Northwest Territories Industry, Tourism and Investment

2013 TRIP DIARY SURVEY
FINAL REPORT

malatest
Program Evaluation
& Market Research

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Northwest Territories Industry, Tourism and Investment

EXECUTIVE SUMMARY

Trip Diary Background

The Trip Diary program is implemented through the Tourism and Parks Division of ITI. Visitors to NWT can sign up to receive a Trip Diary, Dempster Highway Passport, or Deh Cho Travel Connection Passport at various locations across the territory. The Trip Diary acts as a souvenir for visitors, as it is stamped at different locations tourists visit, and allows ITI to collect contact information for NWT travellers for a post-travel survey.

The Trip Diary Phone Survey is conducted annually and collects information on trip characteristics and visitor demographic information after visitors return home. The survey provides insight into visitor vacation interests and activities to better target tourism services and to measure the impact and effectiveness of tourism strategies.

Methodology

In 2013, the Trip Diary Phone Survey was revised to target road travellers. The survey was also modified to reduce the length and obtain more information on visitor satisfaction. The 2013 survey was programmed for both telephone and online responses.

The survey sample was provided by ITI. The sample included 1,335 cases. Following cleaning to remove any duplicate cases or incomplete contact information, the sample contained 1,073 cases.

In total, 603 surveys were completed. The survey was administered between August 6 and November 30, 2013, with a valid response rate of 72%.

Throughout survey administration, the data collected was reviewed, cleaned, and coded as appropriate. Data was reviewed for outliers and illogical/inconsistent responses. The survey data was then weighted by the populations of visitors to NWT parks in 2013.

Three types of analysis were conducted: factor analysis, segmentation analyses, and driver analysis. Along with crosstabulations and descriptive statistics, these analysis described visitor activities, visitor preferences, visitor segments, and satisfaction.

Overall Survey Findings

Trip Characteristics

On average, visitors spent seven nights in NWT, with return visitors spending significantly more time than first time visitors (9.2 nights compared to 6.7 nights). Visitors typically travelled in groups of two (60%); often with their spouse and cited Yellowknife as their primary destination.

Trip Planning

Most visitors arrived by car or truck (65%); approximately one third of visitors drove a recreational vehicle (RV). Very few visitors cited RV shows as a source for planning their trip; only three RV shows were attended by visitors in 2013. Visitors typically use the internet to plan their trip and consider Yukon and Alaska as alternative destinations.

Arctic Air
Arctic Air was influential in the choice to travel to NWT for 18% of visitors that watched the show. Few visitors (1%) were aware that NWT Tourism is the main sponsor of Arctic Air.

Trip Activities and Satisfaction
Overall, visitors were highly satisfied with their trip and the majority (87%) plan to return to NWT. The three most popular activities were sightseeing (72%), museum visits (58%), and wildlife viewing (50%). More visitors participated in unguided activities in comparison to the same activity with a guide.

Deh Cho Travel Connection Loop
The percentage of visitors that travelled the Deh Cho loop (51%) was the lowest since 2006. Nearly one fifth of visitors were unsure if they had travelled the loop. Those that did not travel the loop commonly reported it was too far out of the way or that they did not know about the loop.

Aboriginal Tourism
Participation in Aboriginal tourism increased to the highest percentage of visitors since the Trip Diary Phone Survey was first implemented (64%). The most common Aboriginal tourism activities were visiting a cultural centre, museum, art gallery, or historical site. Visitors that did not participate in Aboriginal tourism commonly indicated they had insufficient time. In comparison to 2012, fewer visitors reported that they were unable to find Aboriginal tourism activities or that the activity was not available.

Travel Expenditures
In 2013, Visitors spent $662 per person, per trip, on average. Visitors spent more on bed and breakfasts, camping, tours, and boat and vehicle rentals in 2013 than previous years. Visitors spent less on prepaid packages, festivals and events, activities and entertainment, arts and crafts, groceries, alcohol, dining and airfare within NWT than previous years.

2013 Visitor Segments
Six visitor groups were identified in 2013. They are:

- Outdoor Adventurers: *Enjoy extreme adventure and adventure tours;*
- Comfort Seekers: *Search for the comforts of home and are not limited by cost;*
- Cultural Connoisseurs: *Participate in Aboriginal and cultural activities*;
- Roaming Retirees: *Seek quiet and safe Northern adventure at low-cost;*
- Social Sightseers: *Look for luxury while visiting family and friends*; and
- Wilderness Wanderers: *Desire a relaxing break from work in the wilderness, without a guide.*

Two groups remained relatively the same as 2012 (Roaming Retirees and Outdoor Adventurers) while the remaining groups differ to the extent that their name was changed.

Relationships between Visitor Preferences

Factor analysis produced five factors which described visitor preferences in meaningful ways. These five factors were:

- Mediated experiences;
- No-frills autonomy;
- Extreme challenges (new in 2013);
- Fair-weather adventuring; and
- Thrifty travel (new in 2013).

New and Emerging Segments

Business travellers were 2% of visitors in 2013. The majority added extra days to their business trip for leisure tourism. They tended to travel on their own and prefer activities without a guide.

The 2012 visitor segment "Home-grown Comfort Seekers" became "Comfort Seekers" because the majority of visitors in this segment came from outside of Canada. "Avid Learners" became "Cultural Connoisseurs" in 2013. They differed in trip planning habits, interest in physical challenges, and country of origin. "Sociable Thrift-seekers" changed to "Social Sightseers" in 2013. These two groups differed in primary reasons for travel and interest in physical challenges and extreme adventure. "Conservative Independents" transitioned to "Wilderness Wanderers" in 2013. These visitors differed in trip motivators, trip planning habits and likelihood of return.

Trends, Conclusions and Recommendations

Changes in tourism illustrated that visitors were spending less time planning their trip. Use of online resources for trip planning increased.

Many visitors did not travel the Deh Cho Travel Connection Loop or were unaware of the loop. Promotion and advertising may be required to increase the number of visitors travelling the loop and visitor recall of the activity.

Participation in Aboriginal tourism increased significantly with the introduction of the Tourism 2015 Plan. Aboriginal tourism activities were more accessible and available in 2013.

High overall trip satisfaction (average rating 4.88 out of five) and limited variance with satisfaction with various aspects of their trip indicates that visitors are receiving the experience they plan for when travelling to NWT.

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SECTION 1: INTRODUCTION

The mandate of the GNWT department of Industry, Tourism, and Investment (ITI) is to provide quality programs and services that promote and encourage NWT economic prosperity and community self-reliance. ITI is also responsible for developing, maintaining, and operating facilities such as visitor centres and interpretive displays. ITI works closely with Northwest Territories Tourism and provides support to the NWT Tourism industry in the areas of marketing, research, training, and product development.

In 2011, ITI introduced a new plan for tourism in the NWT. Tourism 2015: New Directions for a Spectacular Future outlined the following goals:

- Increase tourism revenues to $130 million by 2015/2016;
- Increase community support for tourism;
- Grow Aboriginal tourism sector;
- Increase tourism industry revenues and profitability;
- Expand the number of businesses and tourism products offered in NWT;
- Improve the business skill of tourism business owners and managers;
- Leverage parks and campgrounds as tourism products to attract new visitors to the NWT;
- Enhance the hospitality of the tourism workforce; and
- Integrate the Arts and Crafts sector more fully into the tourism industry. [1]

The Trip Diary program is implemented through the Tourism and Parks Division of ITI. Visitors to NWT can sign up to receive a Trip Diary, Dempster Highway Passport, or Deh Cho Travel Connection Passport at various locations across the territory. The Trip Diary is a souvenir that visitors can get stamped at different locations they visit.

Information from the Trip Diary survey is used to understand trends in visitation and visitor satisfaction with services provided in NWT. Survey findings also provide important information to individual tourism operators in NWT and those interested in developing a tourism business. Visitor profiles assist tourism operators plan business expansion and modification to services so as to meet the needs and expectations of visitors. Survey findings also allow individual operators to plan effective, timely, and targeted marketing campaigns.

Survey findings also support ITI in understanding progress made towards objectives outlined in the Tourism 2015 Plan; particularly in the areas of community support, Aboriginal tourism, and hospitality of the tourism workforce. Findings of the *2013 Trip Diary Phone Survey* will provide guidance to ITI for future investment.

When visitors sign up to receive the Trip Diary their personal contact information and travel dates with anticipated date of return home is collected. Visitors are then contacted to collect information about trip characteristics, spending patterns, travel attitudes, motivations, and demographics.

Visitors that provide contact information for the Trip Diary program are contacted soon after their visit to the NWT. For the first five years of the program, information was collected in the form of an

[1] 2011. Northwest Territories Industry, Tourism and Investment. Tourism 2015: New Directions for a Spectacular Future.

18 minute telephone survey. In 2013, the survey was shortened, made available to visitors online and revised to include questions about participation in Aboriginal tourism activities so as to inform progress towards ITI's Aboriginal Tourism Engagement strategy developed in 2010. Additionally in 2013 analysis of visitor satisfaction was expanded.

From the Trip Diary survey results are developed profiles of NWT's visitors. The profiles outline the types of activities visitors participate in, their spending patterns and the reasons for choosing NWT as a destination. Prior to 2013, analysis identified the following visitor segments: Conservative Independents, Outdoor Adventurers, Social Thrift-Seekers, Roaming Retirees, Home-Grown Comfort-Seekers, and Avid Learners.

In 2013, data was analyzed to determine whether these groups are still prominent and whether there are any new and emerging visitor groups.

SECTION 2: METHODOLOGY

2.1 Survey Design

The survey instrument that was used from 2006 to 2012 was reviewed and modified. The survey was shortened and questions were added to target road travellers. A screening question was added to disqualify air travellers from completing the survey.

Questions removed from the survey included those:

- directed at air travellers;
- referring to Canada's Northern house at the 2010 Olympics;
- asking for comments on the trip diary itself; and
- requesting visitors' ages.

Several open-ended questions were converted to closed ended questions. Response options for those questions were developed through coding responses in previous survey administrations.

Questions were added to the survey to inform a driver analysis. In order to conduct this analysis, more questions on overall trip satisfaction and satisfaction with the activities that were key to the decision to travel to NWT were added. Questions on participation in Aboriginal tourism activities were also added, along with questions inquiring about recent marketing campaigns, websites, and events used to promote travel to NWT.

As a result of the changes to the survey, the survey length was reduced from 18 to 16 minutes. The modified Trip Diary Survey is provided in **Appendix A**.

2.2 Survey Programming and Testing

The approved survey was programmed into CallWeb, Malatest's CATI/CAWI system, for both online and telephone administration. CallWeb was programmed to:

- Track respondents within the database by call disposition and set calling queues based on number of times called and other call disposition variables;
- Flag outlier data and/or illogical responses during the interview process. Specifically, for questions on expenses, CallWeb prompted the interviewer to ask about expenses that were outside of the ranges provided by ITI. This prompt appeared on screen for those who completed the survey online only if their responses were outside of the range; and
- Set timing fields by question to more closely monitor the length of the survey or individual survey components/modules (seconds or minutes).

A quality assurance audit was completed to ensure that on the programmed survey, survey questions appeared in the proper sequence. Testing also verified that out of range values could not be entered.

Full survey administration was preceded by a training session with survey staff and a field test. The field test was completed on July 30, 2013. A total of 14 survey completions were obtained via telephone during the field test. No changes were made to the survey based on the results of the field test.

2.3 Survey Sample

The survey sample was provided by ITI. The sample consisted of visitors that received a Trip Diary or Passport in NWT. Prior to and during survey administration, between July and September 2013, sample was delivered weekly from ITI for visitors who received Trip Diaries from the visitor centres. Sample from the other locations (Deh Cho Travel Connection Loop and the Dempster Highway) were received in October and November for the entire season.

The sample was cleaned by removing incomplete and duplicate records. Overall, Malatest received 1,335 cases from ITI. After removing duplicate cases, those with missing contact information, air travellers, and residents of NWT, the final eligible sample included 1,013 cases.

The following steps were taken to contact incomplete records or those with incorrect information:

- Cases that included wrong numbers or that were not in service underwent a directory assistance search to try to get the proper contact information;
- Cases where a 'return home date' was not provided were called in October and November; and
- Cases that provided an email but no phone number were invited to participate via email.

2.4 Survey Administration

Full survey administration began on August 6, 2013, and was completed on November 30, 2013. While the survey was available to be administered in over 20 languages, only English, French and German were requested by visitors. The valid response rate for this survey was 70.9%.

The 2013 administration was the first in which the Trip Diary survey was available online. This option opened the survey to 50 additional visitors who did not provide phone numbers.

For the 2013 Trip Diary Phone Survey, 603 surveys were completed, 16 of which were completed online. Table 2-1 (next page) outlines the final call outcomes for all sample.

Table 2-1 : 2013 Trip Diary Phone Survey Call Outcomes	Overall
Completions	
Completed telephone (587) and online (16)	603
Non-Qualifiers	
Respondent is from NWT	14
Respondent arrived by air	46
Invalid Sample	
Wrong number/not in service	126
Duplicate record	37
Refusals/Not Traceable	
Visitor refusal to participate	32
Called maximum number of times (average 9.9 times)	186
Respondent stated they prefer to complete survey online, however did not complete the survey.	2
Began online but did not finish	3
Email invitations were sent- no response received	24
TOTAL	**1,073**

Call outcomes for each intercept point are presented in **Appendix D**.

2.5 Data Cleaning and Weighting

Throughout survey administration, the data collected was reviewed, cleaned, and coded as appropriate. Data was reviewed for outliers and illogical/inconsistent responses not caught by CallWeb or the surveyor during administration.

Data weighting was conducted in order to align the sample with the actual population of travelers within NWT. Weighting was conducted along two strata of interest: a) country of origin and b) intercept point, i.e. the location at which trip diary participants picked up their trip diaries. Country of origin was simplified into three categories: Canadian, American, and Other International travelers. Population data was provided by ITI, based on the reported nationalities of visitors to NWT parks during 2013. Population data for intercept points was based on the complete population of travelers who picked up trip diaries during 2013.

2.6 Data Analysis

Analysis of the cleaned survey data included a variety of statistical methods, tests, and models. All statistical analysis was conducted using SPSS 19.

All variables were first inspected using descriptive statistics, including frequencies for categorical variables and means and standard deviations for continuous variables. Descriptive findings for all survey questions are presented in **Appendix A** of this report.

Comparative analyses, including crosstabulations and comparisons of means, were used to identify differences in attitudes, values, activities, and other areas of interest between different respondent groups. Where appropriate, tests of significance, including Chi-squared tests for crosstabs and ANOVA tables with eta-squared scores for means comparisons, were conducted to ensure the validity of the comparisons. Only statistically significant comparative analyses have been reported.

2.6.1 Segmentation Analysis

Segmentation analysis was conducted by means of the SPSS K-means clustering procedure. The segmentation analysis was designed to group similar respondents together based on specific criteria. The variables used for the segmentation analysis were C24a-h and C25a-o. These questions require respondents to rate the importance of various trip characteristics. Segmentation analysis was first conducted using 2013 data only, in order to determine whether similar segments to the analyses run in previous years would be evident, or whether 2013 visitors demonstrated emerging patterns or characteristics that differed from previous years' aggregated data.

K-means clustering was run using several different cluster models. Ultimately, as in previous years, six clusters were found to be most representative of the respondent groups. Each of the six segments was examined closely to determine its defining attributes, and crosstabulations and comparisons of means were used to profile each segment. Further segmentation analysis was conducted using aggregated 2006-2013 data to report trends in segment membership and attributes over time.

The findings of the segmentation analysis, along with detailed profiles for each segment, are presented in **Section 3.2** of this report.

2.6.2 Factor Analysis

A factor analysis was conducted, based on the importance of 22 attributes to respondents' decisions regarding vacation destinations. These attributes were measured in variables C24a-h and C25a-o. These questions ask visitors to rate the importance of various trip characteristics. Five factors were identified which collectively explain meaningful aspects of travelers' preferences. Each of the five factors is described and discussed in **Section 3.3** of this report, and the influences of the various factors are identified throughout the findings wherever they are relevant.

In keeping with previous years' methods, the factor analysis employed principal axis factoring with an oblique rotation method. The strength of the factor analysis was assessed using the Kaiser-Meyer-Olkin Measure of Sampling Adequacy, and the significance of the factor analysis was tested using Bartlett's Test of Sphericity with a significance threshold of .05.

The selection of five factors was based on eigenvalues of greater than 1.2, inspection of the scree plot, and examination of the factor matrix. Seven factors were found to have eigenvalues greater than 1.0, but the two factors with the lowest eigenvalues had low explanatory power and offered little conceptual clarity. The scree plot and full listing of eigenvalues and explained variance are provided in **Appendix B**. The five factors identified are: mediated experiences, no-frills autonomy, extreme challenges, fair weather adventuring, and thrifty travel. These are further described in **Section 3.3**.

2.6.3 Driver Analysis

In order to conduct driver analysis, which employ multiple regression analyses to identify key drivers which affect or predict variables of interest, the dependent variables being predicted must have sufficient variance. High ratings of overall satisfaction among respondents resulted in a standard deviation of only 0.37 for this dependent variable, limiting the ability of multiple regression to predict variance. This limitation, which precluded the use of driver analysis for this report, is further described in **Appendix C**.

2.7 Reporting

This report presents all relevant and significant findings revealed by the analyses described above. Where possible, visitor characteristics have been compared to those from previous Trip Diary reports.

SECTION 3: 2013 TRIP DIARY SURVEY FINDINGS

3.1 Overall Survey Findings

The Trip Diary Telephone Survey was completed by visitors from Canada, the United States of America (USA), and other international locations. Among 2013 respondents, after data weighting, 75% were from Canada, 11% were from USA, and 14% were from other countries. The majority of respondents (71%) were first time visitors to NWT, while nearly one third (29%) were return travelers.[2] The proportion of first time visitors has increased slightly since 2012, but is consistent with data from 2009-2011.[3]

3.1.1 Trip Characteristics

The majority of visitors (67%) reported that they spent a week or less in NWT. Visitors reported spending an average of 7.16 nights in NWT.[4] Returning visitors on average spent significantly more time in NWT, spending 9.2 nights compared to 6.7 nights.

Table 3-1: Number of Nights Spent in NWT

Number of Nights	Percent of Visitors
One to Seven Nights	67%
Eight to 14 Nights	25%
15 to 21 Nights	5%
Longer than 21 Nights	3%

Source: Trip Diary Survey, QA1 n = 603

Overall, more respondents indicated that Yellowknife was the primary destination for their trip to NWT than any other destination (see Table 3-2, next page). Respondents who stated that Yellowknife was their primary destination indicated that, wilderness, isolation, landscape; wildlife, natural phenomenon; and culture or history were their top reasons for choosing to visit NWT.

[2] Source: Trip Diary Survey QA2 n=603.
[3] Source: Trip Diary Survey Report 2012, Kisquared; Trip Diary Survey QA2 n=603.
[4] Source Trip Diary Survey QA1 n=593.

Table 3-2: Top Ten Destinations of Visitors

Destination	Percent of Visitors
Yellowknife	40%
Inuvik	29%
Hay River	7%
Tuktoyaktuk	6%
Dempster Highway	4%
Fort Smith	2%
Fort Simpson	2%
Primary destination outside NWT	2%
Fort Providence	2%
Wood Buffalo National Park	1%

Source: Trip Diary Survey, QA3, QA9 n = 602
Note: Percentages do not add to 100% because only the top ten destinations were reported

3.1.2 Trip Planning

Most visitors travelled in groups of six or less, with the majority (60%) travelling in groups of two.[5] Some visitors (4%) travelled in groups larger than ten people. Visitors tended to travel with their spouses (78%) and families (28%). The remaining visitors travelled individually (5%).[6]

Visitors were asked to identify their top three reasons for visiting NWT. The most common reason identified was having always wanted to visit NWT (60%). Some visitors also reported choosing NWT for general interest (47%), general touring (36%), visiting friends or relatives (12%), or for business purposes (2%).[7] This has changed from 2012, when the top reason for travelling was for wilderness, isolation, landscape, or wildlife.[8]

Almost one third of visitors (29%) travelled to NWT in a recreational vehicle (RV). [9] Of the RV travellers, 24% visited one of three RV shows to assist in trip planning: the Abbotsford Early Bird RV Show, the Quartzside RV Show 2013, and the Vancouver Outdoor Adventure Show 2013.[10] Table 3-3 (next page) displays the modes of transportation reported by visitors.

[5] Source: Trip Diary Survey QA6a n=603.
[6] Source: Trip Diary Survey QA6b n=689 Note: Percentages are greater than 100 because respondents were able to select multiple responses. This was not a multiple response question 2006-2012.
[7] Source: Trip Diary Phone Survey QA7 n=630.
[8] Source: 2012. Kisquared. Trip Diary Phone Survey Final Report.
[9] Source: Trip Diary Phone Survey QS3 n=603
[10] Source: Trip Diary Phone Survey QC22b n=3 and QS3 n=603

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Table 3-3: Mode of Transportation

	Percent of Visitors
Car/Truck	65%
RV	29%
Motorcycle	1%
Bicycle	1%
Bus/Tour Bus	4%
Total	100%

Source: Trip Diary Survey, QS3 n = 603
Note: Those that arrived by air are not included (46).

When planning their trip, most visitors also considered visiting Yukon or Alaska. Given the similarities in available activities (Aboriginal tourism and northern lights viewing) and the close proximity to NWT, these findings are not surprising. The following table indicates the five most common other destinations considered (see Table 3-4).

Table 3-4: Other Destinations Considered in Trip Planning

	Percent of Visitors
Yukon	36%
Alaska	25%
British Columbia	21%
Alberta	15%
Other Canadian Provinces	2%

Source: Trip Diary Survey, QA4 n = 603

Visitors to NWT reported planning their trip five months in advance on average.[11] This average was lower than previous years, indicating that 2013 visitors planned their trips closer to the time that they traveled than visitors in previous years did.[12]

Visitors also used various sources to plan their trip. The most common source was the internet: 70% of visitors used the internet to help plan their trip (see Table 3-5). Similar to last year, the most common website used was www.SpectacularNWT.com. In comparison to 2012, the number of visitors that used the Deh Cho website decreased and the number that used Trip Advisor and Expedia increased. As illustrated in Table 3-5 (next page), more visitors relied on Brochures, posters, or maps; travel guidebooks, the Milepost, and tourism operators than last year when planning their trip.

[11] Source: Trip Diary Survey QC21 n=541
[12] Source: Trip Diary Survey QC21 n=541 and 2009-2012 Trip Diary Survey Q19

Table 3-5: Top Ten Sources used for Trip Planning

Source	Per Cent of Visitors 2012	Per Cent of Visitors 2013
Internet (general)	47%	70%
Brochures, posters or maps	40%	43%
Travel guidebooks	25%	30%
The Milepost	21%	29%
Tourism business/operator	8%	17%
Word of mouth	37%	17%
NWT Explorers Guide	22%	16%
Been there before	20%	14%
Other	3%	14%
Travel Agent	3%	8%

Source: Trip Diary Survey, QC22 n = 603
Note: The total percentage is greater than 100 because respondents were able to select multiple sources.' Internet' includes all websites reported visited by Visitors.

3.1.3 Arctic Air's Impact on Trip Planning

NWT Tourism is the main sponsor of the Arctic Air television program on CBC.[13] In 2013, 39% of visitors indicated they have watched Arctic Air.[14] The extent to which visitors had watched Arctic Air is further described in Table 3-6.

Table 3-6: Extent Visitors Watch Arctic Air

	Per Cent of Visitors
Watched an entire season	6%
Watched several episodes	27%
Watched one episode	6%
Never watch Arctic Air	52%
Don't know	8%
No response	1%

Source: Trip Diary Survey, QC23a n=603

Approximately 18% of those who had watched Arctic Air stated that the show was influential in their decision to travel to NWT.[15] The majority of visitors (92%) did not know which organization sponsored the show. Only 1% of visitors were aware that NWT Tourism was the main sponsor. A few visitors (4%) thought that the Canadian Broadcasting Corporation was the main sponsor. The remaining 3% of visitors suggested airlines, corporate sponsors, or NWT in general were the main sponsor of the series.[16]

13. Government of Northwest Territories Industry, ITI, 2013. Arctic Air http://www.iti.gov.nt.ca/content/arctic-air-profile
14 Source: Trip Diary Phone Survey QC23a n=603
15 Source: Trip Diary Phone Survey QC23c n=603
16 Source: Trip Diary Phone Survey QC23b n=566

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3.1.4 Trip Activities and Satisfaction

Overall, visitors were highly satisfied with their trip to NWT. When asked to rate their satisfaction on a scale of one to five where five is very satisfied, the average response was 4.88.[17] The majority of visitors (87%) also stated that they planned to visit NWT again.[18] Visitors who did not intend to return to NWT were significantly more likely to be retired.[19] Individuals whose main reason for travelling was visiting family and friends were more likely to plan to return to NWT than those who did not.[20]

Due to high levels of satisfaction amongst all visitors, statistical analyses were unable to determine the key drivers of trip satisfaction. These findings suggest that tourism operators and the Government of NWT are doing exceptionally well in ensuring that visitors have positive experiences.

In 2013, NWT became the "Aurora Capital of the World", according to NWT Tourism.[21] This claim may have inspired those who wished to see the northern lights to visit NWT. As illustrated in Table 3-7, all visitors who travelled to NWT specifically to see natural phenomena, events, and attractions were highly satisfied with that activity (i.e., they rated this activity a 4 or 5 out of 5). Visitors who indicated that they participated in viewing the Northern lights, including those who did not list it as a primary reason for their trip, rated the activity an average of 3.81 out of 5.[22] While this is a positive rating, it was the activity with the lowest mean rating of satisfaction. Lower ratings of satisfaction are likely because the northern lights are difficult to see in the summer due to extended daylight hours.

As illustrated in Table 3-7, visitors who travelled for culture or history reasons had the lowest satisfaction; however, almost 90% of visitors were satisfied with that activity. In 2013, no visitors indicated that hunting or unguided fishing were primary reasons for travelling to NWT.

Table 3-7: Satisfaction with Activities that Attract Visitors to NWT

Activity	Percent of Visitors Satisfied with Activity
Guided Outdoor Adventure (Eco-Tourism)	100%
Natural Phenomenon, Events and Attractions	100%
Wilderness, Isolation, landscape, or wildlife	96%
Unguided Adventure (Eco-Tourism)	93%
Guided Fishing	90%
Culture or History	89%

Source: Trip Diary Survey, QA7, QA8 n = 603 Note: Percentage of visitors satisfied with activity represents respondents who reported "satisfied" or "very satisfied".

[17] Source: Trip Diary Survey QA9 n=602.
[18] Source Trip Diary Survey QA10 n=603.
[19] Source: Trip Diary Survey QA10 n=603 and QD3 n=480.
[20] Source: Trip Diary Survey QA10 n=603 and QA7 n=603.
[21] Source: 2013 Northwest Territories Tourism. Northwest Territories Stakes Claim to Being the Aurora Capital of the World.
[22] Source: Trip Diary Survey QC28d n=34.

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Sightseeing was the most commonly reported activity (see Table 3-8). Other popular activities included museum visits and wildlife viewing. The least common activity in 2013 was hunting. Table 3-8 presents participation frequencies and average satisfaction levels.

Table 3-8: Visitor Satisfaction with Trip Activities

Activity	% of Visitors participated	Average Satisfaction
Sightseeing	72%	4.77
Museum visit	58%	4.75
Wildlife viewing	50%	4.71
Art Gallery visit	42%	4.59
Hiking	39%	4.72
Camping	37%	4.63
Photography	36%	4.68
Unguided Walking Tour	35%	4.46
Shopping	35%	4.29
Historical Site visits	33%	4.46
Unguided Vehicle Town Tour	27%	4.50
Restaurant with Northern Cuisine	25%	4.35
Guided Walking Tour	25%	4.63
Buffalo viewing	23%	4.57
Unguided Fishing	18%	4.59
Boating, Cruising, or Sailing	16%	4.55
Airplane or Helicopter Tour	16%	4.79
Bird Watching	15%	4.19
Art, Music, or Film Festival	15%	4.70
Canoeing, Kayaking, or Rafting	8%	4.59
Viewing Northern Lights	6%	3.81
Guided Vehicle Town Tour	5%	4.62
Biking	5%	4.55
Golfing	4%	4.55
Guided Fishing	3%	4.95
Festival or Sporting Event	2%	*
Other	2%	*
Unguided Hunting	>1%	5.00
Guided Hunting	0%	0.00

Source: Trip Diary Survey, QC28a-h and C29a-m n=603

*Respondents did not rate satisfaction for these activities

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Among the activities in which visitors participated, unguided activities tended to be more popular than guided activities (see Table 3-9).

Table 3-9: Participation in Guided and Unguided Activities

	Guided	Unguided
Fishing	3%	18%
Walking Tours	25%	35%
Vehicle Town Tours	5%	27%
Hunting		

Source: Trip Diary Survey, QC28a-h and C29a-m; n=603

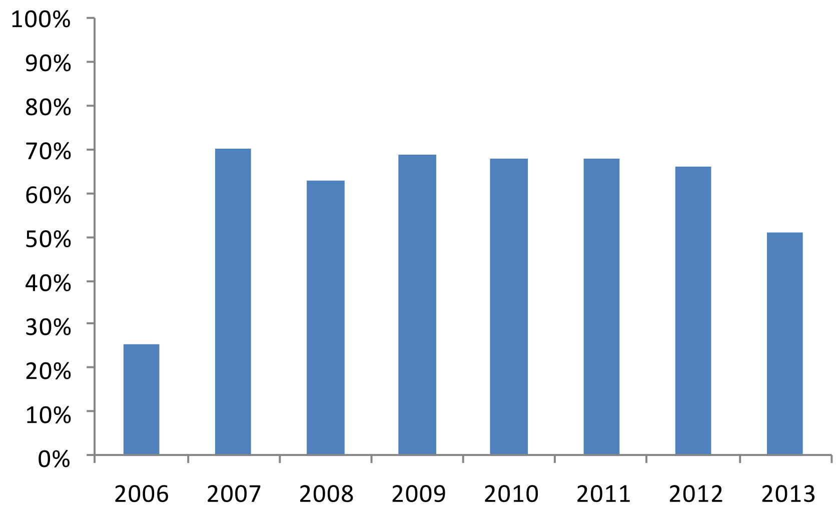
3.1.5 Deh Cho Travel Connection Loop – 2013

Deh Cho, meaning "Big River", is the Dene name for the Mackenzie River.[23] The Deh Cho Travel Connection Loop connects Alberta, British Columbia, and NWT. Visitors that receive a Deh Cho Travel Connection Passport and receive four stamps at other locations were able to enter the "Diamonds in the Rough Passport Contest" to win a polar bear diamond and other prizes. Approximately half (51%) of visitors reported that they travelled the Deh Cho loop in 2013. Canadians from Alberta or British Columbia driving to NWT should almost always drive on a portion of the loop. Given that the majority of road travelers originated from within Canada in 2013 (80%), this suggests that many travelers were unaware of the loop. In 2013, approximately 19% of visitors were unsure if they had travelled on the loop or not.

In 2013, the percentage of visitors reporting they travelled the Deh Cho loop was the lowest percentage since 2006 (see Figure 3-1, next page).

[23] 2013. Deh Cho Travel Connection. http://dehchotravel.ca/learn_more/history.php

Figure 3-1: Percent of Visitors that Travelled the Deh Cho Loop 2006-2013



Source: Trip Diary survey 2006-2012 Q94, 2013 QC26a n=566

The three most common reasons for not travelling the Deh Cho loop were that:

- It was too far out of the way (44%);
- They didn't know about the loop (22%); and
- There was not enough time (21%).

Given the number of visitors reporting they were unaware of the Deh Cho loop, and those who were not sure if they had travelled on the loop, more promotion may be required to increase awareness of the Deh Cho Loop.

No statistically significant or noteworthy differences in demographic information and trip characteristics were found between those who did and did not travel the Deh Cho loop in 2013. Minor differences were found in the type of accommodations used by those who travelled the loop, however: visitors travelling the Deh Cho loop were less likely to stay with friends or relatives (7.7% compared to 14.7%), at roadside pullouts (4.6% compared to 6.5%), or in wilderness camping (2.5% compared to 6.6%) and were more likely to stay at Bed and Breakfasts (7.3% compared to 6.8%) than those who did not travel the loop.[24]

3.1.6 Aboriginal Tourism Activities

Over the past few years, ITI has been working to advance and develop Aboriginal tourism in NWT. This includes addressing the growing demands for tourism products based in authentic Aboriginal culture.[25] Between 2009 and 2011, approximately 30% of visitors participated in Aboriginal tourism activities each year. Participation in Aboriginal tourism increased to 42% in 2012 and to 64% in 2013 (see Figure 3-2, next page). This significant increase in participation in Aboriginal tourism coincides with the introduction of the Tourism 2015 Plan.

[24] Source: Trip Diary Survey QC26a n=603 and QA5 n=603

[25] 2013. Government of Northwest Territories Industry, Tourism and Investment. Aboriginal Tourism. http://www.iti.gov.nt.ca/content/aboriginal-tourism

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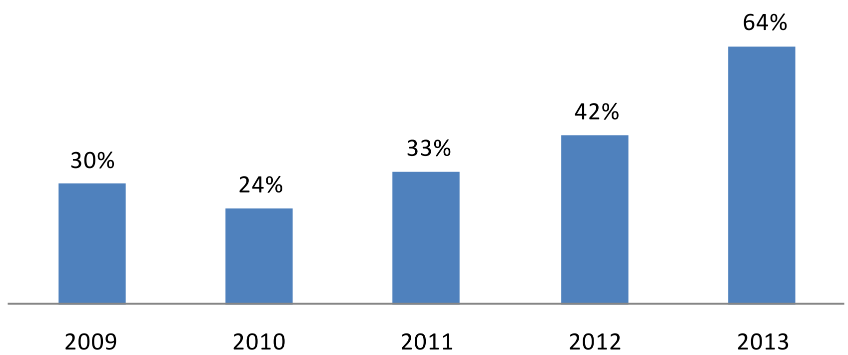
Figure 3-2: Participation in Aboriginal Tourism 2009-2013



Source: Trip Diary Survey QC31 n=566 and 2012. Kisquared. Trip Diary Phone Survey Final Report
Note: The Aboriginal Tourism question was added to the survey in 2009

Visitors were asked to indicate the Aboriginal tourism activities in which they participated (see Table 3-10). The most popular Aboriginal tourism activity was visiting a cultural centre, museum, art gallery, or historical site (69% of those that participated in Aboriginal tourism). Touring Aboriginal communities was also a popular activity, with 24% participating in a guided tour and 22% touring a community independently.[26]

Table 3-10: Aboriginal Tourism Activities

	Percent of Visitors
Participated in Aboriginal Tourism	**64%**
- Visited cultural center, museum, art gallery or historical site	69%
- Took a guided tour of an Aboriginal community	24%
- Took an unguided tour of an Aboriginal community	22%
- Aboriginal cultural events, festivals or performances	20%
- Experienced traditional Aboriginal cuisine	19%
- Participated in cultural workshops (i.e. tufting, basket making, carving)	5%
- Other	1%
Did not participate in activities	**36%**

Source: Trip Diary Survey, QC31a n=604
Note: The total percentage is greater than 100 because respondents were able to select multiple responses.

[26] Percentages are of those that participated in Aboriginal tourism.

Crosstabulations determined differences in visitors who did and did not participate in Aboriginal tourism. These differences are outlined in Table 3-11.

Table 3-11: Likelihood of Participating in Aboriginal Tourism

	More Likely to Participate	Less Likely to Participate
Primary Destination	Yellowknife Inuvik	Hay River Fort Simpson
Country of Origin	Canada	United States, Other International
Education	Completed High school or higher	Did not complete high school
Reason for Travel	General Interest, always wanted to visit	Unguided fishing, guided fishing, unguided adventure
Intercept Point	Deh Cho, Dempster Highway	Fort Simpson Northern Frontier

Source: Trip Diary Survey QA7, QA3, QD2 n=603

The most common reason cited for not participating in Aboriginal tourism was insufficient time.[27] Table 3-12 describes the reasons visitors gave for not participating in Aboriginal tourism. Compared to previous years, there was an increase in visitors not participating due to lack of interest and a decrease in visitors that were unable to find the activity or unavailable activities. This, along with the significant increase in participation in Aboriginal activities, suggests that the availability of Aboriginal tourism activities has increased and that Aboriginal tourism activities were easier for visitors to find in 2013 than in previous years.

Table 3-12: Reasons for Not Participating in Aboriginal Tourism Activities 2010-2013

	2010	2011	2012	2013
I did not have enough time	38%	35%	33%	32%
I was not aware of what was available	35%	26%	32%	29%
The activity/event was not available	33%	32%	21%	16%
I was not interested	8%	10%	10%	15%
I could not find what I was looking for	2%	5%	9%	4%
The activity/event was difficult to access	2%	3%	1%	3%

Source: Trip Diary Survey, QC31b n=194

Note: Only percentages greater than one (1%) are reported in the above table. In 2013, visitors only selected one response. Visitors selected multiple responses in 2010 to 2012.

[27] Source: Trip Diary Survey QC31a n=603

3.1.7 Travel Expenditures

On average, visitors spent $662 per person per trip in 2013. This is a decrease of $56 compared to the 2012 average. Comparisons of 2013 spending with average spending from 2009 to 2012 illustrates that visitors spent more than the historical average on:

- Bed and Breakfasts;
- Camping;
- Tours;
- Boat and vehicle rentals; and
- Other expenditures.

By contrast, visitors in 2013 spent less than the historical average on:

- Pre-paid packages;
- Festivals and events;
- Activities and entertainment;
- Arts and crafts;
- Groceries;
- Alcohol;
- Dining; and
- Airfare within NWT.

Average expenditures per person per trip between 2009 and 2013 are outlined in Table 3-13.

Table 3-13: Travel Expenditures Per Person, Per Trip

Mean Expenditures (per person, per trip)	**2009**	**2010**	**2011**	**2012**	**2013**
Pre-paid packages	$149	$138	$379	$109	$115
Hotels and motels	$51	$81	$44	$74	$65
Apartment or house rental	$0	$4	$1	$2	$3
Bed and Breakfasts	$8	$7	$17	$10	$13
Camping	$31	$27	$24	$43	$36
Festivals and events	$0	$4	$5	$6	$2
Activities and entertainment	$22	$10	$7	$10	$4
Arts and Crafts	$53	$56	$50	$51	$38
Souvenirs	$25	$36	$28	$32	$32
Tours	$28	$26	$30	$49	$72
Taxis and shuttles	$0	$0.60	$0.53	$0.58	$2.70

Mean Expenditures (per person, per trip)	2009	2010	2011	2012	2013
Buying groceries	$49	$40	$39	$48	$32
Alcohol	$0	$10	$12	$11	$5
Fuel	$103	$85	$92	$132	$108
Dining	$55	$60	$59	$63	$42
Boat and vehicle rental	$6	$3	$4	$4	$18
Airfare to NWT	-	$16	$12	$14	$12
Airfare within NWT	$106	$52	$60	$40	$27
Other Expenditures	$17	$16	$22	$19	$35
TOTAL	**$703**	**$672**	**$886**	**$718**	**$662**

Source: Trip Diary Survey QC1-19 n=603 and 2012 Kisquared. Trip Diary Phone Survey Final Report

The relatively low expenditures seen in 2013 may be related to the distribution of visitors across the various visitor segments. As described in further detail in Section 3.2, the visitor segment which spent the most per trip was Cultural Connoisseurs (average of $924 per trip). However, in 2013 this segment made up only 15% of all visitors, while in 2012 the most directly comparable segment, Avid Learners, represented 22% of trip diary holders. The lower number of visitors within this segment led to lower overall average expenditures.

For additional information about and visualizations of spending range trends from 2009 to 2013, see **Appendix E**.

3.2 2013 Trip Diary User Segments

Based on trip characteristics and activities that are important to travelers, visitors were clustered into segments, using the statistical methodology described in Section 2.6.1. Each segment is described and discussed below.

Briefly, the six segments were:

- Outdoor Adventurers: *Enjoy extreme adventure and adventure tours;*
- Comfort Seekers: *Search for the comforts of home and are not limited by cost;*
- Cultural Connoisseurs: *Participate in Aboriginal and cultural activities;*
- Roaming Retirees: *Seek quiet and safe Northern adventure at low-cost;*
- Social Sightseers: *Look for luxury while visiting family and friends*; and
- Wilderness Wanderers*: Desire a relaxing break from work in the wilderness, without a guide.*

Although the same number of visitor groups exist in 2013, these visitor groups do not perfectly match the groups identified in 2012. This suggests changes to the interests and needs of visitors travelling to NWT. The 2013 visitor segments have been named to match their characteristics and interests. Similarities and differences between 2012 and 2013 visitor segments are discussed further in Section 3.4. The distribution of the 2013 segments is outlined in Table 3-14.

Table 3-14: 2013 Distribution of Visitor Segments

	Per Cent of Visitors
Outdoor Adventurers	33%
Comfort Seekers	23%
Cultural Connoisseurs	15%
Roaming Retirees	14%
Social Sightseers	9%
Wilderness Wanderers	6%

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=475

Note that visitors who could not be easily categorized into one of these segments were not included in this distribution. These 128 uncategorized visitors are not sufficiently distinct from the average visitor to allow for separate profiling. This group's demographic attributes, interests, spending patterns, and so on are approximately the same as the overall averages for these characteristics, as reported above.

Demographic information for individual segments is provided within the description of each segment below. For a complete table of segment demographics, allowing for easy comparison between segments, see **Appendix F**.

3.2.1 Segment 1: Outdoor Adventurers

Who They Are

Outdoor Adventurers comprised one third of the visitors to NWT in 2013. They are highly educated; the majority have completed post-secondary education. [28] Outdoor Adventurers are more likely than average to be American. This group is similar to the 2012 visitor segment of the same name but differs in average age, preference for cleanliness, and willingness to participate in organized tours. In past years, cleanliness and hygiene was not an important factor to this group. This change may be attributed to the large number of retirees included in this group (44% of the segment). Outdoor Adventurers spent 7.0 nights in NWT, on average.[29] Outdoor Adventurers made a firm decision to travel 4.6 months in advance.[30] Typically, Outdoor Adventurers travelled in groups of 2.7.[31]

Table 3-15: Outdoor Adventurer Demographics

Characteristic	Categories	Percentage
Gender	Male	45.3%
	Female	54.7%
Country of Origin	Canada	74.2%
	USA	15.7%
	International	10.1%

[28] Source: Trip Diary Survey QD2 n=475.
[29] Source: Trip Diary Survey QA1 n=159.
[30] Source: Trip Diary Survey C20 and C21 n=159.
[31] Source: Trip Diary Survey QA7i n=159.

Characteristic	Categories	Percentage
Education	Less than high school	2.0%
	High school	12.6%
	Some technical college/university	4.6%
	College/technical diploma or certificate	27.8%
	University degree (undergraduate)	30.5%
	University degree (graduate)	22.5%
Household Income	Under $30,000	2.7%
	$30,000 to $49,999	17.3%
	$50,000 to $69,999	20.0%
	$70,000 to $89,999	21.3%
	$90,000 to $119,999	20.0%
	Over $120,000	18.7%

Source: Trip Diary Survey, QD2, QD4, QD7. n = 159.

Inspirations for Travel

Outdoor Adventurers were most likely to state that general touring was their primary reason for choosing NWT. The following table outlines the important and unimportant trip characteristics for Outdoor Adventurers.

Table 3-16: Outdoor Adventurer Interests

Most Important	Least Important
Unique cultural groups	Vacation packages
Physical adventure	Exciting nightlife or entertainment
Personal challenges	Festivals or sporting events
Having fun, being entertained	Viewing the Northern lights
Safety	Guided fishing
Cleanliness and hygiene	Hunting
Having a relaxing break from work	
Visiting an art gallery or museum	

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C27 n=159

Outdoor Adventurers are best described by the “extreme challenges” and “no frills autonomy” factors. This illustrates the importance of physical adventure and willingness to try activities without a guide. Luxury tends not to be important to this group. See Section 3.3 for details on the factor analysis results. Outdoor adventurers also have a moderate interest in Aboriginal tourism: 69% participated in Aboriginal tourism in 2013.[32]

[32] Source: Trip diary Survey QA7 n=159.

Trip Satisfaction and Likelihood to Return to NWT

One third (33%) of Outdoor Adventurers were return visitors to NWT and 93% of this group intended to visit again.[33] Outdoor Adventurers rated their trip satisfaction higher than any other group. On a scale of one to five, where five is very satisfied, the average rating by outdoor adventurers was 4.96.[34]

Travel Spending Patterns

Compared to other visitor segments, Outdoor Adventurers spent less than average on hotels and motels, souvenirs, bed and breakfasts, festivals and events, activities and entertainment, and dining. Outdoor Adventurers spent more than average on apartment or house rentals and spent a large amount more than any other segment on tours.

Table 3-17: Outdoor Adventurer Spending Patterns

	Average Expenditures (per person, per trip)
Pre-paid vacation package	$118.18
Hotels and motels	$45.95
Apartment or house rental	$6.08
Bed and Breakfasts	$3.31
Camping	$34.51
Festivals and events	$0.81
Activities and entertainment	$1.29
Arts and Crafts	$27.99
Souvenirs	$15.64
Tours	$217.54
Taxis and shuttles	$6.98
Buying groceries	$28.03
Alcohol	$2.19
Fuel	$93.40
Dining	$21.36
Boat and vehicle rental	$9.06
Airfare to NWT	$10.50
Airfare within NWT	$14.08
Other expenses	$10.28
Average daily total	**$667.18**

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=159

[33] Source: Trip Diary Survey QA10 n=159.
[34] Source: trip Diary Survey QA9 n=159.

3.2.2 Segment 2: Comfort Seekers

Who They Are

Comfort Seekers comprised nearly one quarter (23%) of the visitors to NWT in 2013. They tend to be well-educated and are often employed as professionals or managers.[35] Comfort Seekers are more likely than average to come from the USA or other international locations. This group tends to have above average annual incomes. They are seeking comfort, but not luxury, and are mostly interested in participating in safe activities that are not guided. Comfort Seekers tend to travel in groups of 2.6 people on average.[36]

Table 3-18: Comfort Seeker Demographics

Characteristic	Categories	Percentage
Gender	Male	52.8%
	Female	47.2%
Country of Origin	Canada	64.5%
	USA	15.0%
	International	20.6%
Education	Less than high school	0.0%
	High school	12.9%
	Some technical college/university	8.9%
	College/technical diploma or certificate	25.7%
	University degree (undergraduate)	27.7%
	University degree (graduate)	24.8%
Household Income	Under $30,000	5.0%
	$30,000 to $49,999	13.8%
	$50,000 to $69,999	23.8%
	$70,000 to $89,999	21.3%
	$90,000 to $119,999	15.0%
	Over $120,000	21.3%

Source: Trip Diary Survey, QD2, QD4, QD7. n = 107.

Inspirations for Travel

Comfort Seekers are less likely than average to state general interest or visiting family and friends as their primary reasons for travel. Comfort Seekers are not concerned with reliable and sunny weather during their travel and the cost of activities is not important to them. Comfort Seekers are moderately interested in Aboriginal tourism: in 2013, 59% of Comfort Seekers participated in

[35] Source: Trip Diary Survey QD1 and QD3 n=107.
[36] Source: Trip Diary Survey QA7 n=107.

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Aboriginal tourism.[37] The important and unimportant trip characteristics for Comfort Seekers are listed in Table 3-19.

Table 3-19: Comfort Seeker Profile

Most Important	Least Important
Learning opportunities	Luxury accommodations
Meeting new people	Exciting nightlife or entertainment
Having fun, being entertained	Interesting shopping
Sightseeing	Organized tours
Visiting museums	Vacation packages
Guided walking tours	Hunting
Hiking	Golfing
Camping	

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=107

Comfort Seekers are best described by their lack of interest in the "fair weather adventuring" and "thrifty travel" factors. This illustrates that weather is unimportant to them and that cost is also not an important factor for their trip. See Section 3.3 for more details on the factor analysis.

Trip Satisfaction and Likelihood to Return to NWT

One quarter of Comfort Seekers were return travellers to NWT and 81% stated they would return to NWT.[38] Comfort Seekers were highly satisfied with their trip, with an average satisfaction rating of 4.90 out of 5.

Travel Spending Patterns

Comfort Seekers' spending patterns represented the middle range of segments' spending, with visitors from this segment spending an average of $589 per person per trip. Comfort Seekers' higher than average expenditures on fuel, boat and vehicle rentals, and airfare within NWT suggest that this group tends to have more than one destination in NWT. Comfort Seekers spent less than average on hotels and motels, apartment or house rentals, souvenirs, tours, taxis and shuttles, and other expenses.

Table 3-20: Comfort Seeker Travel Expenditures

	Average Expenditures (per person, per trip)
Pre-paid vacation package	$18.92
Hotels and motels	$63.95
Apartment or house rental	$0.76
Bed and Breakfasts	$22.37
Camping	$41.26
Festivals and events	$1.89

[37] Source: Trip Diary Survey QC31 n=107.

[38] Source: Trip Diary Survey QA2 n=106

	Average Expenditures (per person, per trip)
Activities and entertainment	$2.67
Arts and Crafts	$41.80
Souvenirs	$14.38
Tours	$27.00
Taxis and shuttles	$0.07
Buying groceries	$42.76
Alcohol	$7.89
Fuel	$139.52
Dining	$41.86
Boat and vehicle rental	$44.42
Airfare to NWT	$45.60
Airfare within NWT	$31.44
Other expenses	$0.53
Average daily total	**$589.09**

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=107

3.2.3 Segment 3: Cultural Connoisseurs

Who They Are

Cultural Connoisseurs were 15% of 2013 visitors. Cultural Connoisseurs are interested in an educational vacation to learn about culture and history. On average, they travel in groups of 3.1.[39] Cultural Connoisseurs begin planning their trip significantly further in advance than any other group of visitors. Most members of this segment are international travellers. They tend to have graduate or post-graduate educations and professional/managerial jobs. Cultural Connoisseurs are most similar to the "Avid Learner" segment identified in 2012, though they differ in trip planning habits, interest in physical challenges, and country of origin.

Table 3-21: Cultural Connoisseur Demographics

Characteristic	Categories	Percentage
Gender	Male	41.9%
	Female	58.1%
Country of Origin	Canada	69.9%
	USA	5.5%
	International	24.7%
Education	Less than high school	0.0%
	High school	17.6%
	Some technical college/university	4.1%

[39] Source: Trip Diary Survey QA6a n=73.

Characteristic	Categories	Percentage
	College/technical diploma or certificate	23.0%
	University degree (undergraduate)	39.2%
	University degree (graduate)	16.2%
Household Income	Under $30,000	4.8%
	$30,000 to $49,999	23.8%
	$50,000 to $69,999	16.7%
	$70,000 to $89,999	21.4%
	$90,000 to $119,999	14.3%
	Over $120,000	19.0%

Source: Trip Diary Survey, QD2, QD4, QD7. n = 73.

Inspirations for Travel

Cultural Connoisseurs have a wide variety of interests. They commonly identify general interest, unguided adventure, and culture and history as their primary reasons for travel.[40] Cultural Connoisseurs are not interested in activities that involve a large number of people. They prefer modest activities such as visiting museums, hiking, and bird watching. Their interests are further outlined in Table 3-22.

Table 3-22: Cultural Connoisseur Profile

Most Important	Least Important
Relaxing break from work	Luxury accommodations
Meeting new people	Exciting nightlife entertainment
Experiencing nature with a guide	Festivals or sporting events
Unique or different cultures	Hunting
Visiting museums	Biking
Sightseeing	
Hiking	
Photography	
Bird watching	
Viewing the Northern lights	

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=73

Cultural Connoisseurs are significantly more likely to participate in Aboriginal tourism than any other segment. The majority of people in this segment (73%) participated in Aboriginal tourism activities.

Cultural Connoisseurs are best described by the “mediated experiences” and “thrifty travel” factors. This means they are looking for a comfortable way to tour NWT that is inexpensive. See Section 3.3 for further details about the factor analysis.

[40] Source: Trip Diary Survey QC20 n=73.

Trip Satisfaction and Likelihood to Return to NWT

In 2013, 19% of Cultural Connoisseurs were return visitors to NWT. Cultural Connoisseurs were highly satisfied with their visit to NWT, rating their satisfaction an average of 4.84 out of 5. In addition, 73% of Cultural Connoisseurs stated that they planned to return to NWT.

Travel Spending Patterns

In 2013, Cultural Connoisseurs did not spend money on taxis or shuttles and spent very little on festivals, events, and entertainment. Instead, Cultural Connoisseurs tended to spend much higher amounts than any other segment on pre-paid vacation packages, arts and crafts, and other expenses.

Table 3-23: Cultural Connoisseur Spending Patterns

	Average Expenditures (per person, per trip)
Pre-paid vacation package	$182.73
Hotels and motels	$67.30
Apartment or house rental	$3.34
Bed and Breakfasts	$27.95
Camping	$41.68
Festivals and events	$1.16
Activities and entertainment	$1.68
Arts and Crafts	$66.10
Souvenirs	$43.45
Tours	$20.45
Taxis and shuttles	$0.00
Buying groceries	$45.84
Alcohol	7.62
Fuel	$112.73
Dining	$48.85
Boat and vehicle rental	$14.94
Airfare to NWT	$0.58
Airfare within NWT	$38.12
Other expenses	$199.13
Average daily total	**$923.65**

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=73

3.2.4 Segment 4: Roaming Retirees

Who They Are

Roaming Retirees represented 14% of the visitors to NWT in 2013.[41] Roaming Retirees are less likely than average to come from the USA or other international locations. They are often retired; thus, cost is an important factor for the activities in which they participate. Roaming Retirees tend to travel in groups of two (57%) or four (21%).[42] This suggests that they are often couples who travel with family or with other couples. On average, they begin planning their trip 8.7 months in advance and firmly decide to travel 3.7 months in advance.[43]

Table 3-24: Roaming Retiree Demographics

Characteristic	Categories	Percentage
Gender	Male	34.4%
	Female	65.6%
Country of Origin	Canada	87.9%
	USA	4.5%
	International	7.6%
Education	Less than high school	4.7%
	High school	25.0%
	Some technical college/university	6.3%
	College/technical diploma or certificate	21.9%
	University degree (undergraduate)	26.6%
	University degree (graduate)	15.6%
Household Income	Under $30,000	2.6%
	$30,000 to $49,999	23.7%
	$50,000 to $69,999	34.2%
	$70,000 to $89,999	15.8%
	$90,000 to $119,999	7.9%
	Over $120,000	15.8%

Source: Trip Diary Survey, QD2, QD4, QD7. n = 66.

Inspirations for Travel

As illustrated in Table 3-25 (next page), Roaming Retirees tend to prefer cultural activities and unguided activities. They prefer quiet activities such as walking tours, sightseeing, and photography, and are not interested in social activities such as nightlife, festivals, or sporting events.

[41] Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=475.
[42] Source: Trip Diary Survey QA6a n=66.
[43] Source: Trip Diary Survey QC20 n=66 and Qc21 n=66.

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Table 3-25: Roaming Retiree Profile

Most Important	Least Important
Cleanliness and hygiene	Experiencing nature with a guide
Personal safety	Exciting nightlife and entertainment
Guided walking tours	Luxury accommodations
Visiting museums	Canoeing, kayaking, or rafting
Historic site visits	Festivals or sporting events
Sightseeing	Biking
Photography	Guided vehicle town tours
Shopping	Hunting

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=66

Roaming Retirees are best described by their lack of interest in “no frills autonomy” and interest in “fair weather adventuring” factors. This illustrates that they are looking to be outdoors and prefer good weather and aren’t interested in a luxury vacation. See Section 3.3 for additional findings from the factor analysis.

Trip Satisfaction and Likelihood to Return to NWT

In 2013, 42% of Roaming Retirees were return visitors to NWT. Roaming Retirees are more likely to be return visitors than any other visitor segment.[44] Roaming Retirees were highly satisfied with their visit to NWT, rating their satisfaction an average of 4.77 out of 5. Approximately half (52%) of Roaming Retirees plan to return to NWT.[45]

Travel Spending Patterns

Roaming Retirees had lower than average spending. Roaming Retirees spent more than other segments on bed and breakfasts, souvenirs, activities and entertainment, and dining, but spent less than average in most other categories. Most notably, Roaming Retirees spent very little on pre-paid vacation packages, festivals and events, tours, and other expenses.

Table 3-26: Roaming Retiree Spending Patterns

	Average Expenditures (per person, per trip)
Pre-paid vacation package	$46.67
Hotels and motels	$66.63
Apartment or house rental	$0.65
Bed and Breakfasts	$24.11
Camping	$39.18
Festivals and events	$0.16
Activities and entertainment	$6.63
Arts and Crafts	$36.05
Souvenirs	$76.69

[44] Source: Trip Diary Survey QA2 n=474.
[45] Source: Trip Diary Survey QA10 n=67.

	Average Expenditures (per person, per trip)
Tours	$10.21
Taxis and shuttles	$0.40
Buying groceries	$25.89
Alcohol	$4.78
Fuel	$118.81
Dining	$56.78
Boat and vehicle rental	$14.36
Airfare to NWT	$0.00
Airfare within NWT	$25.17
Other expenses	$7.76
Average daily total	**$560.93**

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=66

3.2.5 Segment 5: Social Sightseers

Who They Are

Social Sightseers were 9% of the visitors to NWT in 2013.[46] They are less likely than average to come from the USA or other international locations, and often are visiting family and friends. Social Sightseers enjoy luxury accommodations, organized tours, tour packages, and vacation packages. Sunny and reliable weather is important to them. On average, Social Sightseers travel in groups of 4.1.[47] Similar to other groups, Social Sightseers begin planning their trip 9.2 months in advance on average and make a firm decision to travel 3.6 months in advance.[48] Social Sightseers are most similar to the "sociable thrift-seekers" segment identified in 2012, though they differ in primary reasons for travel and interest in physical challenges and extreme adventure.

Table 3-27: Social Sightseer Demographics

Characteristic	Categories	Percentage
Gender	Male	39.5%
	Female	60.5%
Country of Origin	Canada	93.0%
	USA	2.3%
	International	4.7%
Education	Less than high school	2.4%
	High school	24.4%
	Some technical college/university	19.5%
	College/technical diploma or certificate	34.1%

46 Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=475.
47 Source: Trip Diary Survey QA6a n=43, outliers removed.
48 Source: Trip Diary Survey QC20 and QC21 n=43.

Characteristic	Categories	Percentage
	University degree (undergraduate)	19.5%
	University degree (graduate)	0.0%
Household Income	Under $30,000	9.4%
	$30,000 to $49,999	21.9%
	$50,000 to $69,999	31.3%
	$70,000 to $89,999	9.4%
	$90,000 to $119,999	12.5%
	Over $120,000	15.6%

Source: Trip Diary Survey, QD2, QD4, QD7. n = 43.

Inspirations for Travel

Social Sightseers were significantly more likely to state that visiting family and friends is a primary reason for travel than any other group. As illustrated in Table 3-28, they tended to be interested in organized vacation experiences such as tours, museums, and sightseeing. Social Sightseers tend not to be interested in outdoor adventure activities.

Table 3-28: Social sightseer Profile

Most Important	Least Important
Package tours to a destination	Golfing
Exciting nightlife and entertainment	Viewing the Northern lights
Luxury accommodations	Biking
Organized tours	Canoeing kayaking, or rafting
Shopping, purchasing arts and crafts	Guided fishing
Cleanliness and hygiene	Airplane or helicopter tours
Warm, sunny climate	Guided walking tours
Reliable weather	
Visiting museums	
Hiking	
Sightseeing	

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=43

Almost half (46%) of Social Sightseers participated in Aboriginal tourism, suggesting their interest in Aboriginal tourism is lower than Cultural Connoisseurs. Social Sightseers are best described by their interest in the “mediated experiences” and “fair weather adventuring” factors. This suggests that they prefer to sightsee outdoors comfortably and that nice weather is important to them. For more findings from the factor analysis, see Section 3.3.

Trip Satisfaction and Likelihood to Return to NWT

Social Sightseers were very satisfied with their trip and rated trip satisfaction at 4.92 out of 5, on average.[49] In 2013, 24% of Social Sightseers were return visitors to NWT.[50] In addition, 70% of Social Sightseers stated that they intended to return to NWT.

Spending Patterns

Social Sightseers had a preference for luxury, and this is reflected in their spending. Social Sightseers spent more than any other segment on pre-paid vacation packages and on hotels and motels. Social Sightseers also spent more than average on festivals and events, activities and entertainment, and souvenirs. However, this segment spent less than average on apartment or house rentals, bed and breakfasts, tours, taxis and shuttles, boat and vehicle rentals, and other expenses.

Table 3-29: Social Sightseer Spending Patterns

	Average Expenditures (per person, per trip)
Pre-paid vacation package	$245.98
Hotels and motels	$120.74
Apartment or house rental	$0.00
Bed and Breakfasts	$4.73
Camping	$29.48
Festivals and events	$3.22
Activities and entertainment	$5.09
Arts and Crafts	$27.86
Souvenirs	$50.32
Tours	$2.92
Taxis and shuttles	$1.71
Buying groceries	$25.86
Alcohol	$5.67
Fuel	$92.69
Dining	$48.56
Boat and vehicle rental	$8.51
Airfare to NWT	$0.00
Airfare within NWT	$9.02
Other expenses	$4.13
Average daily total	**$686.49**

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=43

[49] Source: Trip Diary Survey QA9 n=43
[50] Source: Trip Diary Survey QA2 n=42

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3.2.6 Segment 6: Wilderness Wanderers

Who They Are

Wilderness Wanderers were the smallest segment of visitors to NWT in 2013, making up only 6% of visitors. They are more likely than average to work in trades or as professionals or to be self-employed.[51] In 2013, most Wilderness Wanderers originated from Canada; they were less likely than average to come from the USA or other international locations. The average group size for Wilderness Wanderers was 3.1.[52]

Wilderness Wanderers prefer unguided activities (see Table 3-26, next page). Their average stay in NWT was 5.5 nights. They begin planning their trip an average of 6.6 months in advance, approximately two months less than the average of all visitor segments.[53] Wilderness Wanderers make a firm decision to travel 5.1 months in advance, on average.[54] This suggests that Wilderness Wanderers spend significantly less time thinking about their trip before making a firm decision to travel than other segments.[55] Wilderness Wanderers are most similar to the "Conservative Independent" segment identified in 2012, though they differ in trip motivators, trip planning habits, and likelihood to return (see Section 3.4 for details).

Table 3-30: Wilderness Wanderer Demographics

Characteristic	Categories	Percentage
Gender	Male	34.4%
	Female	65.6%
Country of Origin	Canada	70.4%
	USA	11.1%
	International	18.5%
Education	Less than high school	0.0%
	High school	23.1%
	Some technical college/university	11.5%
	College/technical diploma or certificate	30.8%
	University degree (undergraduate)	19.2%
	University degree (graduate)	15.4%
Household Income	Under $30,000	0.0%
	$30,000 to $49,999	13.6%
	$50,000 to $69,999	22.7%
	$70,000 to $89,999	18.2%

52 Source: Trip Diary Survey QA6a n=27.
53 Source Trip Diary Survey QC20 n=27.
54 Source: trip Diary Survey QC21 n=27.
55 Source: Trip Diary Survey QC20 and C21 n=603.

Characteristic	Categories	Percentage
	$90,000 to $119,999	22.7%
	Over $120,000	22.7%

Source: Trip Diary Survey, QD2, QD4, QD7. n = 27.

Inspirations for Travel

Wilderness Wanderers indicated that general interest and general touring were their main reasons for travelling to NWT.[56] They prefer unguided hunting, fishing, and sightseeing among other quiet activities. Having a relaxing break from work is important to this group. Wilderness Wanderers were not interested in events, festivals, or activities that would involve a large number of people.

Table 3-31: Wilderness Wanderer Profile

Most Interested	Least Interested
Relaxing break from work	Exciting nightlife and entertainment
Cleanliness and hygiene	Luxury accommodations
Sightseeing and viewing wildlife	Experiencing nature with a guide
Camping	Guided tours
Unguided vehicle town tour	Festivals or sporting events
Visiting Art Galleries	
Unguided Fishing	
Unguided Hunting	

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=27

In 2013, 46% of Wilderness Wanderers participated in Aboriginal tourism, suggesting a relatively limited interest in Aboriginal tourism for this visitor segment. Wilderness Wanderers are best described by their lack of interest in the "No frills-autonomy" or "extreme challenges" factors. This suggests that Wilderness Wanderers prefer trips that aren't physically challenging and prefer to be with others than on their own. For more findings from the factor analysis, see Section 3.3.

Trip Satisfaction and Likelihood to Return to NWT

Wilderness Wanderers were very satisfied with their trip. Their average rating of trip satisfaction was 4.73 out of 5.[57] In 2013, 30% of Wilderness Wanderers were return visitors to NWT and 52% of Wilderness Wanderers plan to return.[58]

Spending Patterns

Wilderness Wanderers had the lowest total average expenditure of any segment. None of the Wilderness Wanderers in 2013 purchased a pre-paid vacation packaged, rented an apartment or house, or rented a boat or vehicle. This segment also spent less than average on arts and crafts, tours, groceries, and other expenses. Instead, Wilderness Wanderers demonstrated their interest in casual, comfortable vacationing by spending more than average on hotels and motels, taxis and shuttles, and airfare within NWT.

[56] Source: trip Diary Survey QA7 n=27.
[57] Source: Trip Diary Survey QA9 n=27
[58] Source: Trip Diary Survey QA10 n=27

Table 3-32: Wilderness Wanderer Spending Patterns

	Average Expenditures (per person, per trip)
Pre-paid vacation package	$0.00
Hotels and motels	$113.47
Apartment or house rental	$0.00
Bed and Breakfasts	$12.43
Camping	$27.40
Festivals and events	$4.24
Activities and entertainment	$1.68
Arts and Crafts	$17.96
Souvenirs	$34.40
Tours	$35.90
Taxis and shuttles	$15.04
Buying groceries	$19.66
Alcohol	$6.52
Fuel	$114.50
Dining	$45.79
Boat and vehicle rental	$0.00
Airfare to NWT	$0.00
Airfare within NWT	$31.43
Other expenses	$5.79
Average daily total	**$486.21**

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=27

3.3 Relationships between Visitor Preferences

Factor analysis produced five factors which described visitor preferences in meaningful ways. These five factors, based on interpretation of the variables that load most highly on each, were:

- Mediated experiences;
- No-frills autonomy;
- Extreme challenges;
- Fair-weather adventuring; and
- Thrifty travel.

These factors are grouped similarly to the factors described in 2012, though extreme challenges and thrifty travel are new factors for 2013. A comprehensive presentation of which variables load on each factor is included in **Appendix B**.

3.3.1 Mediated experiences

A large number of variables load positively on factor 1, "mediated experiences." Individuals who are seeking mediated experiences value opportunities to explore and experience NWT through comfortable organized activities and tours. The variables with the highest loads include "package tours to a destination" (.616), "opportunities to take organized tours" (.582), and "high standards of cleanliness and hygiene" (.524). Weather, cost, and comfort also contributed to this factor.

Comparative analyses (crosstabulations and comparisons of averages) suggest that mediated experiences are most important to travelers who are visiting friends and family or who are interested in the wilderness, landscapes, and wildlife. Travelers who reported that they had "always wanted to visit" NWT were less likely to see mediated experiences as important.

Crosstabulations show that mediated experiences best describe Social Sightseers. Comfort Seekers value mediated experiences the least. Factor scores in Table 3-33 determine the extent to which each visitor segment values mediated experiences. A positive factor score, such as that for Social Sightseers, Cultural Connoisseurs, and Wilderness Wanderers, determines that they are interested in mediated experiences. Negative factor scores illustrate the lack of importance of mediated experiences to Roaming Retirees, Outdoor Adventurers, and Comfort Seekers.

Table 3-33: Mediated Experiences Factor Score

	Interested	Not Interested
Social Sightseers	1.975	
Cultural Connoisseurs	.640	
Wilderness Wanderers	.075	
Roaming Retirees		-.098
Outdoor Adventurers		-.378
Comfort Seekers		-.623

Source: Trip Diary Survey, n=473

3.3.2 No-frills autonomy

The second factor, "no-frills autonomy", describes an interest in opportunities to view and explore NWT casually and independently, without luxury. Factor 2 is characterized by high positive loadings from "viewing wildlife" (.613), "outstanding scenery" (.579), "parks and wilderness areas" (.529), and "personal challenges" (.486). Several variables load negatively on factor 2, including "luxury accommodations" (-.503), "exciting nightlife and entertainment" (-.412), "opportunities to take organized tours" (-.397), and "package tours to a destination" (-.366).

Comparative analyses suggest that this factor is important for travelers interested in general touring, those who reported general interest as a motivating factor for coming to NWT, and those who had always wanted to travel to NWT. No-frills autonomy is also increasingly more important to travelers with higher levels of education and those who participate in Aboriginal tourism activities.

No-frills autonomy is less important to travelers who are looking for guided fishing and guided adventure opportunities. Interestingly, no-frills autonomy is also less important to those who are interested in wilderness and isolation. This suggests that some individuals who are seeking wilderness experiences wish to do so with guides or in other non-autonomous ways.

As illustrated in Table 3-34, the no-frills autonomy factor best describes Outdoor Adventurers and Cultural Connoisseurs. Wilderness Wanderers are least interested in no-frills autonomy.

Table 3-34: No-Frills Autonomy Factor Score

	Interested	Not Interested
Outdoor Adventurers	.400	
Cultural Connoisseurs	.308	
Comfort Seekers	.012	
Social Sightseers		-.145
Roaming Retirees		-.484
Wilderness Wanderers		-1.817

Source: Trip Diary Survey, n=604

3.3.3 Extreme challenges

The third factor, "extreme challenges", is related to challenging physical adventures and outdoor activities. Travelers who find this factor important are interested in activities that challenge them physically and personally. Two variables load positively on factor 3: "physical adventure" (.447) and "personal challenges" (.430). Three variables load negatively: "high standards of cleanliness and hygiene" (-.398), "warm, sunny climate" (-.358), and "personal safety" (-.312).

Comparative analyses show that extreme challenges are most important to male travelers, students, travelers who work as managers or who are self-employed, and those who work in retail. Extreme challenges are less important to those who are retired or are homemakers.

Similarly to the findings from the segmentation analysis, cross tabulations found that Outdoor Adventurers are best described by extreme challenges. Roaming Retirees and Wilderness Wanderers were least interested in extreme challenges.

Table 3-35: Extreme Challenges Factor Score

	Interested	Not Interested
Outdoor Adventurers	.452	
Social Sightseers	.239	
Cultural Connoisseurs	.138	
Comfort Seekers	.113	
Wilderness Wanderers		-.873
Roaming Retirees		-1.217

Source: Trip Diary Survey, n=604

3.3.4 Fair weather adventuring

"Fair weather adventuring" describes an interest in challenging physical activities. However, unlike extreme challenges, this factor does not have any negative loadings on safety, cleanliness, or other elements of comfort. Fair weather adventuring is comprised of four positive loadings: "reliable weather" (.539), "warm, sunny climate" (.444), "physical adventure" (.396), and "personal challenges" (.391). This factor describes adventures in physically comfortable environments.

Fair weather adventuring is most important to travelers who are visiting friends or family, travelers who previously lived in NWT, and Canadian travelers. It is less important to visitors from the USA or other international locations. Travelers who participated in any Aboriginal tourism activities also saw fair weather adventuring as less important. Finally, fair weather adventuring was less important for those with higher education.

Fair weather adventuring was a very important factor for Social Sightseers. Roaming Retirees were also interested in fair weather adventuring. Comfort Seekers were least interested in fair weather adventuring.

Table 3-36: Fair Weather Adventuring Factor Score

	Interested	Not Interested
Social Sightseers	1.270	
Roaming Retirees	.387	
Wilderness Wanderers	.064	
Outdoor Adventurers	.057	
Cultural Connoisseurs		-.123
Comfort Seekers		-.761

Source: Trip Diary Survey, n=604

3.3.5 Thrifty travel

Finally, "thrifty travel" represents low-cost travel. The two variables which load most highly on this factor are "cost to get to destination" (.611) and "cost of accommodation and meals" (.369).

Thrifty travel is most important to visitors who are traveling for business, who are visiting friends and family, or who previously lived in NWT. Canadian travelers are also more likely to see thrifty travel as important. This factor is less important to visitors from the USA or other international locations, and is also less important to men than women.

Thrifty travel was most important to Social Sightseers. Given Social Sightseers' high average spending on pre-paid vacation packages, the cost of these packages was evidently an important factor for this segment. Comfort Seekers value thrifty travel the least. As previously mentioned, Comfort Seekers tend to have higher annual incomes and their travel expenses tend to be moderate compared to other visitor groups.

Table 3-37: Thrifty Travel Factor Score

	Interested	Not Interested
Social sightseers	.981	
Cultural connoisseurs	.410	
Outdoor Adventurers	.113	
Roaming Retirees	.097	
Wilderness wanderers		-.636
Comfort Seekers		-.740

Source: Trip Diary Survey, n=604

3.4 New and Emerging Segments

3.4.1 Business Travelers

In 2013, 2% of Trip Diary users were travelling for business purposes.[59] Of those visitors, 76% added extra days onto their business trip to tour NWT.[60] Business travelers' primary destinations were Fort Providence or Fort Simpson.[61] They traveled on their own and spent 6.14 nights in NWT, on average.[62] Business travelers reported participating in the following activities:

- Wildlife viewing: including buffalo viewing, and bird watching;
- Museums or arts activities: including visiting an art gallery, museum, or art, music, or film festival;
- Aboriginal tourism: including visiting a cultural centre, touring an Aboriginal community, and eating Aboriginal cuisine.

Business travelers tended to participate in activities that could be done independently, as opposed to those that would require a guide; such as unguided fishing, unguided walking tours, photography, and hiking.[63]

3.4.2 Changes to Existing Segments

The visitor segments identified in 2013 differ from those identified in 2012. While two visitor segments remained relatively the same (Outdoor Adventurers and Roaming Retirees), four differed in meaningful ways in the characteristics they included. These changes are described below.

Home- Grown Comfort seekers become Comfort Seekers

Home-Grown Comfort Seekers and Comfort Seekers differed noticeably in the following areas: country of origin, trip planning habits, and the types of activities they participate in (see Table 3-38, next page). Similarities between these groups included trip motivators (general interest, visiting family and friends), higher annual incomes, and interest in low-budget travel experiences.

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59 Source: Trip Diary Survey QA7 n=604.
60 Source: Trip Diary Survey QB1 n=14.
61 Source: Trip Diary Survey QA3 n=14.
62 Source: trip Diary Survey QA7i and A1 n=14.
63 Source: Trip Diary Survey QA7i and C24 n=14

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Table 3-38: Comparison of Home-grown Comfort Seekers and Comfort Seekers

	2012			2013		
Country of Origin	Canada	USA	Int.	Canada	USA	Int.
	89%	9%	2%	64%	15%	21%
Trip Planning (start thinking about trip; firm decision)	21.9 months, 8.6 months			8.7 months, 4.2 months		
Activities not interested in	Wildlife Viewing learning opportunities Packaged tours			Outdoor adventure Luxury accommodations Exciting nightlife		
Activities interested in	Outdoor adventure Comfortable/convenient travel Low budget travel			Guided tours Learning opportunities Wildlife Viewing Comfortable/convenient travel Low budget travel		

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=107 and 2012 Trip Diary User Segmentation Study.

Avid Learners become Cultural Connoisseurs

Cultural Connoisseurs were most like the 2012 "Avid Learner" segment. They were similar in level of education, annual income, group size (3), travel partners (family), and interest in arts and culture. However, Cultural Connoisseurs were more interested in Aboriginal tourism than Avid Learners. They also differed in trip planning habits, trip motivators, and country of origin (see Table 3-39).

Table 3-39: Comparison of Avid Learners and Cultural Connoisseurs

	2012			2013		
Country of Origin	Canada	USA	Int.	Canada	USA	Int.
	76%	17%	8%	70%	5%	25%
Trip planning habits (start thinking about trip, firm decision)	24.1 months, 7.1 months			9.4 months, 6.8 months		
Trip Motivators	Wilderness and isolation General Interest Always wanted to visit			General interest Unguided adventure Culture and history		

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=73

Conservative Independents become Wilderness Wanderers

In comparison to Conservative Independents, Wilderness Wanderers spent less time planning their trip. In 2013, they spent the least amount of time planning their trip, compared to all other visitor segments. In comparison to 2012, they began planning 19.9 months later and made a firm decision to travel in 1.5 months, on average (see Table 3-40, next page). This illustrates that Wilderness Wanderers were more spontaneous than Conservative Independents. Wilderness wanderers also differed in trip motivators, group size, and intent to return. While luxury was not important to Wilderness Wanderers, they were not as thrifty as Conservative Independents. Wilderness Wanderers reported that they plan on returning to NWT less than Conservative Independents. Wilderness wanderers and Conservative Independents were similar in their lack of interest in guided activities and country of origin.

Table 3-40: Comparison of Conservative Independents and Wilderness Wanderers

	2012			2013		
Country of Origin	Canada	USA	Int.	Canada	USA	Int.
	75%	19%	6%	70%	11%	19%
Trip planning habits (start thinking about trip, firm decision)	26.5 months, 7.8 months			6.6 months, 5.1 months		
Trip Motivators	General Interest Wilderness and isolation Always wanted to visit			General Interest General Touring		
Percent of return visitors	28%			30%		
Percent planning to return	72%			52%		

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=27 and 2012 Trip Diary User Segmentation Study.

<u>Sociable Thrift-Seekers become Social Sightseers</u>

Social Sightseers were most similar to Sociable Thrift-Seekers. They both had small proportions of American and International visitors and enjoyed sunny and reliable weather, and visiting family and friends was often a reason for travel. Social Sightseers traveled in larger groups, were more interested in organized tours, and were less budget-conscious than Sociable Thrift-Seekers. These segments also differed in their interest in extreme adventure and their trip planning habits (see Table 3-37).

Table 3-41: Comparison of Sociable Thrift-seekers and Social Sightseers

	2012			2013		
Country of Origin	Canada	USA	Int.	Canada	USA	Int.
	89%	7%	4%	93%	2%	5%
Trip planning habits (start thinking about trip, firm decision)	21.0 months, 7.2 months			9.2 months, 3.6 months		
Trip Motivators	Wilderness and isolation General interest Always wanted to visit			Visiting family or friends General Touring		
Average Group size	3.2			4.08		
Activities interested in	Fishing Exciting nightlife Luxury accommodations Physical adventure			Package tours Exciting nightlife Luxury accommodations Organized tours		

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	2012	2013
Activities not interested in	General touring Camping	Guided fishing Canoeing, kayaking, rafting

Source: Trip Diary Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=43 and 2012 Trip Diary User Segmentation Study.

Due to the changes in the nature of the visitor segments between those reported in 2012 and those found in 2013, a direct comparison of the distribution of visitors within each segment cannot be completed.

3.5 Dempster Highway Traveler Characteristics

In 2013, 12% of respondents received their trip diary or passport at the Dempster Highway intercept point. These Dempster Highway travelers were much less likely than average to be Roaming Retirees or Social Sightseers, and were more likely than average to be Outdoor Adventurers or Wilderness Wanderers.

Table 3-42: Dempster Highway Traveler Segments

Segment	Percentage of Dempster Highway Travelers
Social Sightseers	0%
Roaming Retirees	3%
Wilderness Wanderers	12%
Outdoor Adventurers	53%
Cultural Connoisseurs	10%
Comfort Seekers	23%

Source: Trip Diary Survey, n = 61. Total adds to greater than 100% due to rounding.

Dempster Highway travelers were more likely than average to come from the USA (16%) and much more likely to come from other international locations (29%). Compared to the overall average, Dempster Highway respondents were more likely to be male (56%).[64]

Nearly three-quarters (73%) of Dempster Highway travelers indicated that Inuvik had been their primary travel destination, while 11% reported that the highway itself was their primary destination.[65]

Dempster Highway travelers were well educated, with 76% holding a university degree (undergraduate or graduate).[66]

Dempster Highway travelers reported the highest overall satisfaction of respondents from any intercept point, providing an average satisfaction rating of 4.96 out of 5.[67]

[64] Source: Trip Diary Survey QD7 n = 72
[65] Source: Trip Diary Survey QA9 n = 74
[66] Source: Trip Diary Survey QD2 n = 70
[67] Source: Trip Diary Survey QD2 n = 70

SECTION 4: TRENDS, CONCLUSIONS, AND RECOMMENDATIONS

In 2013, length of stay and travel group size remained similar to previous years. Differences in average planning time illustrate that visitors spent less time planning their trip in 2013 than previous years. Trip planning has also moved to predominantly online sources. This suggests that travellers to NWT are more spontaneous and interested in using technology.

Visitors in 2013 participated in unguided activities more than the same activity with a guide. This suggests either that visitors prefer unguided activities or that visitors are often unaware of the opportunity to experience the activity with a guide. Increased promotion of the availability of guided activities may increase awareness, but not necessarily participation. ITI should consider monitoring participation to determine whether lack of participation in guided activities is due to visitor preference or visitor awareness.

Visitors were highly satisfied with all aspects of their trip. High satisfaction is an indicator that visitors are receiving the high quality experience they expect when travelling to NWT. Due to the consistently high satisfaction levels, however, key drivers of satisfaction could not be determined. Ratings of overall satisfaction among respondents resulted in low variation in satisfaction levels (standard deviation was only 0.37), limiting the ability of multiple regression to predict variance. For additional explanation of why key driver analysis could not be conducted, see **Appendix C**. Future surveys could be modified to further distinguish between levels of satisfaction. For example, the current five-point satisfaction scale could be modified to a ten-point scale on all questions that measure satisfaction (A8, A9, C28a-o, C29a-m). This modification may distinguish satisfaction in order to predict variance and identify drivers of satisfaction. The scales that measure importance would not need to be adjusted from 5-point to 10-point scales, but ITI could choose to do so for consistency throughout the survey.

Compared to previous years, 2013 demonstrated a low percentage of visitors travelling the Deh Cho Travel Connection Loop. A large number of visitors were unaware of the loop. This, paired with the reality that the majority of visitors were road-travellers from within Canada, suggests that some visitors who travelled the loop were unaware of doing so. ITI may choose to increase promotion of the loop to increase the number of visitors travelling the loop and visitor recall of the activity.

The percentage of visitors participating in Aboriginal tourism increased noticeably between 2011 and 2012 and again between 2012 and 2013. This coincides with the introduction of the Tourism 2015 Plan in 2011. In comparison to 2012, fewer visitors reported unavailability of an activity or that they could not find the activity as reasons for not participating in Aboriginal tourism. This suggests that Aboriginal tourism activities were more available and accessible in 2013 in comparison to previous years.

While business travellers are a small percentage (2%) of visitors in 2013, they provide an opportunity to expand tourism through the introduction of available activities and encouragement to return to NWT. Business travellers are an emerging tourism segment, as the majority added extra days to their business trip to participate in tourism activities.

Several changes in visitor segments between 2012 and 2013 were measured, including:

- Home-grown Comfort Seekers became Comfort Seekers;
- Avid Learners became Cultural Connoisseurs;
- Sociable Thrift-Seekers became Social Sightseers; and
- Conservative Independents became Wilderness Wanderers.

These changes illustrate the need to continue monitoring the types of visitors to NWT annually. This information will assist ITI and NWT tourism operators in providing meaningful and timely marketing to potential visitors.

APPENDIX A: 2013 TRIP DIARY SURVEY, WITH DESCRIPTIVE STATISTICS

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GNWT Trip Diary Phone Survey 2013
Appendix A – Survey Marginals

S2: Before we begin, are you a resident of the Northwest Territories? **IF RESPONDENT IS UNSURE, ASK**…If you were to file an income tax return, would you file in the Northwest Territories?

1. Yes .... **TERMINATE**
2. No **100%**
98. Don't know
99. No response

If S2= 1, 98, or 99, **END SURVEY**

S3: How did you travel to NWT?
1. Car/ Truck **65%**
2. Recreational Vehicle (RV) **29%**
3. Airplane .... **TERMINATE**
4. Motorcycle **2%**
5. Other **4%**
98. Don't Know
99. No Response

A. Trip Characteristics

A1: In total, how many nights did you spend in the Northwest Territories?

Mean: 7.16

1. 1 night **4%**
2. 2 nights **10%**
3. 3 nights **13%**
4. 4 nights .... **11 %**
5. 5 nights **15%**
6. 6 nights **6%**
7. 7 nights **8%**
8. 8-10 nights **16%**
9. 11-15 nights **10%**
10. 16-25 nights **5%**
11. Longer than 25 nights **2%**
98. Don't Know
99. No Response

A2. Was this your first trip to NWT?
1. Yes **71%**
2. No **29%**
98. Don't Know

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99. No Response

A3. What was your primary destination in NWT? [Do not read]
1. Inuvik **29%**
2. Yellowknife **40%**
3. Hay River **7%**
4. Fort Simpson **2%**
5. Fort Smith **2%**
6. Tuktoyaktuk **6%**
7. Fort Providence **2%**
8. Nahanni National Park **1%**
9. Fort Liard .... **>1%**
10. Twin Falls Territorial Park (including Alexandra Falls and Louise Falls) **0%**
11. Fort McPherson **0%**
12. 60th Parallel Territorial Park **0%**
13. Great Slave Lake **0%**
14. Dempster Highway **4%**
15. Enterprise .... **>1%**
16. Fort Resolution **0%**
17. Fred Henne Territorial Park .... **>1%**
18. Lady Evelyn Falls Territorial Park .... **>1%**
19. Wood Buffalo National Park **1%**
20. Little Buffalo River Falls Territorial Park .... **>1%**
21. Prelude Lake Territorial Park **0%**
22. Primary destination outside NWT **2%**
23. Other **1%**

A4: What other destinations were you considering, when planning your trip? [Do not read]
1. Yukon **64%**
2. Alaska **43%**
3. British Columbia **37%**
4. Atlantic Canada **1%**
5. Alberta **26%**
6. Other – U.S. states **2%**
7. Other – Canadian provinces **4%**
8. Outside of Canada and U.S. **1%**
9. None
98. Don't Know
99. Refused

A5: Please tell me what type of accommodations you used on your trip. (Check all that apply)
1. Campground **61%**
2. Hotel/Motel **35%**

3. Home of friends or relatives **12%**
4. Roadside Pullout **6%**
5. Wilderness camping.. **5%**
6. Outfitters lodge/camp **1%**
7. Apartment/house rental **1%**
8. Bed and Breakfast **7%**
9. Other .... **>1%**
98. Don't Know
99. No Response

A6a: Including yourself, how many people were you traveling with?
1. Alone.. **6 %**
2. 2 people travelling .... **60 %**
3. 3 people travelling **9%**
4. 4 people travelling .... **15 %**
5. 5 people travelling .... **4 %**
6. 6 people travelling .... **2 %**
7. 7 or more people travelling.. **5%**
99. No Response

If A6a= >1 ask A6b

A6b: Who were your travel companions?
1. Spouse/Partner **73%**
2. Family **28%**
3. Friends **22%**
4. Co-workers.. **2%**
98. Don't Know
99. Refused

A7: From the following list, can you please select your top three reasons for choosing to visit NWT? (Rate, 1, 2, 3)
1. General Interest **47%**
2. Guided Fishing **5%**
3. Unguided Fishing **0%**
4. Hunting **0%**
5. Guided Outdoor Adventure (eco-tourism) **1%**
6. Unguided Adventure (eco-tourism) **4%**
7. General Touring **36%**
8. Visiting Friends or Relatives **15%**
9. Business Travel **2%**
10. Wilderness, Isolation, landscape, or wildlife **16%**
11. Natural Phenomenon, event or attraction **8%**
12. Always wanted to visit **47%**
13. Culture or History **5%**
14. Dempster Highway **3%**
15. Visited Before.. **1%**

16. Used to live in NWT **1%**
16. Other **2%**
98. Don't Know
99. Refused

A8: On a scale of 1 to 5 where one is very dissatisfied and 5 is very satisfied, Can you please tell me how satisfied you were with the activities you listed as your 'top reasons' for choosing NWT?

	Very Dissatisfied				**Very Satisfied**	**DK**	**NR**
a. (Recall reason 1 A9)	1	2	3	4	5	98	99
b. (Recall reason 2 A9)	1	2	3	4	5	98	99
c. (Recall reason 3 A9)	1	2	3	4	5	98	99

(Recall not applicable for A7 1, 12 and 9)

A9: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, Can you please tell me how satisfied you were with your trip to NWT?

Very Dissatisfied				**Very Satisfied**	**DK**	**NR**
1	2	3	4	5	98	99
		2%	**8%**	**90%**		

A10: Do you plan to visit NWT again?
1. Yes **87%**
2. No **13%**
98. Don't Know
99. No Response

B. Business Travellers Only (if A7=9 only)

B1: Did you add any extra time to your business trip to site see in NWT? (prompt how many extra days?)
1. Yes **76%**
2. No **24%**
98. Don't Know **note: n=14**
99. No Response

If B1= 1 ask C1a

If B1 = 2, 98, 99 skip to D1

C. Leisure Travellers Only (if A7 is not 9)

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C1a: Did you and your travel party have any pre-paid package tour or vacation costs for this trip?
1. Yes **9%**
2. No **90%**
98. Don't Know **1%**
99. No Response

If C1a=1 ask C1b

C1b: And what was the total cost of this pre-paid package for you and your travel party?

.. Mean: $4260.29

Aside from any pre-paid package costs, how much did ***you and your travel party*** spend on the following items ***within*** the Northwest Territories?

C2: Hotels and motels **($20-$250 PER PERSON/ NIGHT)** ....**$ 128.37**
C3: Apartment or house rental **($20-$250 PER PERSON /NIGHT)** ....**$ 113.71**
C4: Bed and breakfasts **($20-$200 PER PE RSON/NIGHT)** ....**$ 87.05**
C5: Camping **(UP TO $50/NIGHT)** ....**$ 24.18**
C6: Festivals and events **(UP TO $150/DAY)** ....**$ 22.61**
C7: Activities and entertainment not including festivals and events**(UP TO $150/DAY)** ....**$ 22.89**
C8: Arts and crafts like carvings and prints **(UP TO$500 PER PERSON)** ....**$ 52.74**
C9: Souvenirs like t-shirts and mugs **(UP TO $500PER PERSON)** ....**$ 34.66**
C10: Tours**(UP TO $150 PER PERSON PER DAY)** ....**$ 632.09**
C11: Taxis and shuttles**(UP TO $150 PER PERSON PER DAY)** ....**$ 39.23**
C12: Buying groceries **(UP TO $50 PER PERSON PER DAY)** ....**$ 23.64**
C13: Alcohol**(UP TO $30 PER PERSON PER DAY)**..**$ 13.88**
C14: Fuel ***within*** the NWT **(UP TO $100 PER DAY)** ....**$ 70.34**
C15: Dining**(UP TO $100 PER PERSON PER DAY)** ....**$ 37.92**
C16: Boat and vehicle rental **($10-$200 PER DAY)** ....**$ 194.25**
C17: Airfare for your flight ***to*** the NWT **($50-$2500 PER PERSON PER DAY)** ..**$ 140.98**
C18: Airfare ***within*** the NWT**($50-$2500 PER PERSON PER DAY)** ....$ **236.12**

Note: C2 to C19 are the mean $ value and include respondents who entered $0.

If C2-C18 = less than A1 X minimum rate, or more than A1 X maximum rate prompt:

Typically the rate is (enter rate ranges) are you sure that's how much you spent?

C19: Are there any other expenditures ***you and your travel party*** incurred while traveling ***within*** the Northwest Territories that we have not yet asked about? If so, what is the total amount of those expenses?
.... **Mean: $134.38**

C20: How many months before your trip did you start thinking about travelling to NWT?

.... **Mean: 8.64 months**

C21: How many months before your trip did you make a firm decision to travel to the NWT?

.... **Mean: 4.71 months**

C22a: Which of the following sources did you use when planning your trip to the Northwest Territories? (Check all that apply)

1. NWT Explorers Guide	**10%**	13. RV Show	**1%**
2. The Milepost	**29%**	14. www.SpectacularNWT.com	**27%**
3. Auto clubs	**4%**	14. www.CampingNWT.com	**12%**
4. Travel guidebooks	**30%**	15. www.DehChoTravel.com	**4%**
5. Tourism business/operator	**17%**	16. www.CanadasNorth.com	**7%**
6. Magazine/newspaper ad	**5%**	17. Travel Website (Trip Advisor, Expedia)	**16%**
7. Magazine/newspaper article	**5%**	18. Arctic Air Television Series	**3%**
8. Word of Mouth	**17%**	19. Television Commercial	**2%**
9. NWT's Tourism 1-800 Number	**4%**	20. Other website	**5%**
10. Brochures, posters or maps	**43%**	21. Other	**14%**
11. Travel Agent	**8%**	98. None	
12. Been here before	**14%**	99. No Response	

If C22a= 13 ask C22b

C22b: Which RV Show did you attend?
1. Abbotsford Early Bird RV Show 2013 (Jan 31-Feb 3).. **50%**
2. Calgary Outdoor Adventure Show 2013 (Mar 23-24)
3. Calgary Outdoor Adventure Show 2012 (Mar 24-25)
4. Edmonton Boat and Sportsmen's Show 2013 (Mar 14-17)
5. Edmonton Motorcycle Show 2012 (Jan 13-15)
6. NWT Outdoor & Sportsmen's Show 2012 (Edm, Mar 16-17)
7. Quartzsite RV Show 2013 (Jan 19-27) **50%**
8. Quartzsite RV Show 2012 (Jan 21-29)
9. Sacramento Sportsmen's Exposition (Jan 10-13) **50%**

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10. Toronto Outdoor Adventure Show 2013 (Feb 22-24)
11. Toronto Outdoor Adventure Show 2012 (Feb 24-26)
12. Vancouver Outdoor Adventure Show 2013 (Mar 2-3) **50%**
13. Vancouver Outdoor Adventure Show 2012 (Mar 3-4)
98. Don't Know
99. No Response **n=4**

C23a: Have you watched the show Arctic Air on television?
1. Yes, watched an entire season **6%**
2. Yes, several episodes **27%**
3. Yes, one episode **6%**
4. No, never **52%**
98. Don't know **8%**
99. No Response **1%**

C23b: Do you know which company or organization sponsors the show Arctic Air? (do not read list)
1. NWT (General).................... **1%**
2. CBC **4%**
3. Airlines .... **>1%**
4. NWTT **1%**
5. GNWT.................... **1%**
6. Other Corporate Sponsors.................... **>1%**
7. Other TV networks or production companies.................... **>1%**
8. Other governments and government agencies **0%**
9. City of Yellowknife.................... **0%**
98. Don't Know.................... **92%**
99. No Response

C23c. How influential was Arctic Air in your decision to travel to the NWT?
1. Very influential **3%**
2. Somewhat influential **15%**
3. Not at all influential **82%**
98. Don't know **n=386**
99. No Response

C24: Now I would like to ask you a series of questions about things that travelers may consider when choosing a vacation destination. On a scale of one to five, where one is not at all and five is very important, please tell me how important it is to you. (**Series C**)

	Not at all important	Extremely important

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	1	2	3	4	5
a. Experiencing nature with a guide	**28%**	**24%**	**22%**	**13%**	**12%**
b. Unique or different cultural groups	**4%**	**6%**	**20%**	**40%**	**31%**
c. Physical adventure	**7%**	**15%**	**26%**	**32%**	**21%**
d. Personal challenges	**8%**	**14%**	**30%**	**33%**	**16%**
e. Learning opportunities	**4%**	**2%**	**14%**	**39%**	**41%**
f. Viewing wildlife	**1%**	**1%**	**6%**	**22%**	**71%**
g. Outstanding scenery	**1%**	**19%**	**36%**	**20%**	**17%**
h. Opportunity to purchase arts and crafts	**8%**	**19%**	**36%**	**20%**	**17%**

C25: On the same scale, please tell me how important is (**Series D**)

	1 (not at all important)	2	3	4	5 (Extremely important)
a. meeting new people	**4%**	**5%**	**15%**	**31%**	**46%**
b. Parks and wilderness areas	**1%**	**2%**	**8%**	**30%**	**59%**
c. Cost of accommodation and meals	**3%**	**11%**	**44%**	**26%**	**15%**
d. Package tours to a destination	**32%**	**36%**	**17%**	**10%**	**6%**
e. Exciting nightlife and entertainment	**60%**	**21%**	**11%**	**5%**	**3%**
f. Luxury accommodations	**58%**	**21%**	**11%**	**7%**	**3%**
g. Opportunities to take organized tours	**29%**	**34%**	**20%**	**12%**	**6%**
h. Interesting shopping	**18%**	**22%**	**32%**	**19%**	**9%**
i. Having fun, being entertained	**6%**	**8%**	**15%**	**20%**	**51%**
j. Personal safety	**2%**	**3%**	**11%**	**31%**	**52%**

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k. High standards of cleanliness and hygiene	1	2	3	4	5
	1%	**4%**	**17%**	**37%**	**41%**
l. Warm, sunny climate	1	2	3	4	5
	9%	**14%**	**45%**	**21%**	**11%**
m. Reliable weather	1	2	3	4	5
	7%	**26%**	**41%**	**16%**	**10%**
n. Cost to get to destination	1	2	3	4	5
	4%	**12%**	**35%**	**34%**	**16%**
o. Relaxing break from work	1	2	3	4	5
	5%	**4%**	**10%**	**20%**	**62%**

If they picked up their trip diary at Deh Cho, skip to C27

C26a: Did you travel along the Deh Cho Travel Connection Loop?
1. Yes **61%**
2. No **39%**
98. Don't Know
99. No Response

If C26a=2 ask C26b

C26b: Why didn't you travel the loop?
1. Not interested **8%**
2. Too far out of the way **44%**
3. Did not have time **21%**
4. Not aware of the loop **22%**
5. Construction **3%**
6. Other **3%**
98. Don't know
99. No Response

C27. From the following list, can you please let me know which activities you participated in during your visit to NWT? (Check all that apply)
1. Airplane or helicopter tour **16%**
2. Art Gallery Visit **42%**
3. Art, Music, or Film Festival **14%**
4. Viewing Northern Lights **6%**
5. Biking **5%**
6. Bird Watching **15%**
7. Boating, Cruising, or sailing **16%**
8. Buffalo Viewing **23%**
9. Camping **37%**
10. Canoeing, Kayaking, or rafting **8%**
11. Guided Fishing **3%**
12. Unguided Fishing **18%**

13. Golfing **4%**
14. Hiking **39%**
15. Historic Site Visits **33%**
16. Guided Hunting **0%**
17. Unguided Hunting .... **>1%**
18. Museum Visit **58%**
19. Photography.......... **36%**
20. Restaurant with Northern Cuisine **25%**
21. Shopping **35%**
22. Sightseeing **72%**
23. Guided Walking Tour **9%**
24. Unguided Walking town tour **35%**
25. Guided Vehicle town tour **5%**
26. Unguided vehicle town tour **27%**
27. Wildlife Viewing **50%**
28. Other.......... **1%**
98. Don't Know
99. Refused

C28: Now, using a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, please rate how satisfied you were with the following activities (Only recall activities checked from C27: 1-14) – (**Series A**)

	Very Dissatisfied				**Very Satisfied**
a. Airplane or helicopter tour	1	2	3	4	5
	0%	**0%**	**0%**	**21%**	**79%**
b. Art Gallery Visit	1	2	3	4	5
	1%	**2%**	**5%**	**23%**	**69%**
c. Art, Music, or Film Festival	1	2	3	4	5
	0%	**1%**	**9%**	**9%**	**81%**
d. Viewing Northern Lights	1	2	3	4	5
	9%	**0%**	**29%**	**25%**	**37%**
e. Biking	1	2	3	4	5
	0%	**0%**	**12%**	**21%**	**67%**
f. Bird Watching	1	2	3	4	5
	0%	**3%**	**18%**	**35%**	**44%**
g. Boating, Cruising, or sailing	1	2	3	4	5
	0%	**3%**	**11%**	**14%**	**72%**
h. Buffalo Viewing	1	2	3	4	5
	0%	**4%**	**8%**	**16%**	**72%**
i. Camping	1	2	3	4	5
	0%	**1%**	**5%**	**24%**	**70%**

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	1	2	3	4	5
j. Canoeing, Kayaking, or rafting	**0%**	**0%**	**12%**	**16%**	**72%**
l. Guided Fishing	**0%**	**0%**	**0%**	**5%**	**95%**
m. Unguided Fishing	**1%**	**3%**	**8%**	**14%**	**75%**
n. Golfing	**0%**	**0%**	**13%**	**18%**	**69%**
o. Hiking	**0%**	**1%**	**3%**	**18%**	**78%**

C29: Using the same scale again, where 1 is very dissatisfied and 5 is very satisfied, how do you feel about your recent experience with (Only recall activities check C27 15-27) – (**Series B**)

	Very Dissatisfied 1	2	3	4	**Very Satisfied** 5
a. Historic Site Visits	**0%**	**3%**	**9%**	**28%**	**60%**
b. Guided Hunting	**0%**	**0%**	**0%**	**0%**	**0%**
c. Unguided Hunting	**0%**	**0%**	**0%**	**0%**	**100%**
d. Museum Visit	**0%**	**0%**	**4%**	**17%**	**79%**
e. Photography	**0%**	**1%**	**5%**	**21%**	**74%**
f. Restaurant with Northern Cuisine	**1%**	**2%**	**13%**	**31%**	**54%**
g. Shopping	**1%**	**4%**	**18%**	**18%**	**59%**
h. Sightseeing	**0%**	**1%**	**4%**	**13%**	**82%**
i. Guided Walking Tour	**0%**	**2%**	**10%**	**11%**	**77%**
j. Unguided Walking town tour	**0%**	**1%**	**13%**	**27%**	**60%**
k. Guided Vehicle town tour	**0%**	**0%**	**9%**	**20%**	**71%**
l. Unguided vehicle town tour	**0%**	**2%**	**14%**	**16%**	**68%**

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m. Wildlife Viewing	1	2	3	4	5
	0%	**0%**	**7%**	**13%**	**79%**

C30: What, if any, activities did you participate in on your trip that I have not already mentioned?
1. Swimming **1%**
2. Visiting Friends and Family **1%**
3. Dog Sledding .... **>1%**
4. Visiting Farmer's Market .... **>1%**
4. None
98. Don't Know
99. No Response

C31a: What Aboriginal tourism activities did you participate in? (Check all that apply)
1. Aboriginal cultural events, festivals or performances **20%**
2. Visited cultural center, museum, art gallery or historical site **69%**
3. Participated in cultural workshops (i.e. tufting, basket making, carving) **5%**
4. Experienced traditional Aboriginal cuisine **19%**
5. Took a guided tour of an Aboriginal community **24%**
6. Took an unguided tour of an Aboriginal community **22%**
7. Other.. **1%**
8. None **36%**
98. Don`t Know
99. No Response

If C31a= 8 ask C31b

C31b: Why did you not participate in Aboriginal tourism activities on this trip?
1. Not interested **15%**
2. Too expensive **1%**
3. They were not available **16%**
4. They were difficult to access **3%**
5. Did not have enough time.. **32%**
6. Could not find what you were looking for **4%**
7. Not aware of what was available **29%**
8. Weather **1%**
9. Other
98. Don't Know **n=194**
99. No response

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C32: Now I'd like to ask you about your level of satisfaction with some service aspects of your trip. On a scale of 1 to 5, where one is very dissatisfied and 5 is very satisfied please rate the following (**Series E**):

	Very Dissatisfied				Very satisfied
a. Service in hotels, motels and bed and breakfasts	1 **2%**	2 **1%**	3 **14%**	4 **31%**	5 **52%**
b. Value for your money in hotels, motels and bed and breakfasts	1 **2%**	2 **3%**	3 **19%**	4 **30%**	5 **45%**
c. Campground service and amenities	1 **1%**	2 **2%**	3 **9%**	4 **31%**	5 **57%**
d. Value for money in campgrounds	1 **1%**	2 **3%**	3 **12%**	4 **25%**	5 **59%**
e. Restaurant service	1 **0%**	2 **2%**	3 **11%**	4 **36%**	5 **51%**
f. Value for money at restaurants	1 **1%**	2 **3%**	3 **18%**	4 **35%**	5 **44%**
g. The selection of arts and crafts	1 **1%**	2 **7%**	3 **22%**	4 **31%**	5 **40%**
h. The price of arts and crafts	1 **1%**	2 **10%**	3 **25%**	4 **31%**	5 **34%**

C33: And using the same scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied please rate how satisfied you were with each of the following amenities. If you or your party did not experience this service while in the Northwest Territories, please let me know. **(Series F)**

	Very Dissatisfied				Very satisfied
a. Signage	1 **1%**	2 **3%**	3 **12%**	4 **51%**	5 **33%**
b. Roads and highways	1 **4%**	2 **8%**	3 **30%**	4 **38%**	5 **20%**
c. Airports	1 **1%**	2 **1%**	3 **11%**	4 **40%**	5 **48%**
d. Visitor centres	1 **0%**	2 **1%**	3 **2%**	4 **16%**	5 **81%**
e. Variety of tours	1 **1%**	2 **2%**	3 **15%**	4 **45%**	5 **37%**

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	1	2	3	4	5
f. Cleanliness of towns	**1%**	**2%**	**13%**	**54%**	**31%**

D. Demographics

D1: Can you please tell me the where you live?
a. City? ___________
b. State/Province?_______________
c. Postal Code?_______________
99. No Response

D2: What is the highest education level you have achieved?
1. Less than high school **3%**
2. High school **18%**
3. Some technical college / university **7%**
4. College / technical diploma or certificate **26%**
5. University degree (Bachelor's / undergraduate).. **29%**
6. University degree (Masters / Ph.D./ graduate) **18%**
98. Don't know
99. No Response

D3: Which category ***best*** describes your current occupation? **READ LIST**
1. Professional **17%**
2. Management **4%**
3. Education **6%**
4. Trades **8%**
5. Clerical **3%**
6. Retail **1%**
7. Health care **5%**
8. Self-employed **4%**
9. Student.. **3%**
10. Retired **45%**
11. Or unemployed? **1%**
12. Other **1%**
13. Homemaker.. **1%**
98. Don't Know.. **0%**
99.No Response **3%**

D4: In which range is your approximate annual household income? **READ LIST**
1. Is it under $30,000 .... **5%**
2. $30,000 to less than $50,000 .... **18%**
3. $50,000 to less than $70,000 .... **25%**
4. $70,000 to less than $90,000 .... **20%**
5. $90,000 to less than $120,000 .... **15%**
6. Over $120,000 .... **17%**
98. Don't Know

99. No Response

D5: 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?

1. Yes
2. No
98. Don't Know
99. No Response

If D5= Yes Record name and contact information in separate database

D6: Is [RECALL PHONE NUMBER] the correct number to reach you?

RECORD GENDER

Male.. 1
Female.. 2

Thank you for filling out this survey!

APPENDIX B: FACTOR ANALYSIS SCREE PLOT AND EIGENVALUES

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Figure 2-1: Scree Plot

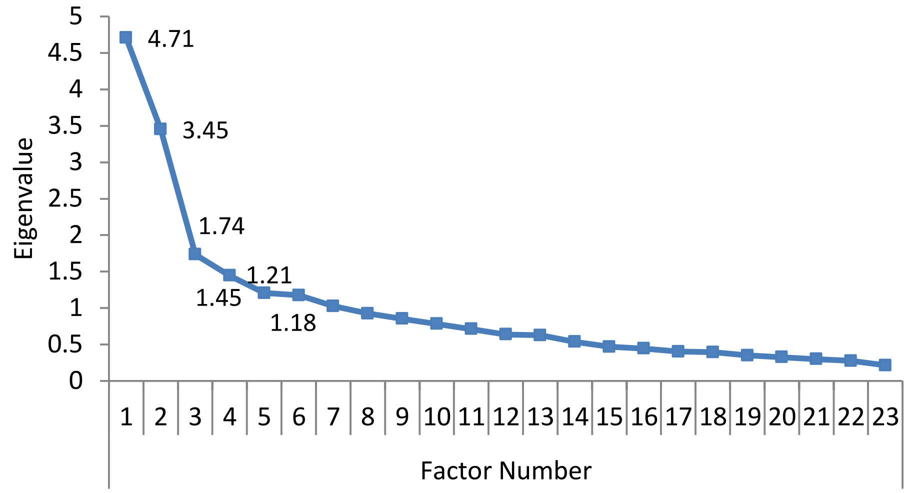

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Figure 2-2: Total Variance Explained

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings			RSSL*
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total
1	4.706	20.462	20.462	4.238	18.425	18.425	3.051
2	3.451	15.004	35.466	2.988	12.990	31.415	2.540
3	1.736	7.546	43.012	1.295	5.630	37.045	2.169
4	1.447	6.289	49.301	1.089	4.736	41.781	2.183
5	1.207	5.248	54.550	.803	3.490	45.271	2.162
6	1.176	5.114	59.664	.729	3.168	48.439	2.084
7	1.026	4.462	64.126	.499	2.170	50.608	2.454
8	.925	4.024	68.150				
9	.853	3.709	71.859				
10	.783	3.406	75.264				
11	.713	3.101	78.365				
12	.638	2.773	81.138				
13	.627	2.727	83.865				
14	.537	2.335	86.200				
15	.469	2.040	88.240				
16	.444	1.930	90.170				
17	.403	1.750	91.920				
18	.393	1.709	93.630				
19	.349	1.519	95.149				
20	.326	1.419	96.568				
21	.299	1.300	97.868				
22	.276	1.202	99.070				
23	.214	.930	100.000				

n = 603. * Rotation Sums of Squared Loadings.

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APPENDIX C: DRIVER ANALYSIS

Driver Analysis

The purpose of key driver analysis was to determine the relative impact and importance of different aspects of visitors' or clients' experiences. This information can be used to prioritize improvement strategies based on potential effect on overall satisfaction or other outcomes. Driver analysis is based on multiple regression modelling.

Key driver analysis was an innovative addition to the 2013 Trip Diary Phone Survey analysis. Regression models were constructed using overall respondent satisfaction as the dependent variable. A variety of independent variables were explored. The primary independent variables used in constructing the regression models measured respondents' satisfaction with various aspects of their travel experiences within NWT. Additional independent variables which were explored included respondent segment (drawn from the segmentation analysis), first-time visitors, expenditures, and travel destination, among others. Control variables were inserted into the models in various combinations, and included country of origin, gender, income, and education.

No model was found which could predict variation in overall satisfaction in a statistically significant way. Two aspects of the data contributed to the analyses' inability to produce a meaningful driver analysis. First, overall satisfaction ratings were exceptionally high, with respondents reporting a mean satisfaction of 4.88 out of 5. More than 90% of all respondents rated their overall satisfaction as 5 out of 5, and no respondent rated overall satisfaction as less than 3 out of 5. As a result, the standard deviation for overall satisfaction was only 0.37. Thus, very little variance in satisfaction existed, limiting the ability of multiple regression analysis to predict this variance.

Second, issues with multiple collinearity were present among some of the questions which were intended to serve as independent variables, including the questions asking visitors to rate importance of trip characteristics and satisfaction with activities they participated in (C28a-n, C29a-m, and C32a-h). Collinearity occurs when multiple variables are measuring one construct. When high levels of collinearity are present, it is not possible to determine the specific contributions of individual variables in predicting the dependent variable (satisfaction). As a result, models using these questions were unable to achieve statistical significance. The very high satisfaction ratings observed across nearly all satisfaction variables likely contributed to collinearity.

APPENDIX D: CALL OUTCOMES BY INTERCEPT POINT

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Call Outcomes by Intercept Point
The following tables demonstrate the distribution of survey outcomes for each intercept point individually.

Table D-1: 60th Parallel - Trip Diary Call Outcomes	Overall
Completions	
Completed telephone and online	297
Non-Qualifiers	
Respondent is from NWT or arrived by air	19
Invalid Sample	
Wrong number/not in service	33
Duplicate record	7
Refusals/Not Traceable	
Visitor refusal to participate	19
Called maximum number of times	61
Respondent stated they prefer to complete survey online, however did not complete the survey.	0
Began online but did not finish	0
Email invitations were sent- no response received	13
TOTAL	**449**

Table D-2: Dempster Delta - Trip Diary Call Outcomes	Overall
Completions	
Completed telephone and online	91
Non-Qualifiers	
Respondent is from NWT or arrived by air	10
Invalid Sample	
Wrong number/not in service	15
Duplicate record	2
Refusals/Not Traceable	
Visitor refusal to participate	3
Called maximum number of times	23
Respondent stated they prefer to complete survey online, however did not complete the survey.	1
Began online but did not finish	0
Email invitations were sent- no response received	8
TOTAL	**153**

Table D-3: Fort Simpson - Trip Diary Call Outcomes	Overall
Completions	
Completed telephone and online	22
Non-Qualifiers	
Respondent is from NWT or arrived by air	8
Invalid Sample	
Wrong number/not in service	1
Duplicate record	1
Refusals/Not Traceable	
Visitor refusal to participate	1
Called maximum number of times	1
Respondent stated they prefer to complete survey online, however did not complete the survey.	0
Began online but did not finish	0
Email invitations were sent- no response received	0
TOTAL	**34**

Table D-4: Hay River VIC - Trip Diary Call Outcomes	Overall
Completions	
Completed telephone and online	14
Non-Qualifiers	
Respondent is from NWT or arrived by air	2
Invalid Sample	
Wrong number/not in service	3
Duplicate record	1
Refusals/Not Traceable	
Visitor refusal to participate	0
Called maximum number of times	4
Respondent stated they prefer to complete survey online, however did not complete the survey.	0
Began online but did not finish	0
Email invitations were sent- no response received	1
TOTAL	**25**

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Table D-5: Northern Frontier VIC - Call Outcomes	Overall
Completions	
Completed telephone and online	54
Non-Qualifiers	
Respondent is from NWT or arrived by air	11
Invalid Sample	
Wrong number/not in service	6
Duplicate record	0
Refusals/Not Traceable	
Visitor refusal to participate	3
Called maximum number of times	8
Respondent stated they prefer to complete survey online, however did not complete the survey.	0
Began online but did not finish	0
Email invitations were sent- no response received	2
TOTAL	**84**

Table D-6: Dehcho Connection Call Outcomes	Overall
Completions	
Completed telephone and online	85
Non-Qualifiers	
Respondent is from NWT or arrived by air	9
Invalid Sample	
Wrong number/not in service	30
Duplicate record	4
Refusals/Not Traceable	
Visitor refusal to participate	5
Called maximum number of times	73
Respondent stated they prefer to complete survey online, however did not complete the survey.	1
Began online but did not finish	3
Email invitations were sent- no response received	0
TOTAL	**210**

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Table D-7: Dempster Highway Passport Call Outcomes	Overall
Completions	
Completed telephone and online	40
Non-Qualifiers	
Respondent is from NWT or arrived by air	1
Invalid Sample	
Wrong number/not in service	38
Duplicate record	22
Refusals/Not Traceable	
Visitor refusal to participate	1
Called maximum number of times	16
Respondent stated they prefer to complete survey online, however did not complete the survey.	0
Began online but did not finish	0
Email invitations were sent- no response received	0
TOTAL	**118**

APPENDIX E: SPENDING RANGE TRENDS

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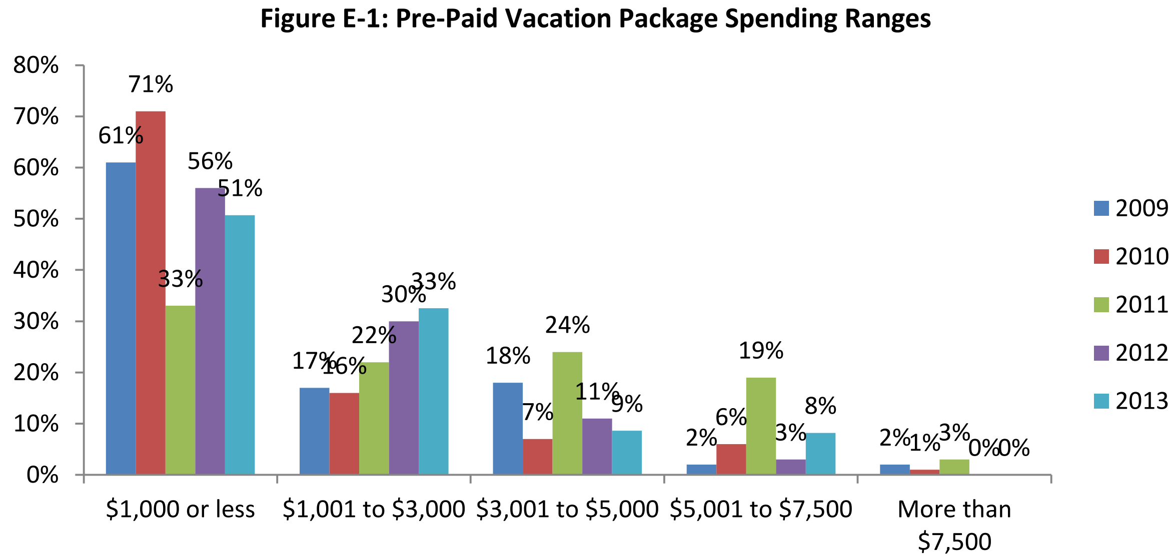
Spending Range Trends

The bar charts below demonstrate spending range trends for leisure visitors over the past five years. Note that expenditures of $0 have not been included in these bar charts.



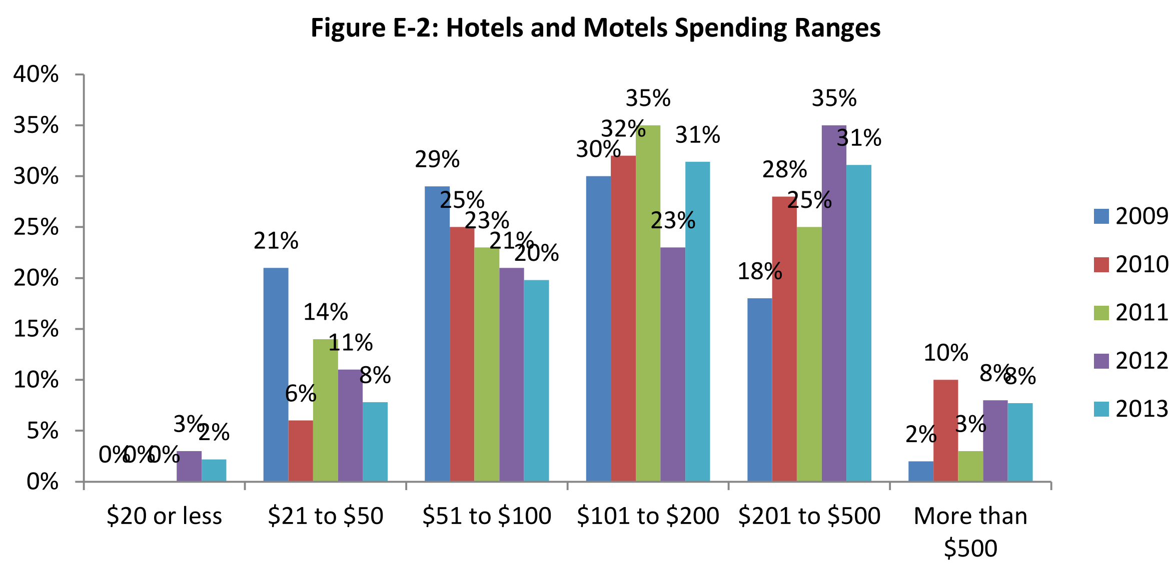


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Figure E-3: Apartment or House Rental Spending Ranges

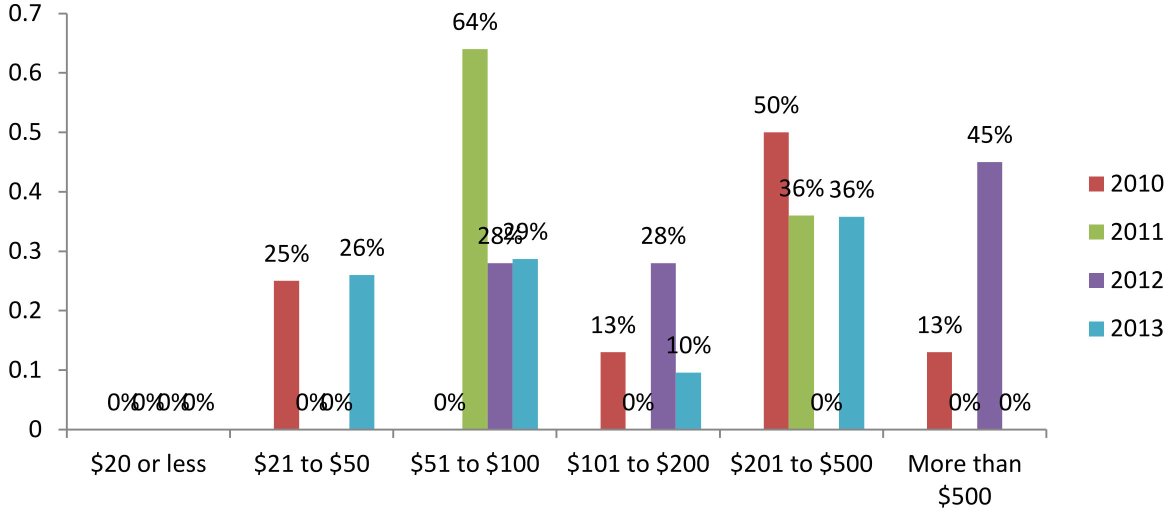

Figure E-4: Bed and Breakfast Spending Ranges

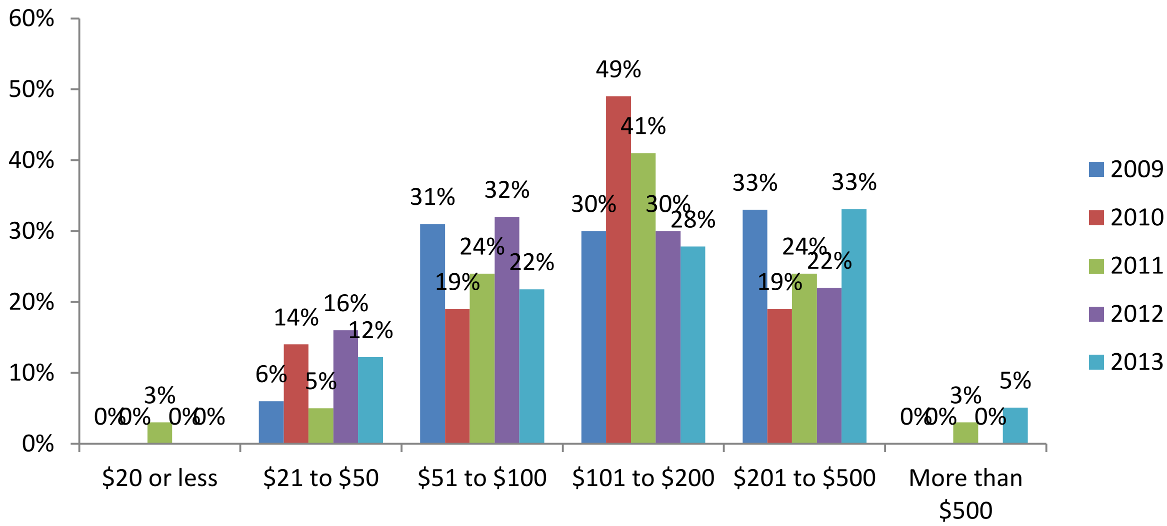

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Figure E-5: Camping Spending Ranges

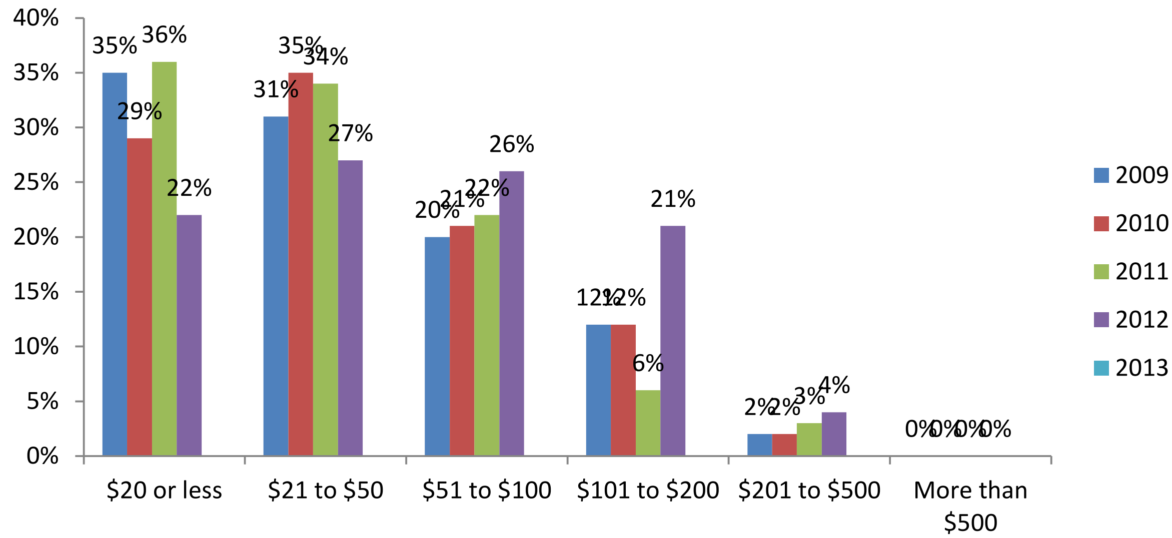

Figure E-6: Festivals and Events Spending Ranges

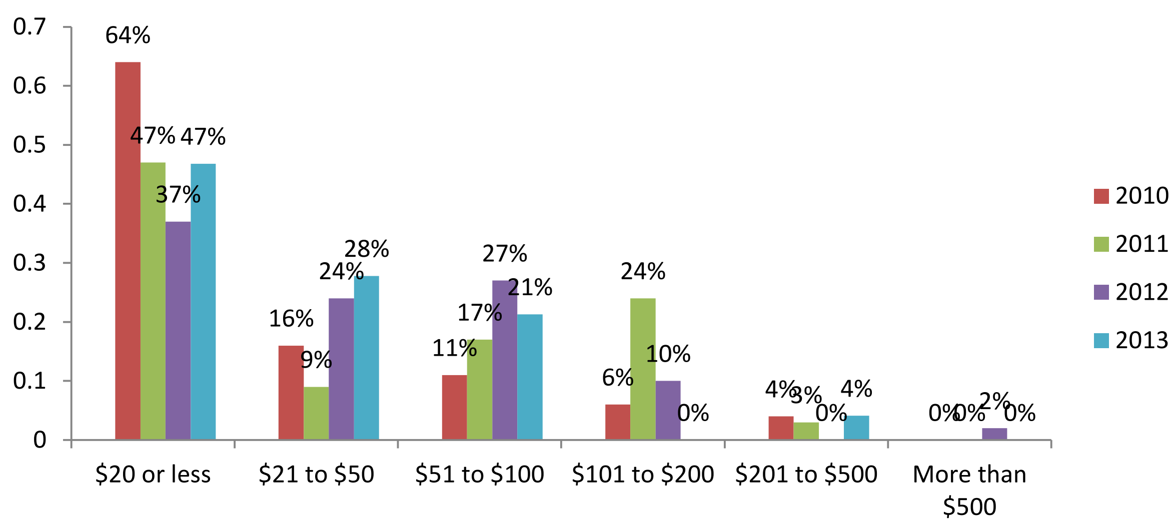

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Figure E-7: Activities and Entertainment Not Including Festivals and Events Spending Ranges

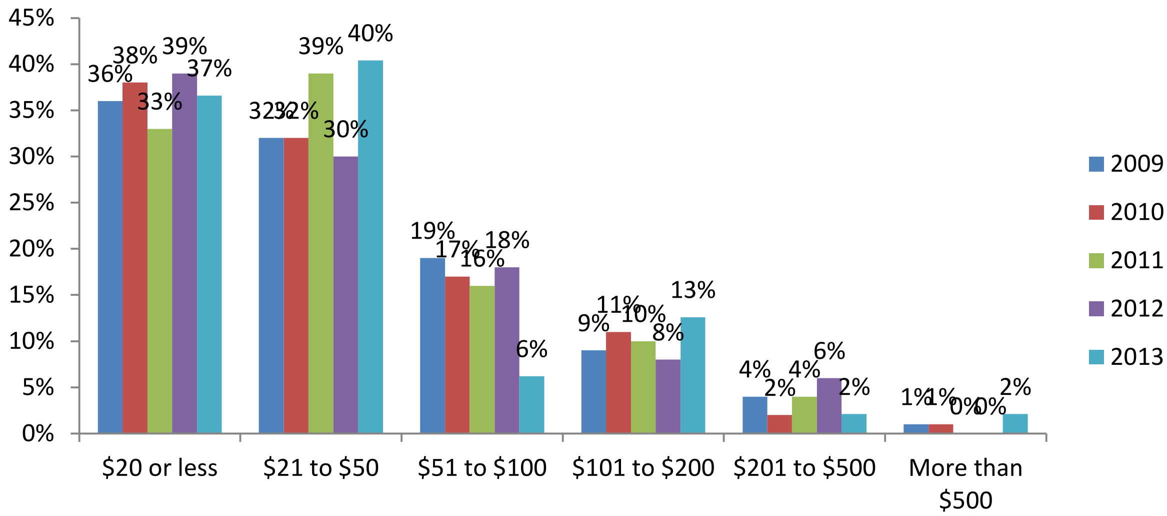

Figure E-8: Arts and Crafts Spending Ranges

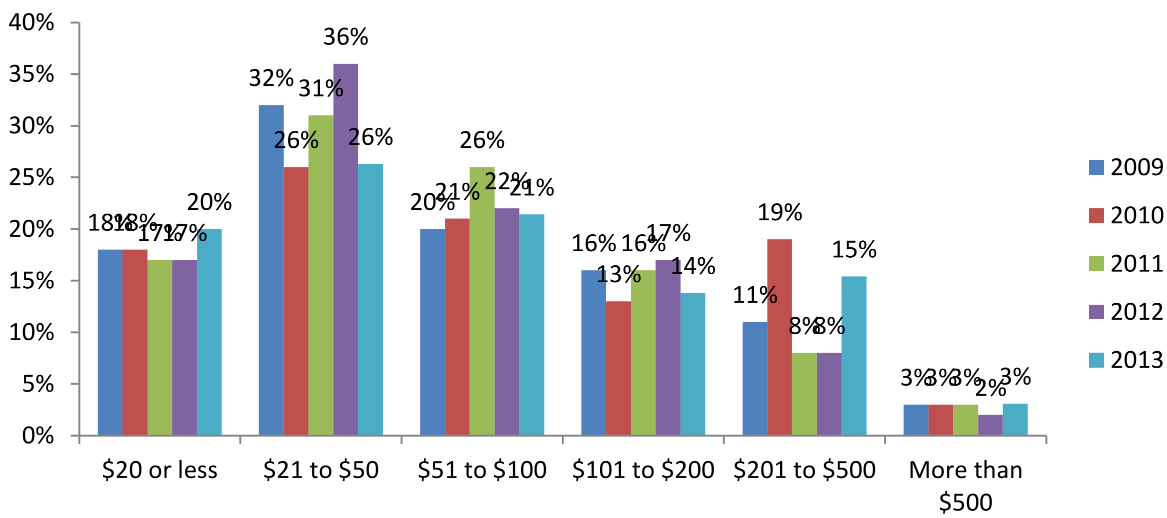

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Figure E-9: Souvenirs Spending Ranges

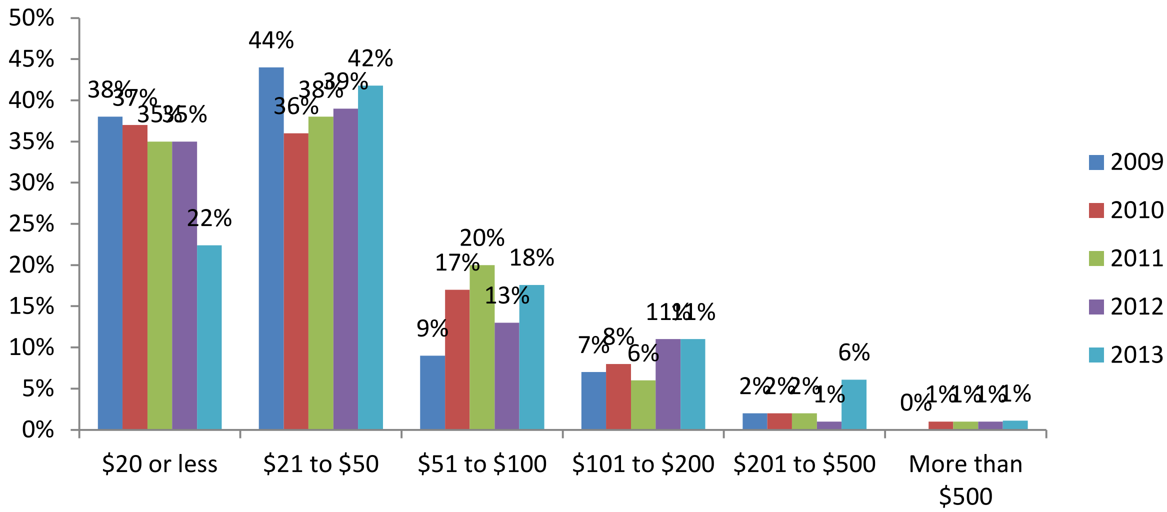

Figure E-10: Tours Spending Ranges

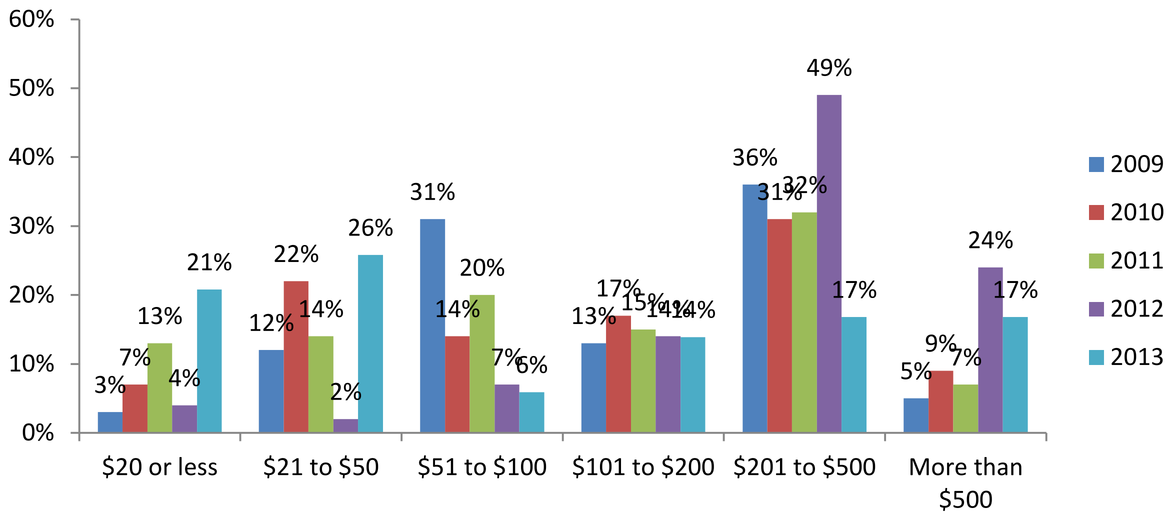

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Figure E-11: Taxis and Shuttles Spending Ranges

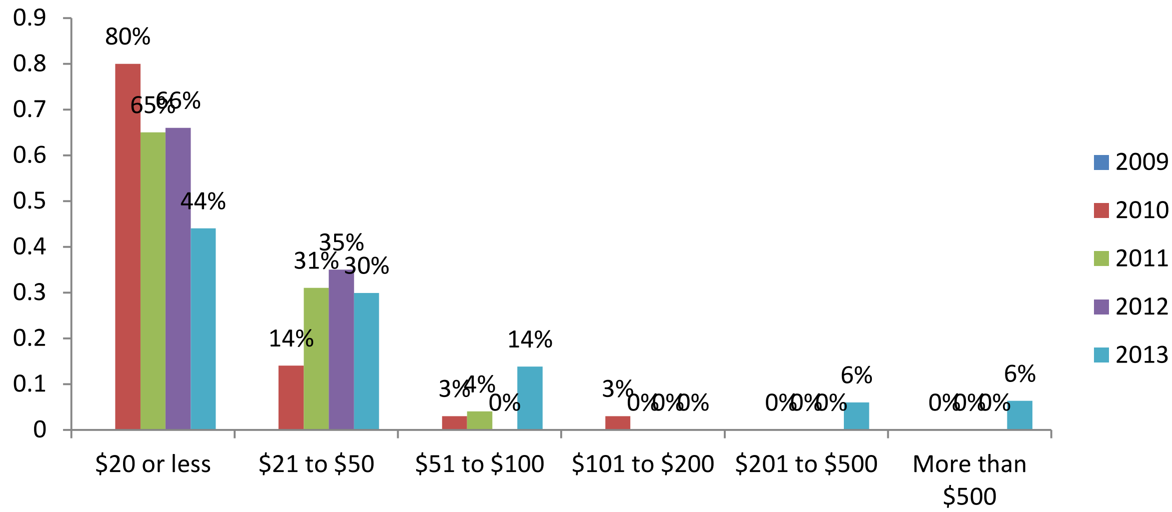

Figure E-12: Buying Groceries Spending Ranges

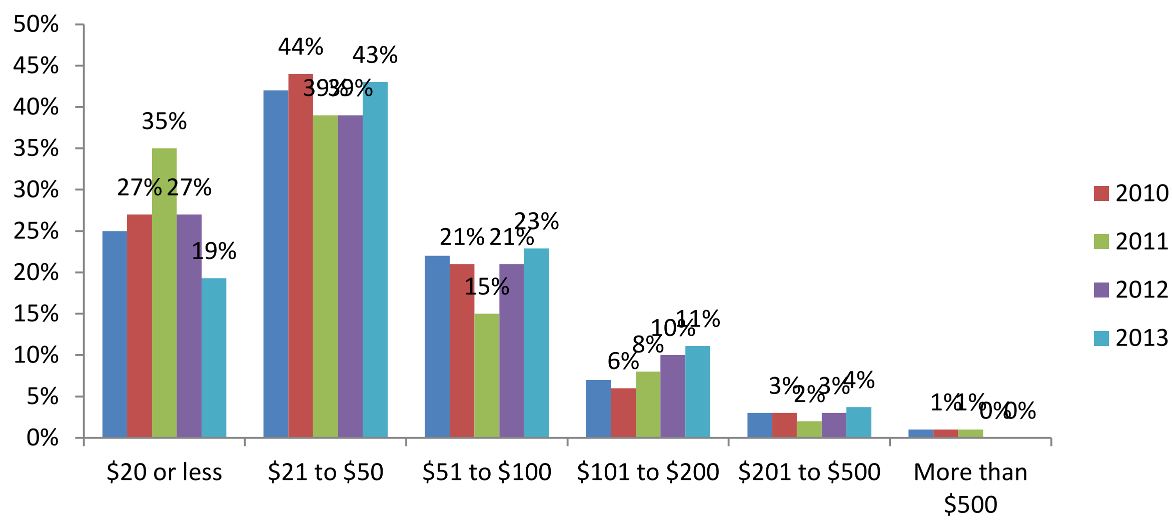

Figure E-13: Alcohol Spending Ranges

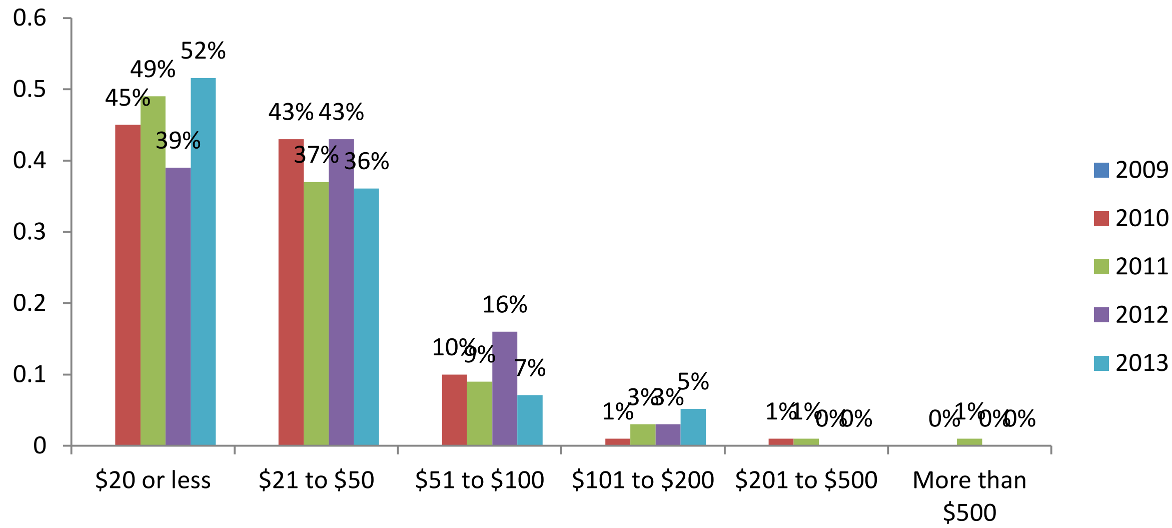

Figure E-14: Fuel Spending Ranges

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Figure E-15: Dining Spending Ranges

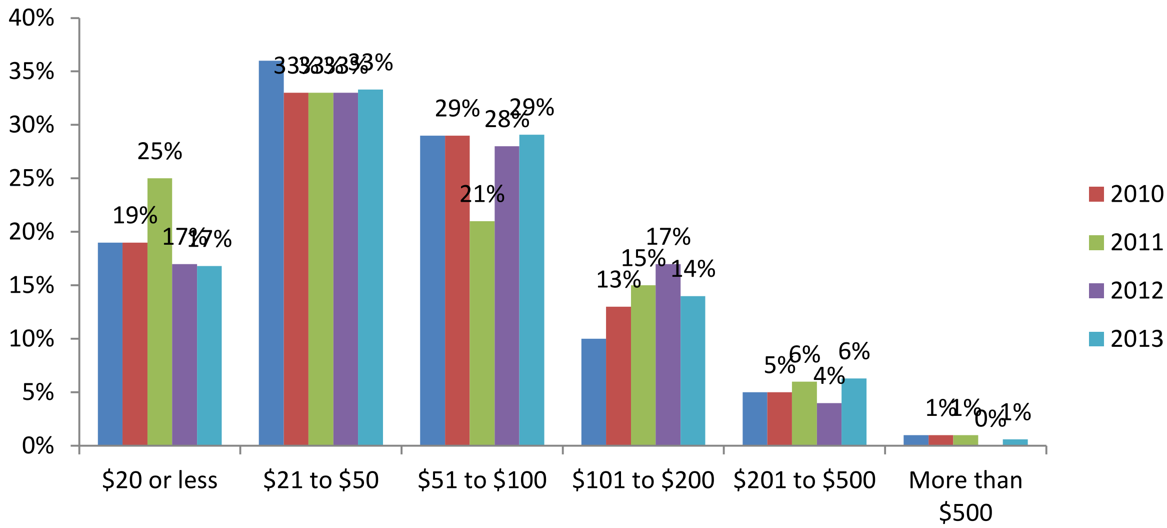

Figure E-16: Boat and Vehicle Rental Spending Ranges

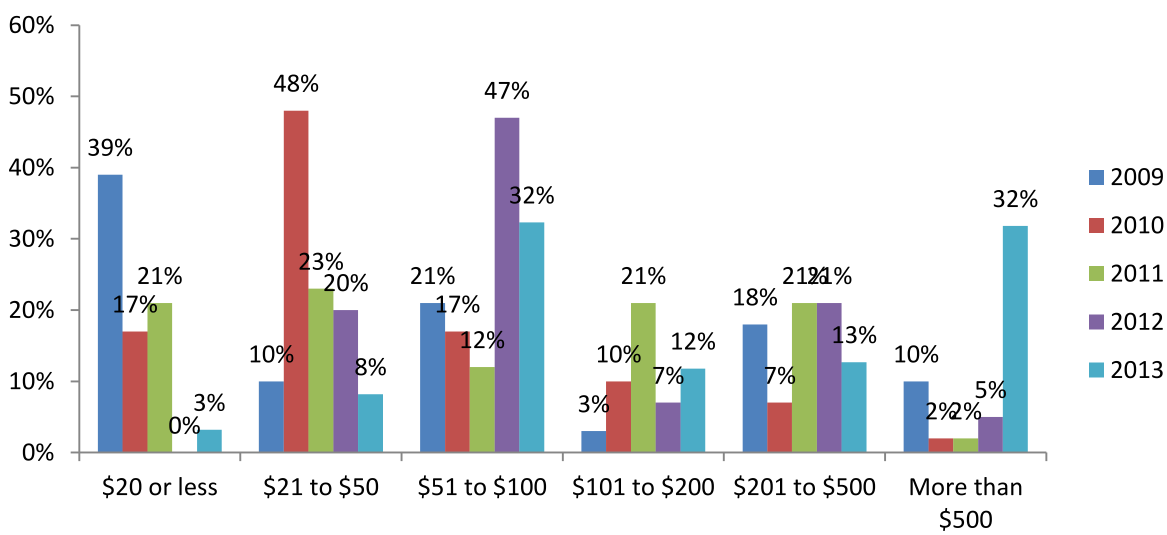

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Figure E-17: Airfare to NWT Spending Ranges

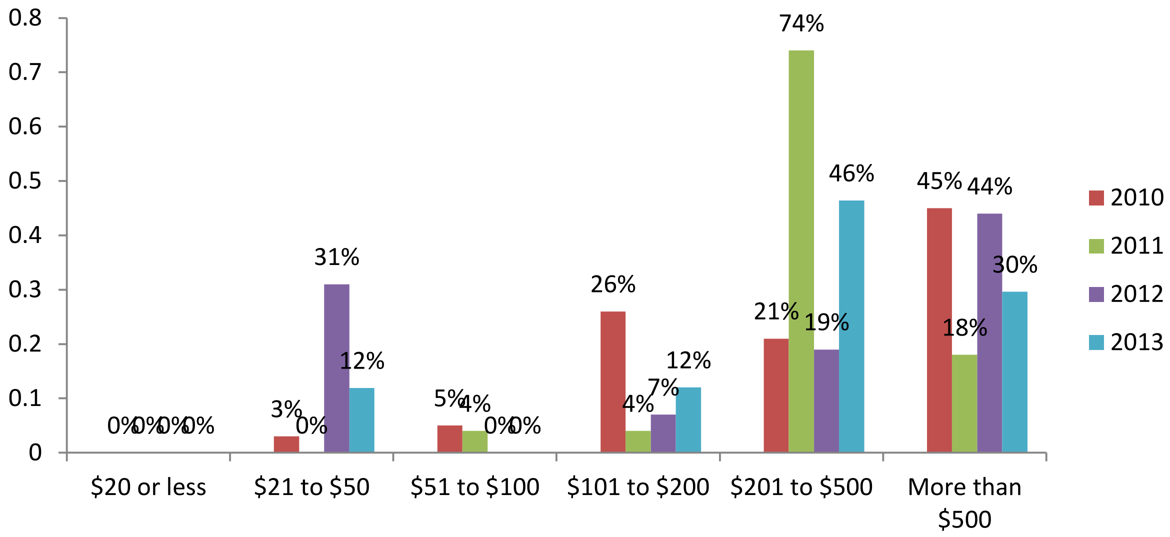

Figure E-18: Airfare Within NWT Spending Ranges

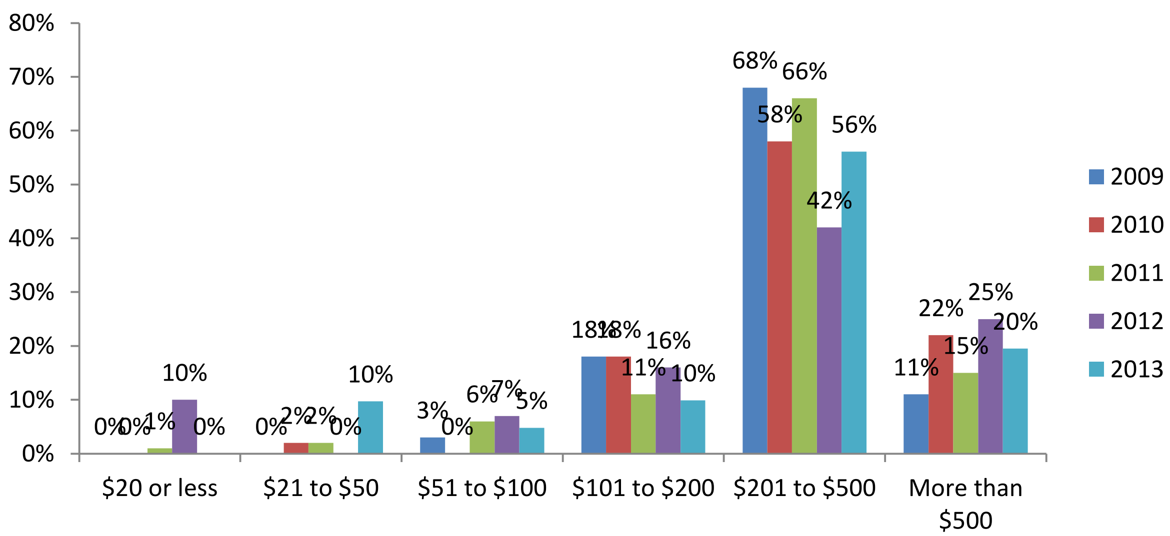

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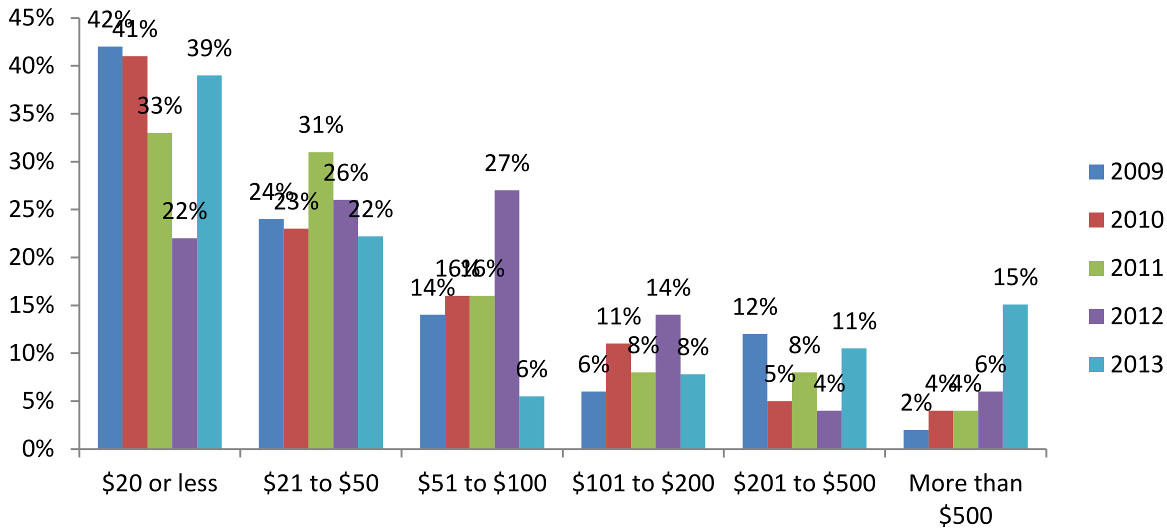
Figure E-19: Other Expenditures Spending Ranges



APPENDIX F: COMPARISON OF SEGMENT DEMOGRAPHICS

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Table F-1: Comparison of Segment Demographics

Characteristic	Categories	Outdoor Adventurer	Comfort Seeker	Cultural Connoisseur	Roaming Retiree	Social Sightseer	Wilderness Wanderer
Gender	Male	45.3%	52.8%	41.9%	34.4%	39.5%	34.4%
	Female	54.7%	47.2%	58.1%	65.6%	60.5%	65.6%
Country of Origin	Canada	74.2%	64.5%	69.9%	87.9%	93.0%	70.4%
	USA	15.7%	15.0%	5.5%	4.5%	2.3%	11.1%
	International	10.1%	20.6%	24.7%	7.6%	4.7%	18.5%
Education	Less than high school	2.0%	0.0%	0.0%	4.7%	2.4%	0.0%
	High school	12.6%	12.9%	17.6%	25.0%	24.4%	23.1%
	Some technical college/university	4.6%	8.9%	4.1%	6.3%	19.5%	11.5%
	College/technical diploma or certificate	27.8%	25.7%	23.0%	21.9%	34.1%	30.8%
	University degree (undergraduate)	30.5%	27.7%	39.2%	26.6%	19.5%	19.2%
	University degree (graduate)	22.5%	24.8%	16.2%	15.6%	0.0%	15.4%
Household Income	Under $30,000	2.7%	5.0%	4.8%	2.6%	9.4%	0.0%
	$30,000 to $49,999	17.3%	13.8%	23.8%	23.7%	21.9%	13.6%
	$50,000 to $69,999	20.0%	23.8%	16.7%	34.2%	31.3%	22.7%
	$70,000 to $89,999	21.3%	21.3%	21.4%	15.8%	9.4%	18.2%
	$90,000 to $119,999	20.0%	15.0%	14.3%	7.9%	12.5%	22.7%
	Over $120,000	18.7%	21.3%	19.0%	15.8%	15.6%	22.7%