

**Government of the Northwest Territories
Park Usage Report**

August 1, 2008

kisquared



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Introduction

Background

The Government of the Northwest Territories (GNWT), through the Department of Industry, Tourism and Investment (ITI), has a mission to provide quality programs and services to support economic prosperity and community self-reliance in the Northwest Territories (NWT). To further its mission, ITI retained **kisquared** to conduct a survey of resident and non-resident 2007 campground users. This telephone survey captured information about camper preferences, opinions on potential pricing and discounts, feedback about the online reservation booking system and overall usage of NWT campgrounds.

Objectives

The primary objectives of the camp user study are:

- To gauge the use of and satisfaction with the online reservation booking system;
- To determine campsite users' preferred reservation methods;
- To determine the preferred proportion of campsites for extended stay;
- To measure preferred use of extended stay campsites;
- To test the viability of various pricing options for powered and non-powered campsites;
- To determine user perspectives on campsite rate discounts; and
- To highlight differences between residents and visitors using campsites in the NWT.

Methodology

- In preparation for fielding the survey, GNWT project personnel provided **kisquared** with the 2007 Northwest Territories park permit database. The sample manager removed duplicate contacts and overseas contacts from the sample prior to fielding.
- All interviews were conducted in **kisquared**'s in-house custom-built call centre. A total of 785 interviews were conducted, 418 with residents and 367 with visitors. Interviewing began on June 25, 2008 and was completed on July 12, 2008.
- During fielding, respondents' answers were recorded directly onto hard-copy questionnaires, and then entered using industry-standard software. Trained and experienced data entry operators keyed each survey's data into two separate files. Both data files were then error-checked by electronically comparing them to each other. Any discrepancies in the data were automatically identified, and were resolved by the **kisquared** operators from the original hard-copy questionnaire.

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Data analysis

Frequency and descriptive statistics were run and reported on where appropriate. Variables were then recoded, with categories collapsed or excluded in some cases (a necessary step for testing using *chi*-square analysis), and cross-tabulated with other variables, with those cross-tabulations tested for statistical significance. Where possible, each variable was cross-tabulated with each of the following variables:

- Respondent type (NWT resident or NWT visitor);
- Whether respondent supports or opposes extended stay campsites;
- Casual and frequent campers;
- Whether respondent believes the main purpose of NWT campgrounds should be providing accommodations and services primarily to NWT residents, NWT visitors, or give equal priority.

At ITI's request, additional cross-tabulations were run for certain questions with the following variables:

- Usage of the Online Reservation System
- Campers who stayed at Reid Lake *or* Prelude Lake Territorial Parks
- Campers who stayed at Reid Lake *and* Prelude Lake Territorial Parks

Prior to data analysis being undertaken, 2007 NWT camping permits database was supplied to kisquared in order to weight the results based on region, type of campsite permit and NWT vs non-NWT residency. The weighting multipliers were developed by using the three variables and taking into the consideration party size to more accurately reflect the total number of unique campers in 2007.

Reporting

This report presents all relevant and significant findings revealed by the analyses described above. Where significant, cross-tabulation data has been discussed in the body of the report under the relevant sections. Respondent groups that have a bias toward or against certain responses relative to respondents in other segments are listed as such alongside each response variable. Where frequencies are reported (usually in charts and tables), responses of “don’t know” and *refusals* are excluded unless otherwise indicated.

Terminology

The following terms are used throughout this report:

- **NWT Residents** refers to individuals who live in the NWT and purchased a 2007 Northwest Territories park permit, and participated in a telephone interview about their camping experience in the NWT.
- **NWT Visitors** refers to all non-NWT residents who purchased a 2007 Northwest Territories park permit, and participated in a telephone interview about their camping experience in the NWT.
- **Campers** refers to everyone (residents and non-residents) represented in this study. This includes all individuals who purchased a 2007 Northwest Territories park permit and participated in a telephone interview about their camping experience in the NWT.
- **Frequent campers** are those who camped in the NWT at least 5 times in 2007.
- **Casual campers** are those who in the NWT 4 or fewer times in 2007.
- **ORS users** are campers who have used the Online Reservation System (ORS) at least once previously.
- **Extended stay supporters** are those campers who believe that extended stay campsites should be offered at public campgrounds in the NWT, while **extended stay dissenters** are those who believe that they should not.

Report organization

This report consists of the following sections:

- *Introduction* (objectives, methodology, reporting);
- *Executive summary* (key findings);
- *Trip characteristics* (study findings);
- *Park usage* (study findings); and
- *Campground user profile* (study findings).

Executive summary

Online reservation system

- While booking online is popular – it is the preferred reservation system of one-third of campers – it is not for everyone, as a considerable proportion (41%) continues to prefer both telephone and in-person over online channels.
- NWT residents prefer using the Online Reservation System (ORS) for reserving campsites, while NWT visitors prefer reserving in-person.
- Satisfaction of the services provided by the ORS is high, with 68% of campers either somewhat or very satisfied. It is interesting to note that while NWT residents are more likely to use the ORS, they are *less* likely to report satisfaction with the service than are visitors.
- One-half (52%) of ORS users are satisfied with the value for money it provides. However, NWT residents are *less* likely to report satisfaction with ORS's value for money than are NWT visitors.
- On average, ORS users rate the system's service (3.76 out of 5) higher than its value for money (3.30). Both metrics are higher among visitors than residents.
- Two-fifths (40%) of campers feel a reservation system for NWT parks is valuable for them. NWT residents rate the value of the ORS more highly than NWT visitors.
- Cost is not a barrier for non ORS users: only 1% report not using the ORS due to high fees.

Increasing options for extended stay camping

- Nearly 2 in 5 NWT residents believe that the main purpose of NWT campgrounds should be about providing services to NWT residents, as opposed to providing services to NWT visitors or equally to all users.

Availability

- There is moderate support for the availability of extended stay campsites at public parks in the NWT (54%). NWT residents are *more* likely than NWT visitors to support extended stay campsites in general.

Location

- Support is highest for offering extended stay camping in the two parks that currently offer the option: Prelude Lake Territorial Park (24%) and Reid Lake Territorial Park (22%). NWT residents are more likely than NWT visitors to suggest extended stay camping at these parks.
- Campers express the most opposition to offering extended stay camping in Fred Henne Territorial Park. This opposition is stronger among NWT residents than NWT visitors.

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Length of stay

- Currently, extended stay camping in the NWT is available for the full season only. Campers support a change in this policy: 47% say the NWT should allow extended stays for less than 16 weeks, compared to only 18% who say they should not. NWT visitors express greater support for such a change.
- NWT may consider reducing the length of time required for extended stay bookings to five weeks or less: of those who support flexibility in the length of extended stay camping, close to one-half (48%) say three to four weeks should qualify as an extended stay, with an average response of five weeks.

Proportion of campsites

- *NWT parks in general:* Support for this policy is mixed: thirty percent of campers believe that 30% or fewer campsites should be allocated for extended stay camping for the full season, while a similar proportion (28%) feel no extended stay camping should be allowed. A further 14% would like to see more than 30% of campsites allotted for extended stays. NWT residents express greater support: they are *more* likely to say more than 20% of park campsites should be allocated exclusively for extended stay camping and are *less* likely to say there should be no such campsites.
- *Prelude Lake and Reid Lake Parks:* The allocation of 30% of campsites at these two parks is seen as reasonable among campers: two-fifths (43%) feel this is a reasonable amount, while one-tenth say it is either too high (11%) or too low (10%). Note, however, that the remaining campers (36%) believe extended stays should not be allowed at any park. There is some evidence that NWT residents would like the current allocation of extended stay campsites at these two parks increased, as they are more likely than NWT visitors to say the current 30% is too low.

Fee policies

Discounts

- There is support with offering discounted campsite rates to senior citizens (79%). The median suggested discounted is 15%.
- Campers support a reduced rate for extended stay campsites: 41% say extended stay campsites should be less than regular campsites, compared to 18% who say they should be the same and 7% who feel they should cost more.
- Offering a weekday camping discount is not recommended at this time, with only 36% support. The median suggested discount is 15%.
- Support for offering discounts for the entire season (52%), the shoulder season (46%), one month (46%) and one week (44%) is modest. Median suggested discounts are 20% for full season, shoulder season and one month camping, and 15% for one week camping.

- NWT visitors are more supportive of offering discounts in all tested categories than are NWT residents, except for weekday stays.

Optimal campsite price points

- Campers express greater price sensitivity for non-powered campgrounds, and show unwillingness to pay more than \$20 per night. The lowest price point tested (\$20 per night) will not only encourage a greater number of people to use the campgrounds; it will also generate greater revenue.
- Overwhelmingly, campers, especially NWT visitors, believe there should be a price difference between vehicle-accessible and walk-in non-powered sites.
- NWT can consider increasing the fee for powered campsites. Campers have relatively low price sensitivity for powered campsites: they are likely to pay for powered campsites even at higher price points of \$25 and \$30. Caution should be exercised, however, as NWT residents show slightly greater price-sensitivity, particularly in price increases from \$20 to \$25.

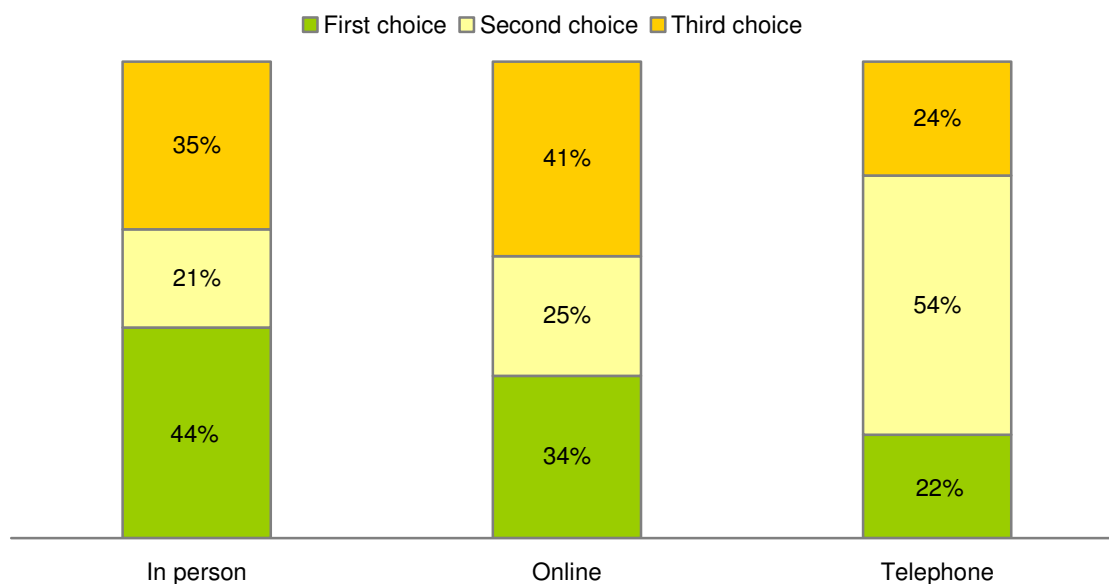
Trip characteristics

Reservations

Preferred reservation method

Campers were asked to rank the following three reservation methods: online, telephone and in-person. Campers' most common first choice is to reserve a campsite in person (44%). The second most common first choice is to book online (34%), though a considerable proportion ranks it as their third choice. Campers' most common second choice is booking by telephone (54%).

Figure 1 PREFERRED RESERVATION METHOD



Note: Data from Q6. Base: 774.

- Cross-tabulations reveal that NWT residents and ORS users are *more* likely to choose online booking as their highest preference.
- ORS users and campers who believe the main purpose of NWT campgrounds should be providing services for visitors are *less* likely to prefer telephone booking.
- Campers with the following characteristics are *more* likely to choose in-person booking first:
 - Extended stay dissenters;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for visitors; and
 - Non-ORS users.

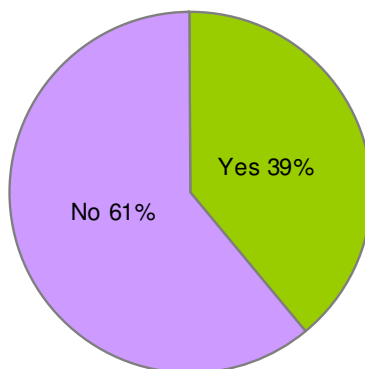
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Use of NWT Online Reservation System

Two-fifths (39%) of campers have used the ORS at least once prior to their interview.

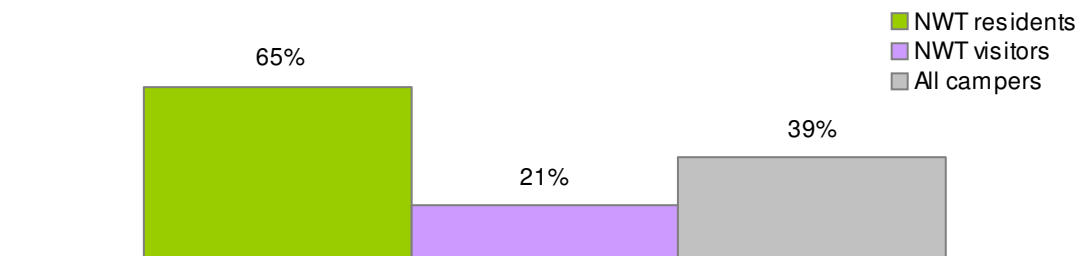
Figure 2 USED ONLINE RESERVATION SYSTEM



Note: Data from Q1. Base: 783.

- Cross-tabulations reveal that campers with the following characteristics are *more* likely to use the ORS:
 - NWT residents (see Figure 3 below);
 - Frequent campers; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services for residents.

Figure 3 ORS USAGE: NWT RESIDENT VS. NWT VISITOR



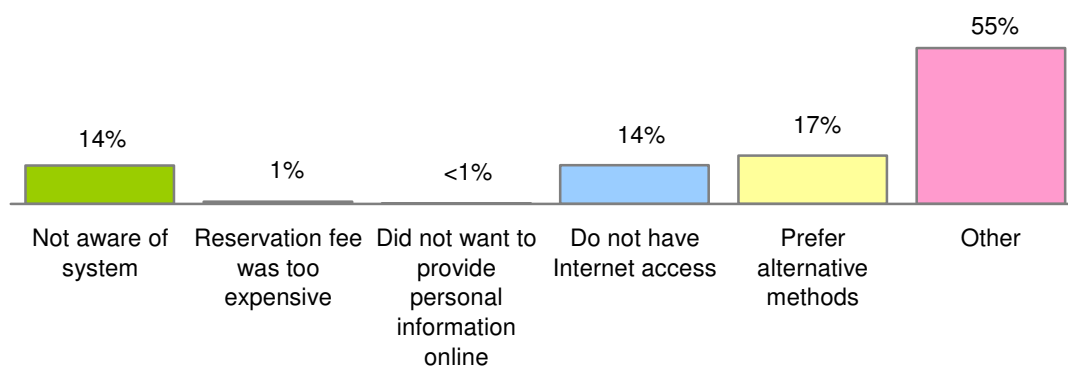
Note: Data from Q1. Base: 783.

Those who have never used the ORS were asked the reason why they had not. As shown in Figure 4, close to one-fifth (17%) prefer alternative methods. No statistically significant differences between camper segments were found for not using the ORS.

The survey did not quantitatively break down the 55% who responded with “other,” but this category primarily consists of four types of responses, listed in approximate order of frequency:

- The respondent did not use the ORS to book ahead of time because they did not know the exact date that they would be arriving or had no set trip itinerary;
- Someone else, such as a spouse or friend, used the ORS on the respondent’s behalf;
- The respondent did not use the ORS to book as they had a small travel party or were travelling in the off-season and, as a result, saw little risk in not booking in advance; and
- The respondent did not have a credit card with which to make online bookings.

Figure 4 REASONS FOR NOT USING THE ONLINE RESERVATION SYSTEM

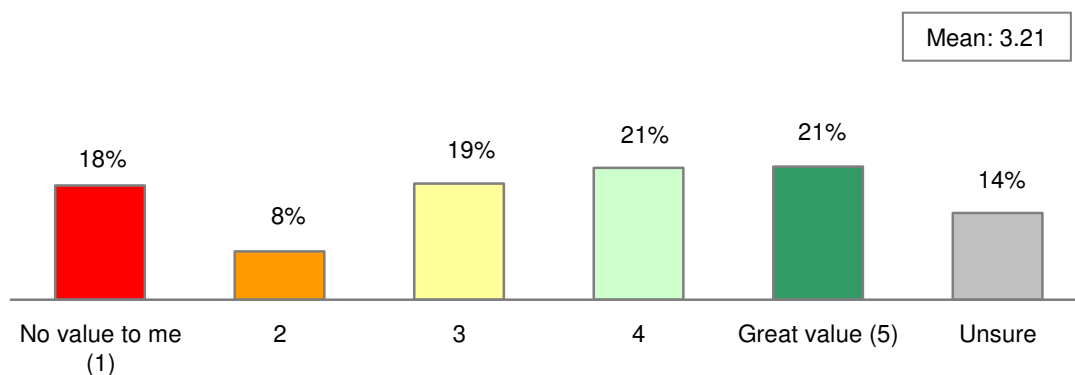


Note: Data from Q2. Base: 471.

Value of online reservation system

One-fifth (21%) of campers feel an Online Reservation System (ORS) has great value for them. However, a similar proportion (18%) also feels that such a system has no value to them.

Figure 5 VALUE OF ONLINE RESERVATION SYSTEM

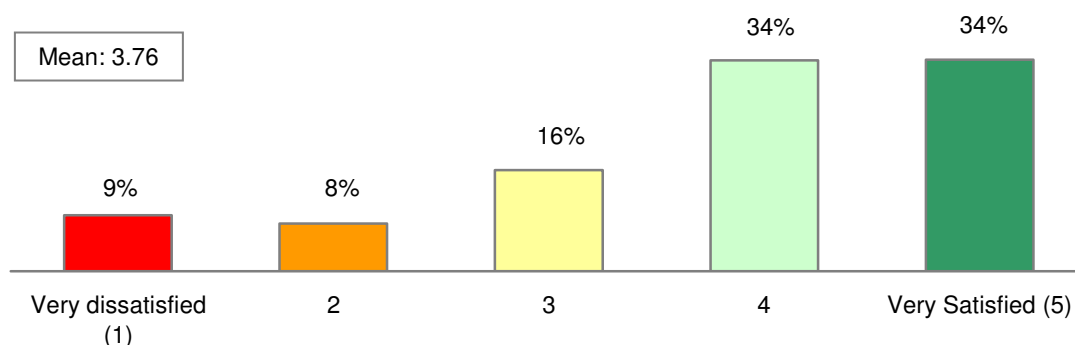


Note: Data from Q5.

- Campers with the following characteristics are *more* likely to rate the value an ORS higher:
 - NWT residents;
 - Frequent campers; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services for residents.
- Not surprisingly, users of the ORS are *more* likely to value the reservation system.

Two-thirds (68%) of campers who have used the ORS are satisfied with it (see Figure 6), with an average satisfaction score of 3.76 out of a maximum score of 5.

Figure 6 SATISFACTION WITH ONLINE RESERVATION SYSTEM SERVICE



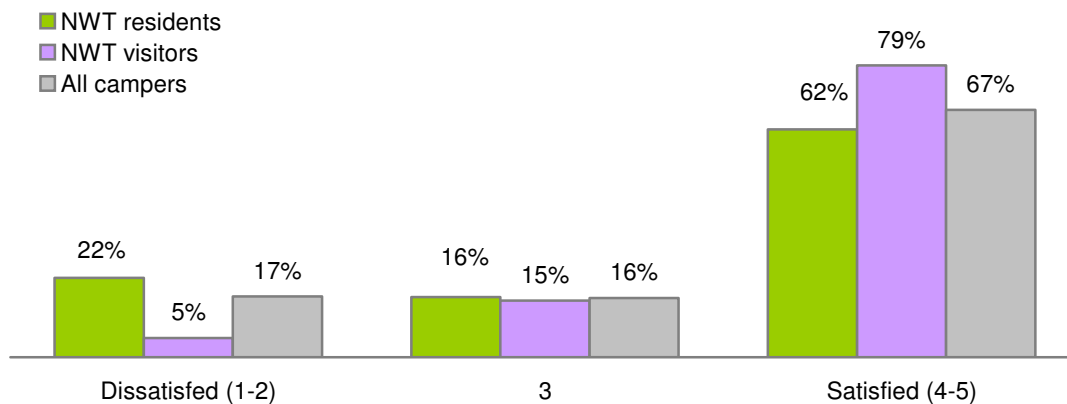
Note: Data from Q3. Base: 303.

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- Cross-tabulations reveal that NWT visitors are more likely to report satisfaction with the ORS than NWT residents (see Figure 7).

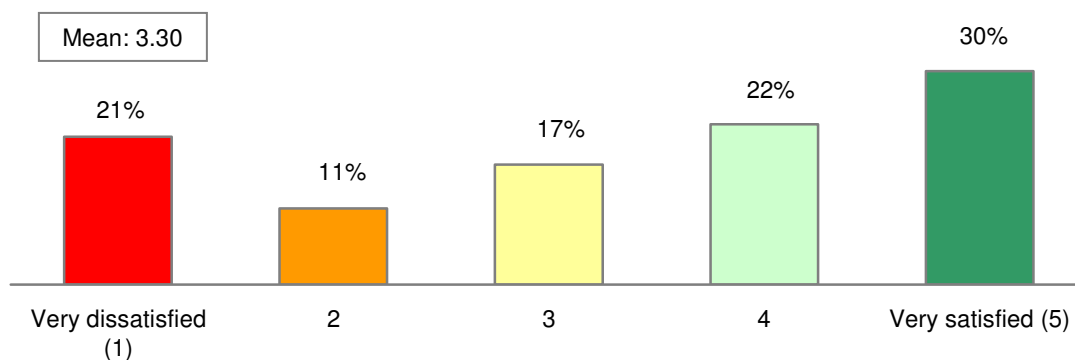
Figure 7 ORS SERVICE SATISFACTION: NWT RESIDENT VS. NWT VISITOR



Note: Data from Q3. Base: 303.

Campers were asked to rate their satisfaction with the value for money provided using a 1 to 5 scale where 1 represents very dissatisfied and 5 represents very satisfied. As Figure 8 shows, approximately one-half (52%) of campers who have used the ORS are satisfied with the value for money it provides (rating 4 or 5). However, one-third (32%) are dissatisfied (rating of 1 or 2) for a mean satisfaction score of 3.30.

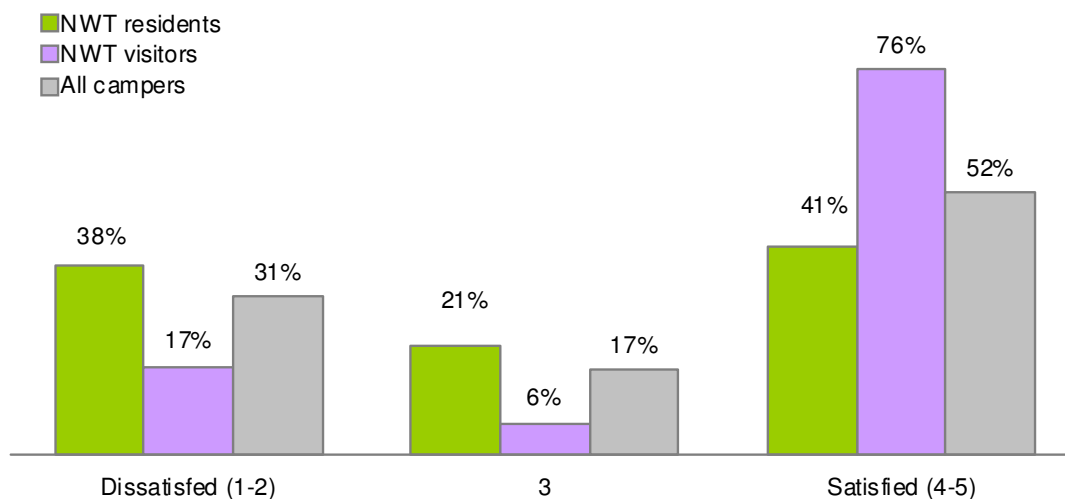
Figure 8 SATISFACTION WITH VALUE FOR MONEY



Note: Data from Q4. Base: 301.

- Cross-tabulations reveal that campers with the following characteristics are *more* likely to report satisfaction with the value for money provided by the ORS:
 - NWT visitors (see Figure 9);
 - Casual campers; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services equally for visitors and residents.

Figure 9 ORS VALUE FOR MONEY SATISFACTION: NWT RESIDENT VS. NWT VISITOR



Note: Data from Q4. Base: 301.

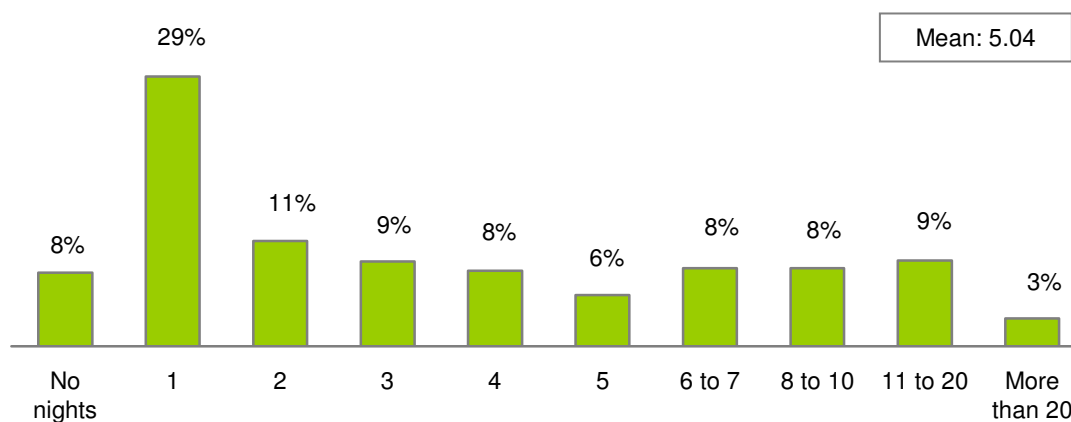
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Number of trips

One-third (34%) of campers are frequent campers who took five or more NWT camping trips in 2007. The majority (65%) are casual campers who took four or fewer trips. Data is displayed in Figure 10.

Figure 10 NUMBER OF CAMPING TRIPS



Note: Data from Q31. Base: 782.

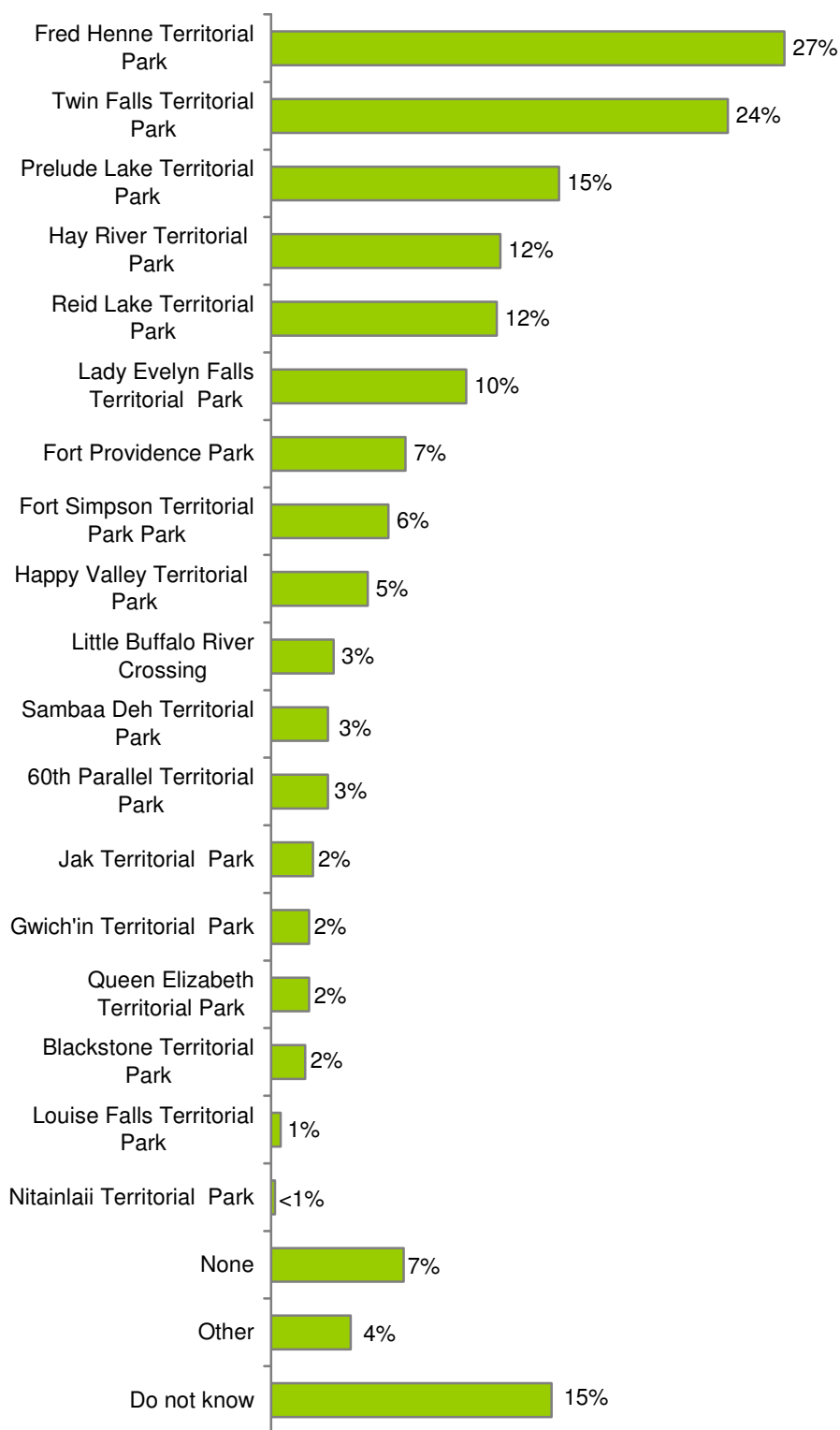
- Cross-tabulations reveal that NWT residents and campers who believe the main purpose of NWT campgrounds should be providing services for residents tend to be more frequent campers than non-residents and other campers, respectively.

Park usage

One-quarter (27%) of campers stayed at Fred Henne Territorial Park in the 2007 season. Twin Falls Territorial Park (24%) was the second most popular destination, followed by Prelude Lake Territorial Park (15%) and Hay River and Reid Lake Territorial Parks (12% each). See Figure 11 (next page) for the full breakdown.

- Cross-tabulations reveal that frequent campers are more likely than infrequent campers to use the following parks: Fred Henne, Hay River, Prelude Lake, Reid Lake, and Twin Falls.
- NWT residents are more likely than NWT visitors to use Fred Henne, Prelude Lake, and Reid Lake Territorial Parks. Meanwhile, visitors are more likely than residents to use Hay River and Twin Falls Territorial Parks.
- Campers who believe the main purpose of NWT campgrounds should be providing services for residents are more likely to use Prelude Lake and Reid Lake Territorial Parks, while those who believe that their main purpose should be providing services for visitors are more likely to use Twin Falls Territorial Park.
- Extended stay supporters are more likely to use Reid Lake Territorial Park, while extended stay dissenters are more likely to use Twin Falls Territorial Park.

Figure 11 OVERNIGHT CAMPGROUND STAYS



Note: Data from Q32.

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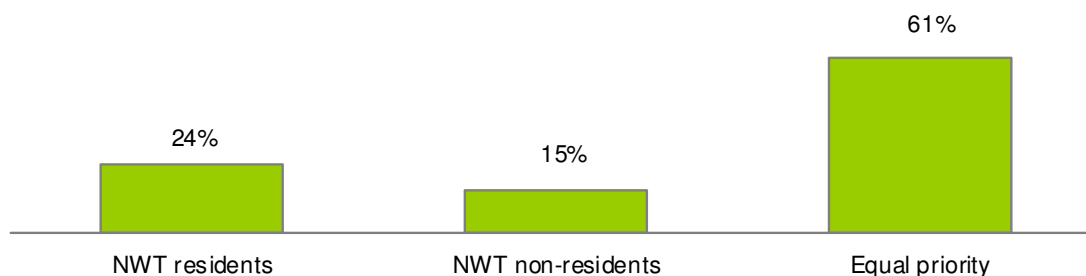


Park usage

Main purpose of NWT campgrounds

One-quarter (24%) of campers believe the main purpose of NWT campgrounds should be providing accommodations and services for NWT residents. However, three-fifths (61%) believe equal priority should be given to both NWT residents and NWT visitors.

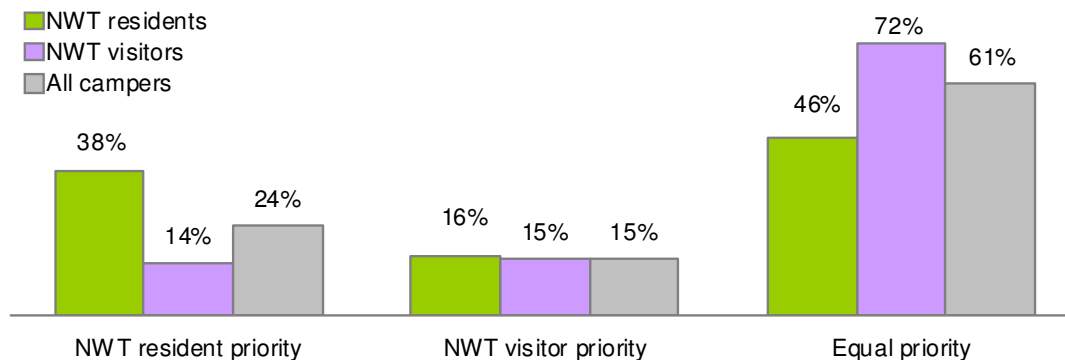
Figure 12 NWT CAMPGROUNDS SHOULD BE PROVIDING ACCOMMODATIONS AND SERVICES PRIMARILY FOR...



Note: Data from Q34. Base: 769.

- Cross-tabulations reveal that NWT residents (see Figure 13) and frequent campers are more likely to believe the main purpose of NWT campgrounds should be providing services to NWT residents.
- NWT visitors are *more* likely to believe the main purpose of NWT campgrounds should be providing services equally to NWT residents and NWT visitors (see Figure 13).

Figure 13 MAIN PURPOSE OF NWT CAMPGROUNDS: NWT RESIDENT VS. NWT VISITOR

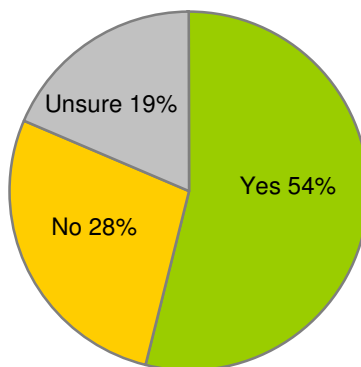


Note: Data from Q34. Base: 769.

Extended stay campsites

Three-fifths (59%) of campers think extended stay campsites should be offered at public campgrounds in the NWT, while one-quarter (26%) think they should not (see Figure 14).

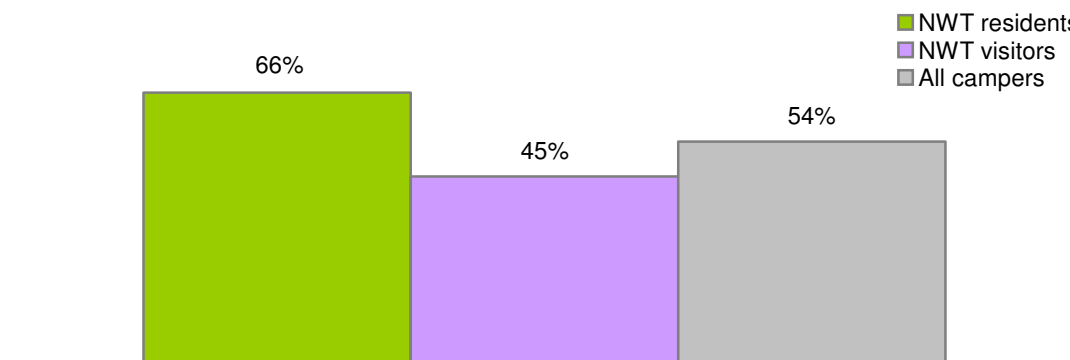
Figure 14 SHOULD NWT OFFER EXTENDED STAY CAMPSITES



Note: Data from Q7. Base: 639.

- Cross-tabulations reveal that campers with the following characteristics are *more* likely to support extended stay campsites:
 - NWT residents (see Figure 15);
 - Frequent campers; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services for residents.
- Campers who feel the main purpose of NWT campgrounds should be providing services to visitors are *less* likely to support extended stay campsites.

Figure 15 SUPPORT EXTENDED STAY CAMPSITES: NWT RESIDENT VS. NWT VISITOR



Note: Data derived from Q7.

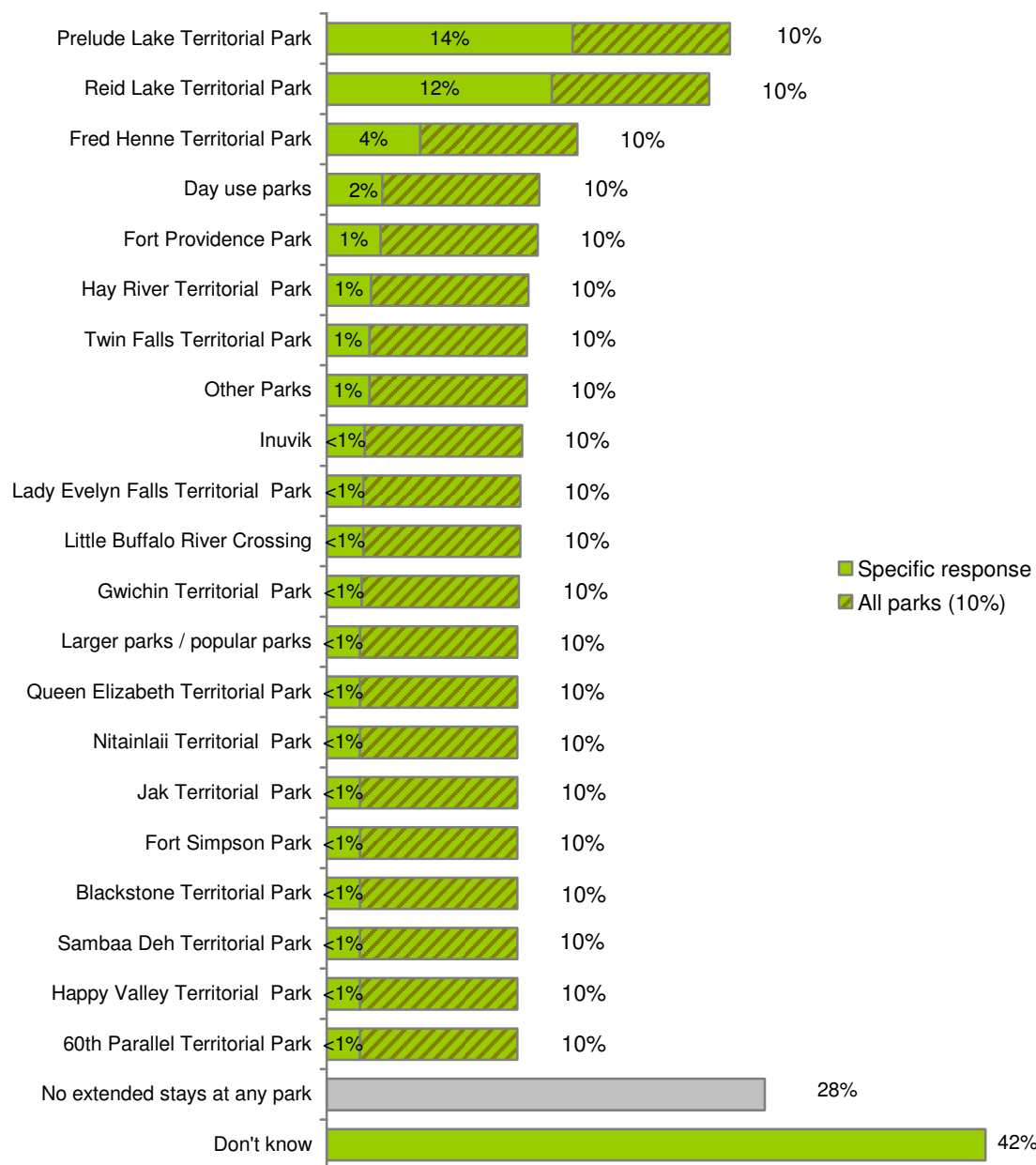
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Logistics of extended stay campsites

One in ten (10%) campers think all public NWT campgrounds should offer extended stay camping for the full season (see Figure 16). Among those who singled out campgrounds for extended stay, mentions of Prelude Lake (14%) and Reid Lake (12%) Territorial Parks were most common.

Figure 16 CAMPSITES THAT SHOULD OFFER EXTENDED STAY

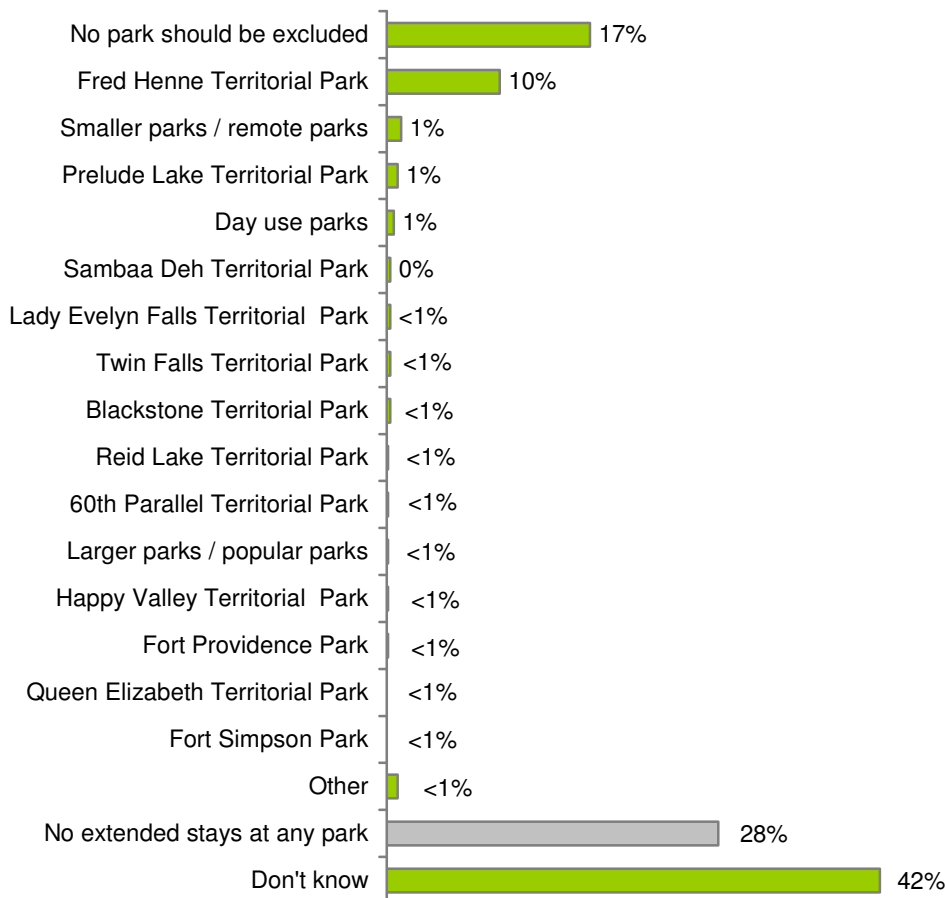


Note: Data from Q8.

- Cross-tabulations reveal that campers who support extended stay campsites are *more* likely to suggest extended stay camping be available for the full season at Fred Henne Territorial Park.
- Campers with the following characteristics are *more* likely to suggest extended stay camping at Prelude Lake:
 - NWT residents;
 - Frequent campers;
 - Extended stay supporters;
 - Campers who feel the main purpose of NWT campgrounds should be providing services to residents; and
 - Campers who have stayed overnight at Prelude Lake Territorial Park, Reid Lake Territorial Park, or both parks.
- Campers who are *less* likely to agree Prelude Lake should offer extended stay campsites have the following characteristics:
 - NWT visitors;
 - Extended stay dissenters; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services for visitors.
- Campers who are *more* likely to agree Reid Lake Territorial Park should offer extended stay campsites have the following characteristics:
 - NWT visitors;
 - Extended stay supporters;
 - Frequent campers;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for residents; and
 - Campers who have stayed overnight at Prelude Lake Territorial Park, Reid Lake Territorial Park, or both parks.

When asked if there are any parks that should *not* offer extended stay camping, 17% of campers stated that all parks should offer extended stay camping. However, one-tenth (10%) think Fred Henne Territorial Park should not have any extended stay campsites (see Figure 17).

Figure 17 PARKS THAT SHOULD NOT HAVE EXTENDED STAY CAMPSITES



Note: Data from Q10.

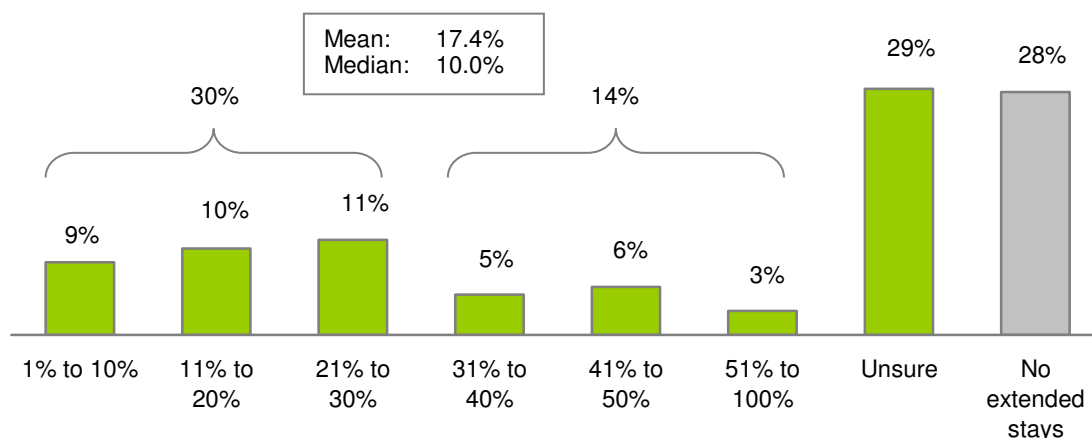
- Cross-tabulations reveal that frequent campers are *more* likely to feel all parks should offer extended stay campsites.
- Campers with the following characteristics are *more* likely to feel Fred Henne Territorial Park should not have extended stay campsites:
 - NWT residents;
 - Extended stay supporters;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for NWT residents; and
 - Campers who have stayed overnight at Reid Lake Territorial Park but *not* Prelude Lake Territorial Park.

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Campers were asked what proportion of campsites should be allocated exclusively for extended stay camping for the full season. The results are shown in Figure 18. Three in ten (30%) say 30% or fewer campsites should be allocated for extended stay camping for the full season. A similar proportion (28%) feel no campsites should be allocated for extended stay camping.

Figure 18 PROPORTION OF CAMPSITES ALLOCATED FOR EXTENDED STAY

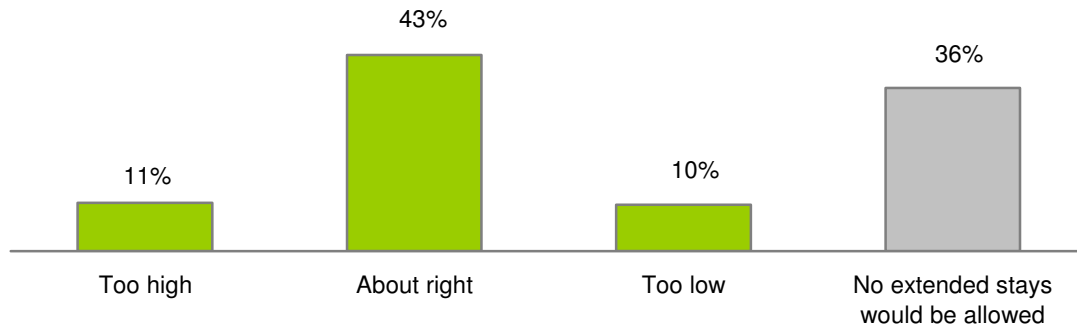


Note: Data from Q9.

- Campers who believe the main purpose of NWT campgrounds should be providing services for NWT visitors are *more* likely to say no campsites should be allocated exclusively for extended camping for the full season.
- Campers who have stayed overnight at Reid Lake Territorial Park (including those who stayed at both Reid Lake and Prelude Lake Territorial Parks) are *less* likely to say that no campsites should be allocated exclusively for extended camping for the full season.
- Visitors and campers who have stayed overnight at both Prelude Lake and Reid Lake Territorial Parks are *more* likely to say 1% to 20% of campsites should be allocated exclusively for extended stay camping:
- NWT residents and campers who have stayed at Reid Lake Territorial Park (including those who have also stayed at Prelude Lake Territorial Park) are *more* likely to say 21% to 30% of campsites at parks should be allocated exclusively for extended stay camping:
- Campers with the following characteristics are *more* likely to say greater than 31% of park campsites should be allocated exclusively for extended stay camping:
 - NWT residents;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for NWT residents; and
 - Campers who have stayed overnight at one of Reid Lake Territorial Park or Prelude Lake Territorial Park.

Campers were informed that approximately 30% of the campsites at Prelude Lake and Reid Lake Parks have been allocated for extended stay bookings. They were asked if they felt this percentage was too high, about right, or too low. Of those who have an opinion on the subject, more than two-fifths (43%) feel this allocation is appropriate.

Figure 19 AMOUNT OF EXTENDED STAY CAMPSITES AT PRELUDE AND REID LAKE



Note: Data from Q11. Base: 603.

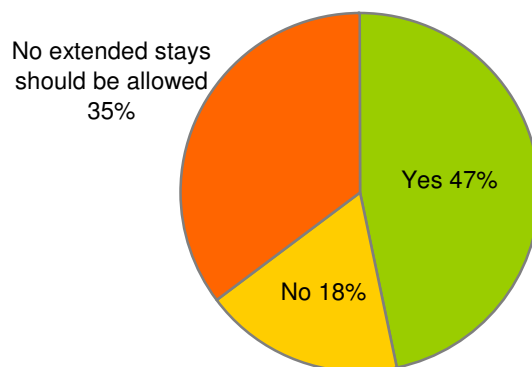
- Campers with the following characteristics are *more* likely to feel that the current allocation of extended stay campsites at Prelude Lake and Reid Lake Territorial Park is too high:
 - NWT visitors (see Figure 21);
 - Frequent campers;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for NWT residents; and
 - Campers who have stayed overnight at both Prelude Lake Territorial Park and Reid Lake Territorial Park.
- Campers with the following characteristics are *more* likely to feel the current allocation of extended stay campsites at Prelude Lake and Reid Lake Territorial Park is about right:
 - NWT visitors;
 - Casual campers;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for NWT visitors or equally to NWT residents and NWT visitors; and
 - Campers who have not stayed overnight at Prelude Lake Territorial Park or Reid Lake Territorial Park.
- Campers with the following characteristics are *more* likely to feel the current allocation of extended stay campsites at Prelude Lake and Reid Lake Territorial Park is too low:
 - NWT residents;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for NWT residents; and
 - Campers who have stayed overnight at Prelude Lake Territorial Park, Reid Lake Territorial Park, or both parks.

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Campers were asked if extended stay campsites should be available for shorter durations than the 16-week full season. One-fifth (18%) feel only full season extended stay offerings should be available, while one-half (47%) are in favour of the option of booking stays for shorter durations.

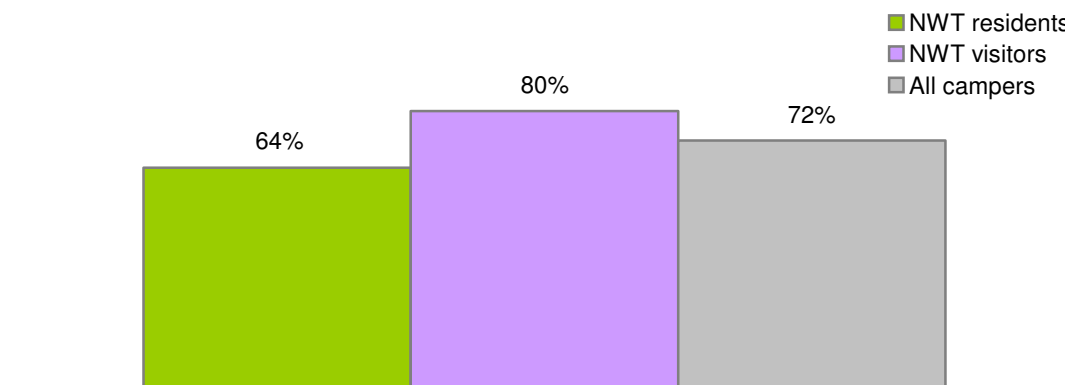
Figure 20 EXTENDED STAYS FOR LESS TIME THAN THE FULL SEASON



Note: Data from Q12. Base: 611.

- Campers with the following characteristics are *more* likely to say NWT parks should allow extended stays for periods shorter than the full season:
 - NWT visitors;
 - Casual campers;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for visitors; and
 - Campers who have not stayed overnight at Reid Lake Territorial Park or Prelude Lake Territorial Park.

Figure 21 SUPPORT EXTENDED STAYS FOR LESS TIME THAN THE FULL SEASON: NWT RESIDENT VS. NWT VISITOR



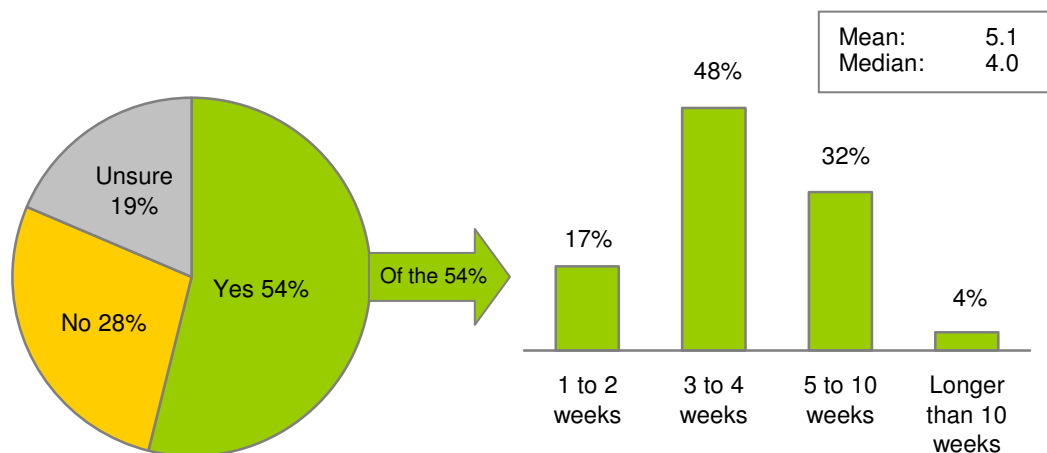
Note: Data derived from Q12. Base: 611.

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Campers who feel that extended stay bookings of less than 16 weeks should be offered at public campsites in the NWT were asked how many weeks should be allowed. One-half (48%) feel that 3 to 4 weeks is sufficient duration for an extended stay.

Figure 22 NUMBER OF WEEKS ALLOWED FOR EXTENDED STAYS



Note: Data from Q7 and Q13.

- Of campers who support extended stay campsites, those with the following characteristics are *more* likely to feel NWT parks should allow extended stays for 1 to 3 weeks:
 - NWT visitors;
 - Campers who have stayed overnight at both Reid Lake Territorial Park and Prelude Lake Territorial Park; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services for visitors.
- Of campers who support extended stay campsites, those with the following characteristics are *more* likely to feel that NWT parks should allow extended stays for 4 to 6 weeks:
 - NWT residents;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for both residents and visitors; and
 - Campers who have not stayed overnight at Reid Lake Territorial Park or Prelude Lake Territorial Park.
- Of campers who support extended stay campsites, those with the following characteristics are *more* likely to feel that NWT parks should allow extended stays for 7 to 16 weeks:
 - NWT residents;
 - Campers who believe the main purpose of NWT campgrounds should be providing services for NWT residents; and
 - Campers who have stayed overnight at either Reid Lake Territorial Park or Prelude Lake Territorial Park.

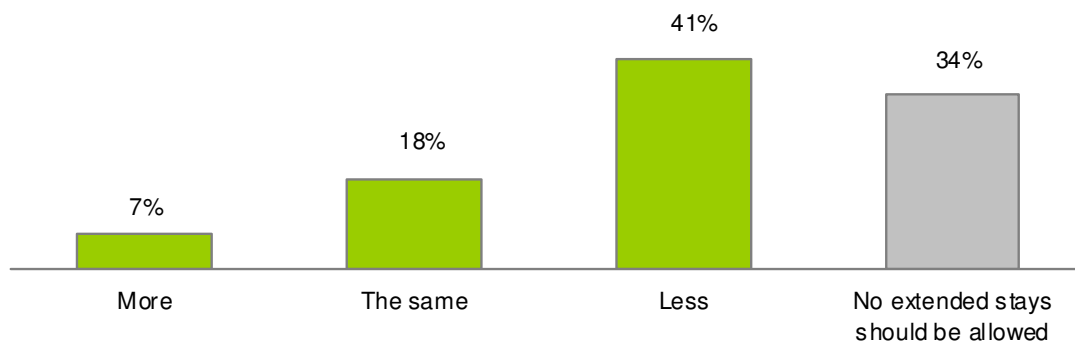
kisquared



Cost of extended stay campsites

Campers who feel extended stay campsites should be offered at public campsites in the NWT were asked if the cost of extended stay campsites should be more, less or the same as regular campsites. Two-fifths (41%) say extended stay campsites should cost less.

Figure 23 COST DIFFERENCE FOR EXTENDED STAY CAMPSITES



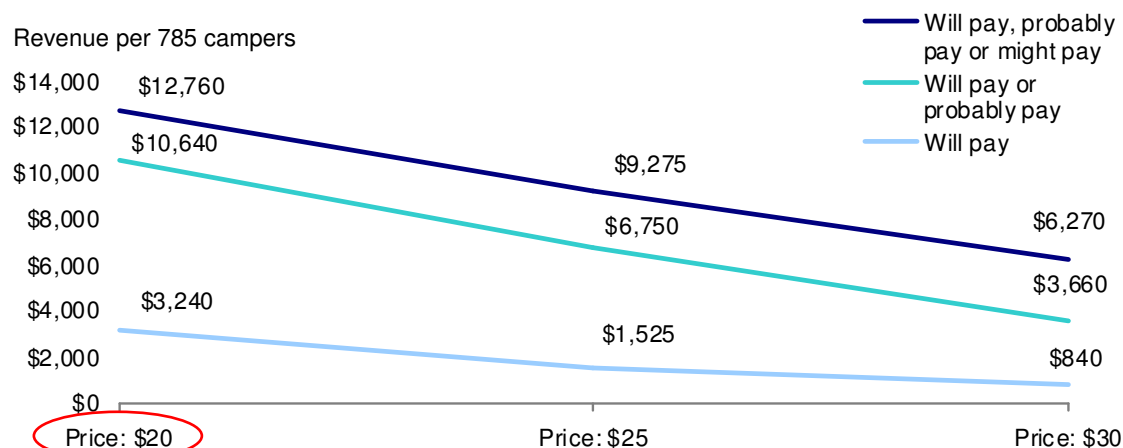
Note: Data from Q14. Base: 629.

Campsite fees

Non-powered campsites

Of those tested, the lowest price point of \$20 will generate the most revenue for non-powered campsites. Revenue is projected to decline as the price point increases, suggesting that non-powered campsite usage is relatively price-sensitive.

Figure 24 NON-POWERED CAMPSITES – PRICE POINTS

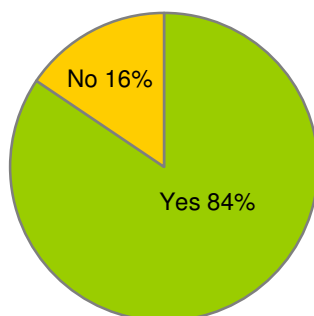


Note: Data from Q16A to Q18A and Q26B to Q28B.

- Campers who believe the main purpose of NWT campgrounds should be providing services for NWT visitors are *more* likely to pay \$30 for a non-powered campsite in the future.

Campers were informed of the different accessibility of the two kinds of non-powered campsites available at public parks in the NWT. They were then asked if the price for vehicle accessible and walk-in access campsites should be different. The majority (84%) feel the cost should be different.

Figure 25 DIFFERENT COST FOR VEHICLE ACCESSIBLE AND WALK-IN CAMPSITES?



Note: Data from Q19A and Q29B. Base: 756.

- Extended stay dissenters are *less* likely to say NWT parks should have different fees for vehicle accessible and walk-in access campsites.
- As shown in Figure 26, NWT visitors are *more* likely to say NWT parks should have different fees for vehicle accessible and walk-in access campsites.

Figure 26 DIFFERENT FEES FOR WALK-IN AND VEHICLE ACCESS NON-POWERED CAMPSITES: NWT RESIDENT VS. NWT VISITOR

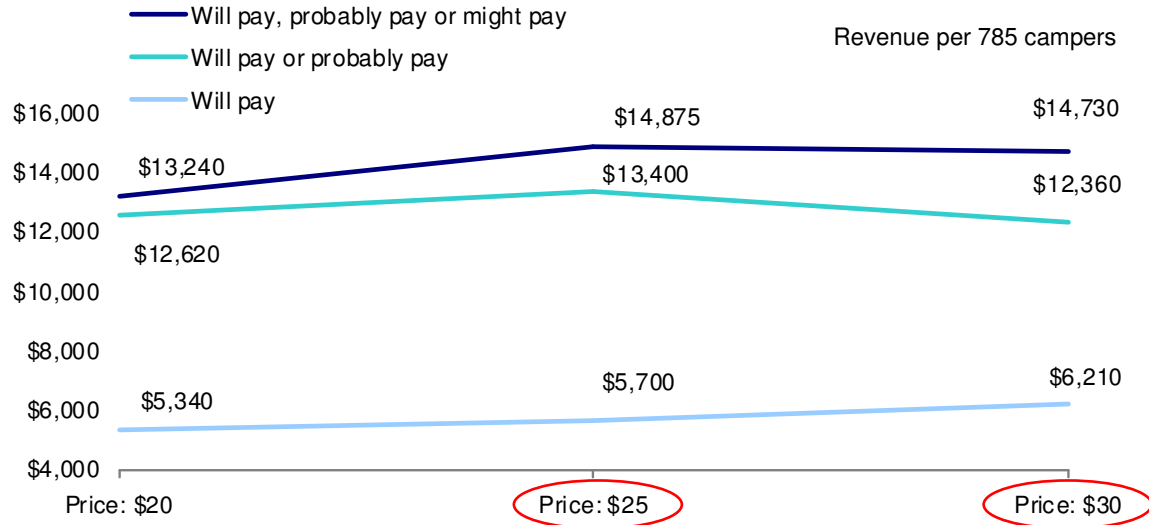


Note: Data from Q19A and Q29B. Base: 756.

Powered campsites

Campers have low price sensitivity for powered campsites and are likely to pay for powered campsites even at higher price points. Both the \$25 and \$30 price points will generate similar levels of revenue.

Figure 27 POWERED CAMPSITES



Note: Data from Q20A to Q22A and Q23B to Q25B.

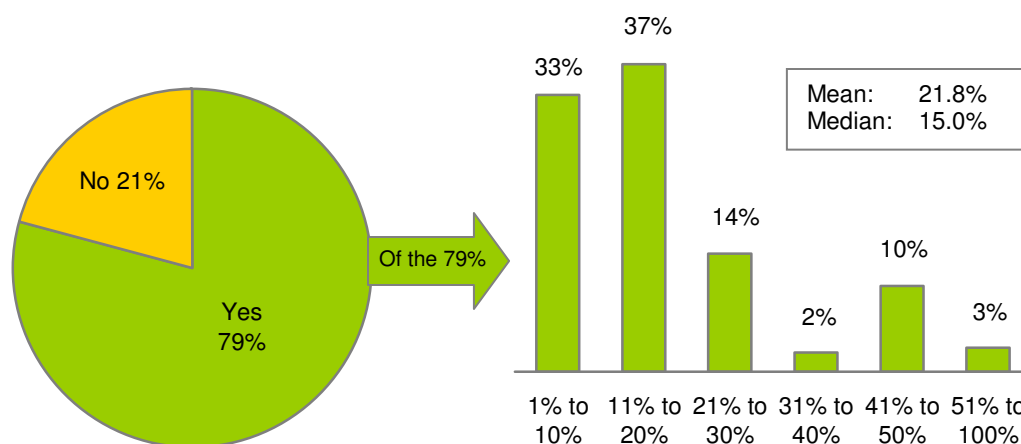
- NWT residents show some price sensitivity compared to visitors: when the price is increased from \$20 to \$25, the number of resident potential buyers declines by 16%, compared to 6% among visitors. Nevertheless, revenue curves rise among both groups with the \$5 price increase.

Camping discounts

Discounts for senior citizens

Campers were asked if they agree discounts should be offered for senior citizens. Eighty percent feel there should be some level of discount for this group. Seventy percent of those who feel senior citizens should receive a discounted campsite rate suggest it be 20% or less. The median suggested discount is 15%.

Figure 28 DISCOUNTS FOR SENIOR CITIZENS



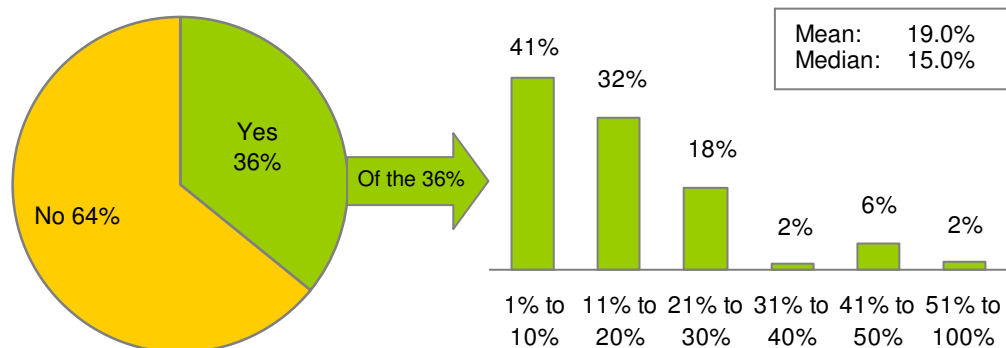
Note: Data from Q15. Base: 781.

- Of campers who favor discounts for senior citizens, those who are frequent campers are more likely to say NWT parks should offer up to a 20% discount.

Discounts for weekday camping

Campers were asked if they agree a discount should be offered for weekday campground stays. One-third (36%) feel there should be some level of discount for weekday camping. Three-quarters (73%) of those who feel weekday stays should receive a discounted rate on camping rates suggest it be 20% or less. The median suggested discount is 15%.

Figure 29 DISCOUNTS FOR WEEKDAYS



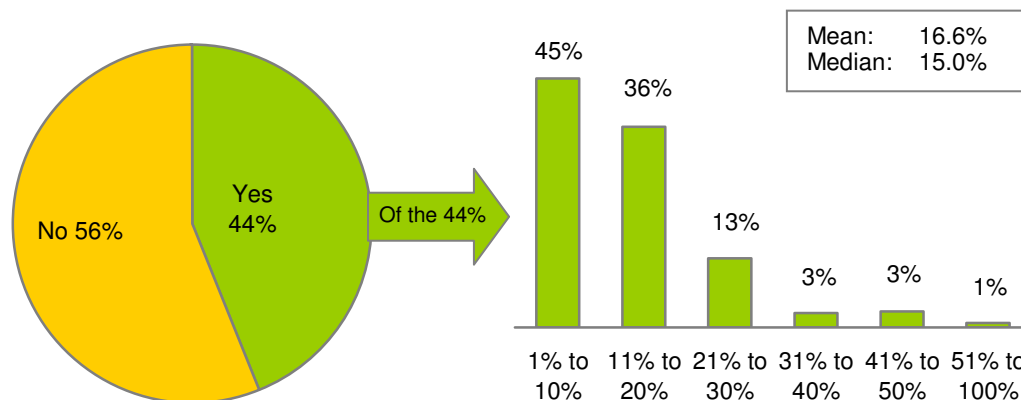
Note: Data from Q15. Base: 781.

- Campers who believe the main purpose of NWT campgrounds should be providing services for NWT residents are *more* likely to say NWT parks should offer a discount for weekday stays.
- Of campers in favour of weekday stay discounts, extended stay dissenters are *more* likely to be in favour of discounts greater than 21%.

Discounts for week-long camping

Campers were asked if they agree a discount should be offered for week-long campsite bookings. More than two-fifths (44%) feel there should be some level of discount for this duration. Four-fifths (81%) of those who feel week-long stays should receive a discounted rate on camping rates suggest it be 20% or less. The median suggested discount is 15%.

Figure 30 DISCOUNTS FOR ONE WEEK



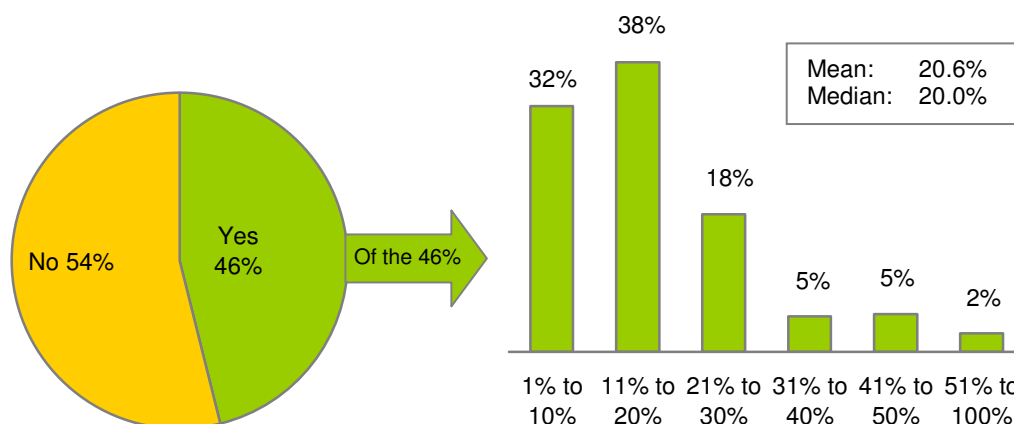
Note: Data from Q15. Base: 780.

- NWT visitors are *more* likely than residents to say NWT parks should offer a discount for week-long stays.
- Of those in agreement with discounts for one-week stays, campers with the following characteristics are *more* likely to suggest a discount greater than 20%:
 - Extended stay dissenters; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services for NWT visitors.

Discounts for month-long camping

Campers were asked if they agree a discount should be offered for month-long campsite bookings. Nearly one-half (46%) feel there should be some level of discount for this duration. Seven out of ten (70%) of those who feel month-long stays should receive a discounted camping rate suggest it be 20% or less. The median suggested discount is 20%.

Figure 31 DISCOUNTS FOR ONE MONTH



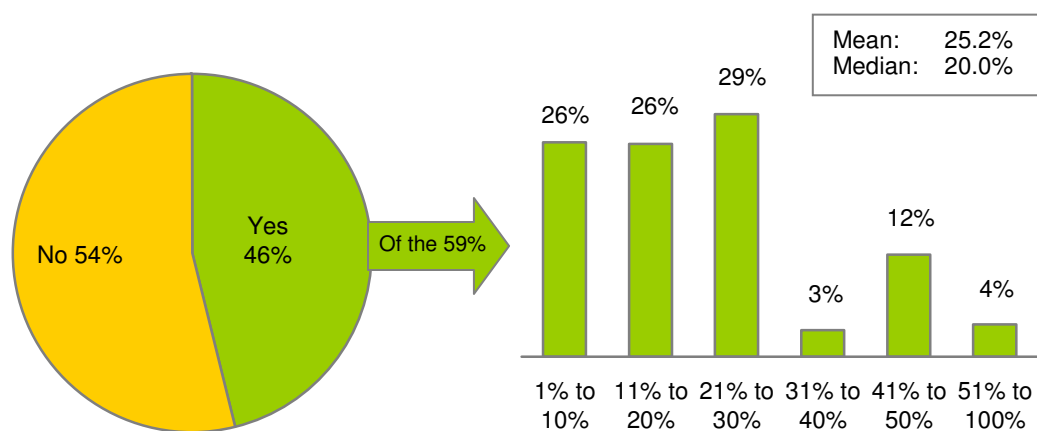
Note: Data from Q15. Base: 780.

- Extended stay dissenters are *less* likely to say NWT parks should offer a discount for month-long stays.
- Of campers that support discounts for month-long stays, those with the following characteristics are *more* likely to suggest a discount of up to 20%:
 - Frequent campers; and
 - Campers who believe the main purpose of NWT campgrounds should be providing services equally to NWT residents and NWT visitors.
- Of campers who support discounts for month-long stays, those who feel the main purpose of NWT campgrounds should be providing services to NWT residents are *more* likely to suggest that NWT parks should offer discounts of greater than 21%.

Discounts for shoulder season camping

Close to one-half (46%) of campers feel there should be some level of discount for shoulder season bookings. Four-fifths (81%) of those who feel shoulder season stays should receive a discounted rate suggest it be 30% or less. The median suggested discount is 20%.

Figure 32 DISCOUNTS FOR SHOULDER SEASON



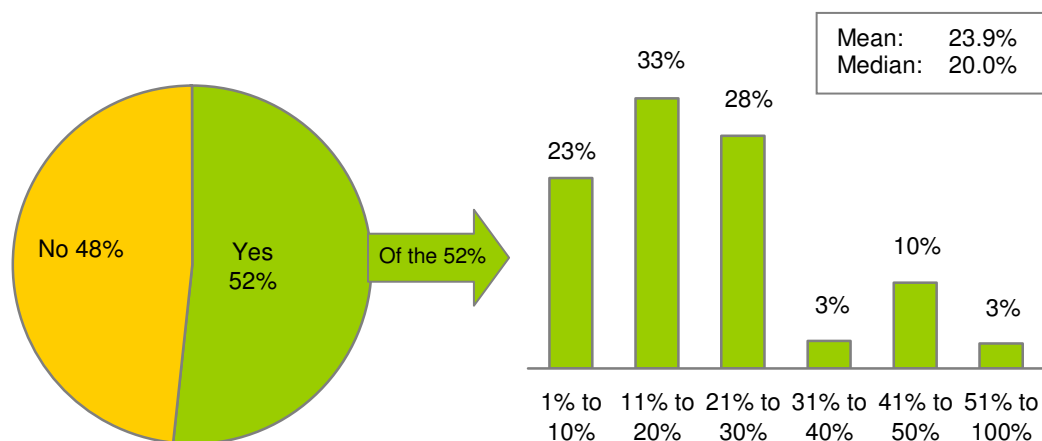
Note: Data from Q15. Base: 781.

- NWT visitors are *more* likely to say NWT parks should offer a discount for shoulder season stays.

Discounts for season-long camping

Campers were asked if they agree a discount should be offered for entire season bookings. One-half (52%) feel there should be some level of discount for this duration. More than four-fifths (84%) of those who feel complete season stays should receive a discounted rate suggest it be 30% or less. The median suggested discount is 20%.

Figure 33 DISCOUNTS FOR ENTIRE SEASON



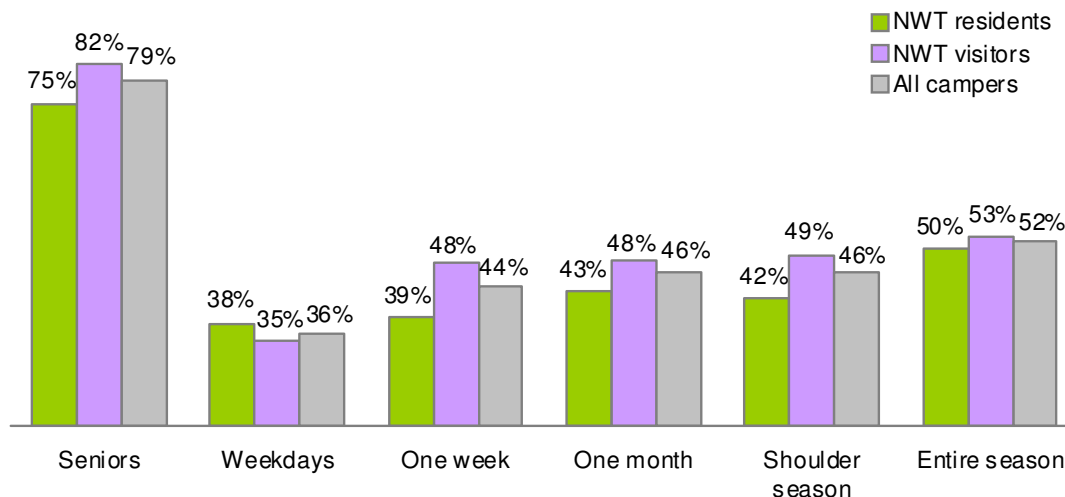
Note: Data from Q15. Base: 781.

- Extended stay supporters are *more* likely to say NWT Parks should offer a discount for entire season bookings.
- Of campers that support discounts for entire season stays, frequent campers are *more* likely to suggest 1% to 20% discounts.
- Of the campers that support discounts for entire season stays, those with the following characteristics are *more* likely to suggest discounts of greater than 21%:
 - NWT residents;
 - Extended stay supporters;
 - Casual campers; and
 - Campers who feel the main purpose of NWT campgrounds should be providing services to NWT visitors.

Support for discounts by residency

Figure 34 illustrates how support for the various discount categories differs between NWT residents and visitors. NWT visitors agree more with all discounts, with the exception of weekday camping.

Figure 34 SUPPORT FOR OFFERING DISCOUNTS: NWT RESIDENT VS. NWT VISITOR

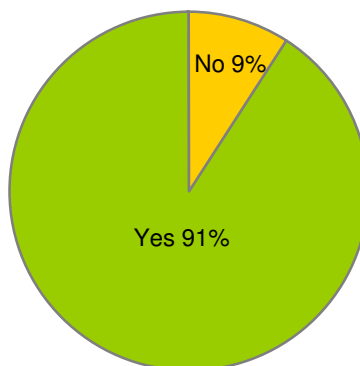


Note: Data from 15. Base: 781.

Current rates

Campers were asked if they feel the current fees are appropriate for the quality of services offered. If necessary, they were reminded of the 2007 prices for powered and non-powered campsites at public parks in the NWT. The vast majority (89%) feel the current fees are appropriate for the quality of services offered (see Figure 35).

Figure 35 CURRENT FEES ARE APPROPRIATE FOR THE QUALITY OF SERVICES OFFERED



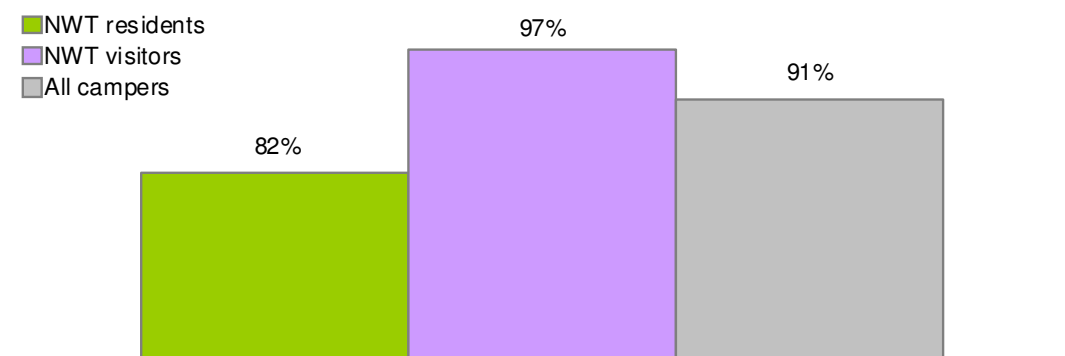
Note: Data from Q30. Base: 750.

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- Campers with the following characteristics are *more* likely to feel the current fees are *not* appropriate for the quality of services offered at NWT campsites:
 - NWT residents (see Figure 36); and
 - Campers who feel the main purpose of NWT campgrounds should be providing services to NWT residents.

Figure 36 CURRENT FEES APPROPRIATE: NWT RESIDENT VS. NWT VISITOR

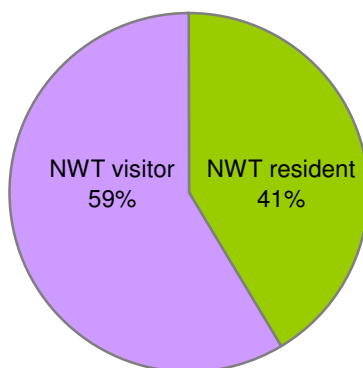


Note: Data from Q30. Base: 750.

Campground user profile

Residents and visitors

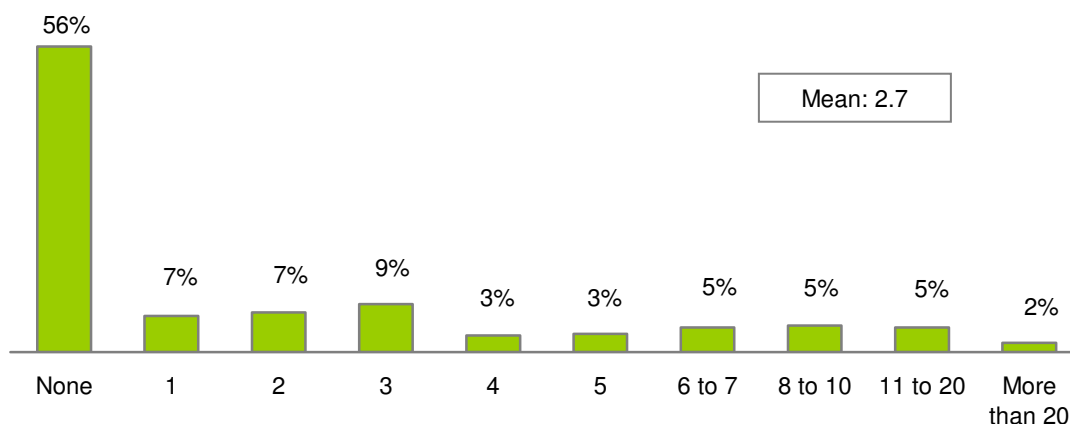
Figure 37 RESPONDENT REGION



Planned park usage

Campers were asked how many times they plan to camp overnight at an NWT campground in the 2008 season. More than one-half (56%) are not planning to camp at NWT campgrounds in 2008. Of those who do intend to camp in the NWT, the mean number of trips is 2.7.

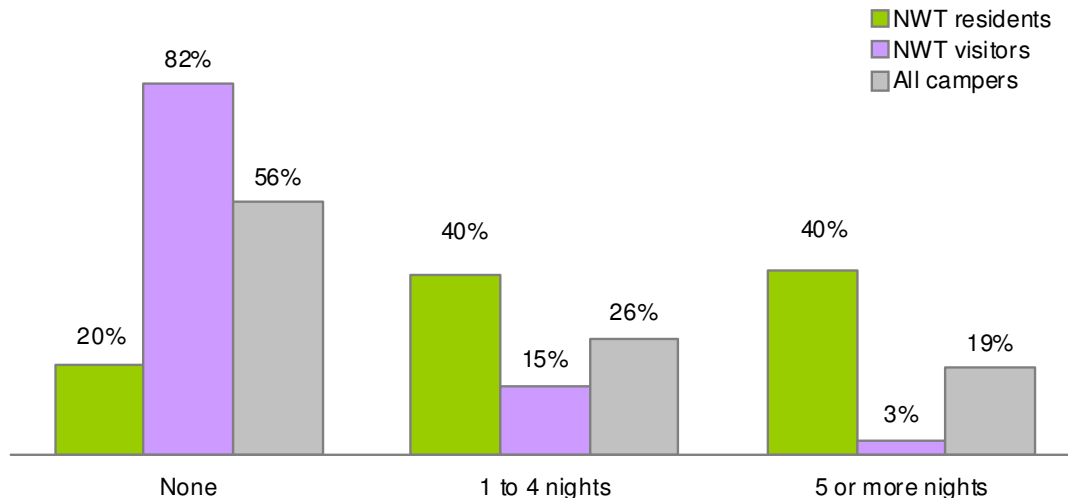
Figure 38 INTENDED CAMPING TRIPS IN NWT THIS SEASON



Note: Data from Q33. Base: 746.

- Campers with the following characteristics are *more* likely to have no planned overnight camping trips in NWT this season:
 - NWT visitors;
 - Casual campers; and
 - Campers who feel the main purpose of NWT campgrounds should be providing services equally to both NWT residents and visitors.
- Campers with the following characteristics are *more* likely to have planned 1 to 4 overnight camping trips in NWT this season:
 - NWT residents;
 - Casual campers; and
 - Campers who feel the main purpose of NWT campgrounds should be providing services to NWT visitors.
- NWT residents are *more* likely to have planned 5 or more overnight camping trips in NWT this season (see Figure 39 for comparison between residents and visitors).

Figure 39 PLANNED TRIPS THIS SEASON: NWT RESIDENT VS. NWT VISITOR



Note: Data derived from Q33.

Appendix: Marginal results

N = 785

DATE: __ __ / __ __

SURVEY # __ __ __ __

INTERVIEWER: __ __ __

PHONE: (__ __ __) - __ __ __ - __ __ __ __

REGION: NWT Resident53% Visitor.....47%

FORM: A53% B48%

May I please speak to _____?

ANSWERING MACHINE MESSAGE Hello, my name is _____ and I'm calling on behalf of Northwest Territories Tourism. We are calling to speak with NWT campground users. If you could please return my call, toll free, at 1-888-950-8002 and ask to speak to _____ I would greatly appreciate it. I look forward to talking to you soon. And again my toll free number is 1-888-950-8002.

Hello. May I please speak with _____? My name is _____ and I'm calling on behalf of Tourism and Parks in the Northwest Territories. We are calling to speak with campground users. Your input will provide the NWT with the information it needs to proceed with any changes to the campgrounds. Do you have a few minutes to conduct that interview now? **IF NO...** When would be a good time to call you back?
ARRANGE CALLBACK

I want to assure you that all of your answers will only be reported as a group and that your anonymity is guaranteed. I would like to inform you that this call may be monitored for quality assurance purposes.

Tourism and Parks currently operates an online reservation system, which allows park users to reserve specific campsites prior to arriving at the park.

Q1 Have you ever used the Online Reservation System to book a campsite at a NWT campground?

Yes48%

No.....51%

Don't know/refused<1%

ki squared



Q2 Why did you not use the Online Reservation System to book your campsite?
(N = 402)

Was not aware of ORS.....	14%
Reservation fee was too expensive	2%
Did not want to provide personal information online.....	1%
Do not have internet access.....	11%
Prefer alternative methods	18%
Other	53%
Don't know / refused	1%

Q3 Using a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the service provided by the Online Reservation System?
(N = 380)

Mean: 3.63

Very dissatisfied.....	10%
.....	10%
.....	17%
.....	32%
Very satisfied	31%
Don't know / refused	1%

Q4 Using a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the value for money provided by the Online Reservation System? (N = 380)

Mean: 3.11

Very dissatisfied.....	20%
.....	15%
.....	20%
.....	21%
Very satisfied	22%
Don't know / refused	2%

Q5 Using a scale of 1 to 5, where 1 means it has no value to me at all and 5 means it is of great value to me, how would you rate the value of a reservation system for parks in the Northwest Territories?

Mean: 3.28

No value to me at all	19%
.....	9%
.....	16%
.....	21%
Great value	25%
Don't know	10%

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Q6 Please rank the following methods of reserving a campsite, in order of preference, with 1 being the highest preference and 3 being the lowest preference. **READ LIST AND RECORD RANKING**

	1 st	2 nd	3 rd	DK	Mean
Booking online	37%	25%	36%	2%	1.99
Booking by telephone.....	20%	51%	27%	2%	2.08
Booking in person at the campground..	41%	22%	35%	2%	1.94

EXTENDED STAY CAMPSITES

Currently, both Reid Lake Territorial Park and Prelude Lake Territorial Park offer “Seasonal” campsites. These extended stay sites are offered to the public on a lottery draw basis whereby users can obtain a specific campsite for the full season at a reduced rate.

Q7 Should the Northwest Territories be offering extended stay campsites at public campgrounds in the NWT?

Yes	59%
No.....	26%
Don't know	15%

Q8 Which parks should allow extended stay camping for the full season?

Prelude Lake Territorial Park	22%	Nitainlaii Territorial Park	<1%
Reid Lake Territorial Park.....	21%	Queen Elizabeth Territorial Park	<1%
Fred Henne Territorial Park	7%	Sambaa Deh Territorial Park.....	<1%
Fort Providence Park	1%	Twin Falls Territorial Park.....	<1%
Hay River Territorial Park.....	1%	Day Use.....	1%
Lady Evelyn Falls Territorial Park...	1%	Larger parks / popular parks	<1%
60th Parallel Territorial Park	<1%	Inuvik	<1%
Blackstone Territorial Park	<1%	Other.....	<1%
Fort Simpson Park	<1%	All parks, but no specific names	
Gwich'in Territorial Park	<1%	mentioned	12%
Happy Valley Territorial Park	<1%	No extended stays should be allowed	.26%
Jak Territorial Park	<1%	Do not know	33%
Little Buffalo River Crossing	<1%		

Q9 In general, what proportion of campsites, if any, at parks, should be allocated exclusively for extended stay camping for the full season?

Mean: 20.50%

None.....	27%
1% to 10%.....	8%
11% to 20%.....	9%
21% to 30%.....	16%
31% to 40%.....	5%
41% to 50%.....	8%
51% to 100%.....	4%
Don't know	23%

Q10 Are there any parks that should not have any extended stay campsites?

Fred Henne Territorial Park	13%	Reid Lake Territorial Park	<1%
Lady Evelyn Falls Territorial Park...	1%	Twin Falls Territorial Park.....	<1%
Prelude Lake Territorial Park	1%	Twin Falls Gorge Park	<1%
Sambaa Deh Territorial Park	1%	Day Use.....	1%
60th Parallel Territorial Park	<1%	Other.....	1%
Blackstone Territorial Park	<1%	Larger parks / popular parks	<1%
Fort Providence Park	<1%	Smaller parks / remote	<1%
Fort Simpson Park	<1%	No park should be excluded.....	21%
Happy Valley Territorial Park	<1%	No extended stays at any park.....	26%
Queen Elizabeth Territorial Park....	<1%	Do not know	37%

Q11 Currently, there are approximately 30% of the campsites at Prelude Lake and Reid Lake Parks near Yellowknife that are available for booking extended stay campsites. Is this percentage...? (N = 666)

Too high	11%
About right	41%
Or, Too low	14%
No extended stays should be allowed	30%
Don't know / refused	4%

Q12 Currently, extended stays can be booked for the full season only. Should NWT Parks allow extended stays for less time than the full season, which is 16 weeks? (N = 666)

Yes	43%
No.....	23%
No extended stays should be allowed	30%
Don't know / refused	3%

Q13 And, how many weeks should be allowed for booking extended stays? (N = 287)

Mean: 5.57

1 to 2 weeks	19%
3 to 4 weeks	37%
5 to 10 weeks	29%
Longer than 10 weeks	8%
Don't know / refused	8%

Q14 How much should extended stay campsites cost, when compared to regular campsites? Should they cost... **READ LIST** (N = 465)

More	8%
Less	40%
or the same	20%
No extended stays should be allowed	30%
Don't know / refused	2%

Q15 Do you agree that discounts should be offered for: **READ LIST CIRCLE ALL THAT APPLY IF YES** What percentage of discount should be offered?

	Yes	Mean
Senior citizens	79%	22.75%
Weekdays	41%	20.44%
One week	48%	17.23%
One month	50%	21.07%
Shoulder season	50%	26.39%
The entire season	53%	23.80%

Senior citizens (N = 617)

1% to 10%	31%
11% to 20%	35%
21% to 30%	16%
31% to 100%	17%
Don't know / refused	1%

Weekdays (N = 320)

1% to 10%	38%
11% to 20%	33%
21% to 30%	15%
31% to 100%	13%
Don't know / refused	1%

One week (N = 380)

1% to 10%	44%
11% to 20%	36%
21% to 30%	13%
31% to 100%	7%
Don't know / refused	1%

One month (N = 392)

1% to 10%	27%
11% to 20%	41%
21% to 30%	22%
31% to 100%	11%
Don't know / refused	1%

Shoulder season (N = 391)

1% to 10%	22%
11% to 20%	29%
21% to 30%	25%
31% to 100%	22%
Don't know / refused	2%

The entire season (N = 412)

1% to 10%	22%
11% to 20%	37%
21% to 30%	23%
31% to 100%	17%
Don't know / refused	1%

CAMPSITE FEES

Q16 If you knew a *non-powered* campsite will cost \$30 per night, do you think you will definitely, probably, might or might not, probably not, or will you definitely not pay \$30 for a *non-powered* campsite in future?

Definitely pay for	5%
Probably pay for	10%
Might or might not pay for	7%
Probably not pay for	22%
Definitely not pay for	53%
Depends if it was a lower price	1%
Other	<1%
Don't know / refused	1%

Q17 What if it cost \$25 per night, do you think you will definitely, probably, might or might not, probably not, or will you definitely not pay \$25 for it? (N = 654)

Definitely pay for.....	3%
Probably pay for.....	14%
Might or might not pay for.....	16%
Probably not pay for.....	24%
Definitely not pay for.....	42%
Depends if it was a lower price.....	1%
Other	<1%
Don't know / refused	<1%

Q18 What if it cost \$20 per night? (N = 538)

Definitely pay for.....	21%
Probably pay for.....	33%
Might or might not pay for.....	19%
Probably not pay for.....	8%
Definitely not pay for.....	19%
Depends if it was a lower price.....	<1%
Other	<1%
Don't know / refused	0%

Q19 There are currently two different types of *non-powered* campsites. One is vehicle accessible, while the other has walk-in access only. Should the fees for these two site types be different?

Yes	80%
No.....	16%
Don't know / refused	4%

Q20 If you knew a *powered* campsite will cost \$30 per night, do you think you will definitely, probably, might or might not, probably not, or will you definitely not pay \$30 for a *powered* campsite in future?

Definitely pay for.....	23%
Probably pay for.....	25%
Might or might not pay for.....	10%
Probably not pay for.....	14%
Definitely not pay for.....	22%
Depends if it was a lower price.....	<1%
Other	1%
Will not use a powered campsite	3%
Don't know / refused	3%

Q21 What if it cost \$25 per night, do you think you will definitely, probably, might or might not, probably not, or will you definitely not pay \$25 for it? (N = 358)

Definitely pay for.....	7%
Probably pay for.....	28%
Might or might not pay for.....	20%
Probably not pay for.....	16%
Definitely not pay for.....	28%
Depends if it was a lower price.....	1%
Don't know / refused	1%

Q22 What if it cost \$20 per night? (N = 228)

Definitely pay for.....	25%
Probably pay for.....	32%
Might or might not pay for.....	13%
Probably not pay for.....	8%
Definitely not pay for.....	22%
Other	<1%

Q23 When thinking about campsite fees, are the current fees appropriate for the quality of services offered? **IF NECESSARY SAY...** Currently, camping fees are set as follows: powered sites are \$20 per night and non-powered sites are \$15 per night.

Yes	87%
No.....	11%
Don't know / refused	2%

GENERAL PARK USAGE

Q30 In 2007, how many times did you camp overnight at an NWT campground?

Mean: 5.55

None.....	3%
1.....	28%
2.....	13%
3.....	10%
4.....	9%
5.....	6%
6 to 7	8%
8 to 10	9%
11 to 20	9%
More than 20	4%
Don't know / refused	1%

Q31 Which Parks did you camp overnight at?

Fred Henne Territorial Park	36%	Little Buffalo River Crossing.....	1%
Prelude Lake Territorial Park	24%	Long Lake	1%
Reid Lake Territorial Park.....	18%	Queen Elizabeth Territorial Park	1%
Hay River Territorial Park.....	9%	Cameron	<1%
Twin Falls Territorial Park	7%	Caribou Park	<1%
Lady Evelyn Falls Territorial Park...	6%	Engineer Creek.....	<1%
Fort Providence Park	5%	Frame Lake.....	<1%
Fort Simpson Park	5%	Hidden Lake	<1%
Sambaa Deh Territorial Park	4%	Mosquito Lake	<1%
60th Parallel Territorial Park	3%	Nahanni	<1%
Blackstone Territorial Park	3%	Nitainlaii Territorial Park.....	<1%
Inuvik.....	3%	North Arm Trail	<1%
Jak Territorial Park.....	3%	Peel River	<1%
Louise Falls	3%	Pine Lake.....	<1%
Happy Valley Territorial Park	2%	Polar Lake	<1%
Kakisa River	2%	Wood Buffalo.....	<1%
Alexander Falls.....	1%	All, but no specific names mentioned<	1%
Enterprise.....	1%	Other.....	1%
Fort Laird.....	1%	None	2%
Fort Smith.....	1%	Do not know	16%
Gwich'in Territorial Park	1%		

Q32 How many times do you plan to camp overnight at an NWT campground this season?

Mean: 3.81

None.....	46%
1.....	7%
2.....	8%
3.....	7%
4.....	5%
5.....	4%
6 to 7	5%
8 to 10	7%
11 to 20	7%
More than 20	3%
Don't know / refused	4%

Q33 Which of the following should be the main purpose of NWT campgrounds...

Providing accommodations and services primarily to NWT residents	30%
Or, providing accommodations and services primarily to non-NWT residents	12%
Equal priority	56%
Don't know/refused	2%

Q34 Occasionally, we conduct group meetings or follow-up research for Northwest Territories Tourism to discuss various topics. Are you interested in participating in such meetings or research in future?

Yes	53%
No.....	46%
Don't know	1%

Q35 And what is your email address so that we may contact you?

Thank you for taking time to complete this survey and help in our effort to further understand and improve the tourism industry in the Northwest Territories.