about the NWT have a much greater impact on travel intentions than advertisements.**