

# 2014 ROAD VISITOR SURVEY

(FORMERLY KNOWN AS THE TRIP DIARY SURVEY)

## FINAL REPORT



*Photo credit: Dempster Highway, Benji Straker, Government of Northwest Territories*



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## EXECUTIVE SUMMARY

### ***Background***

An annual road travel survey is implemented by the Department of Industry, Tourism and Investment to understand trip characteristics and visitor demographic information about non-resident visitors who travel to the Northwest Territories (NWT) by road from May 15 to September 15. 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. This survey has been conducted annually since 2008.

Survey participants are obtained from visitors who have signed up for a Trip Diary, a Dempster Highway Passport, or a Deh Cho Travel Connection Passport. By participating in these programs, visitors agree to be contacted about their trip once they return home.

Visitors are informed about the Trip Diary Program at visitor information centres (VIC) throughout the territory and at the visitor information centre operated by the NWT in Dawson City, Yukon. The Trip Diary is a souvenir for the visitor to track their experiences and expenditures and contains useful information on the NWT road travel and a few postcards. Participants in the Trip Diary Program are surveyed shortly after they return home.

The Dempster Highway Passport is a marketing program to encourage visitors to travel the Dempster Highway. The Deh Cho Travel Connection Passport is a marketing program to encourage visitors to travel the Deh Cho Travel route visiting NWT, British Columbia, and Alberta. Both of these passports offer prizes for participation. By participating in these programs, visitors agree to be contacted about their trip. Due to the nature of these passport programs, contacts are generally surveyed at the end of the season.

From 2008 to 2012, the survey was conducted by telephone only. Starting in 2013, the survey was conducted by telephone and online. In 2010 and 2014 the road survey formed a component of a comprehensive territorial-wide Visitor Exit Survey (VES).

In 2014, the Road Survey was standardized with the other VES surveys. The 2014/2015 VES surveys target other non-resident visitors to the NWT for the purpose of aurora viewing, guided hunting, guided fishing, guided outdoor adventure, or who travelled by airplane or stayed overnight in NWT Territorial Parks; and NWT residents who travelled to another region by airplane or stayed overnight in NWT Territorial Parks. In 2014, the Road Survey was used to survey non-resident NWT Territorial Park overnight visitors as part of the 2014 VES.

In the summer of 2014, one of the worst forest fire seasons occurred in the NWT and caused numerous road and NWT Territorial Park closures. During survey administration seven of the contacted individuals indicated that they were not able to travel to NWT due to the forest fires. The road and park closures would have impacted the routes travellers were able to take.

### ***Methodology***

The Road Visitor Survey was designed to target non-resident road visitors coming to the NWT.

Visitor contact information was obtained from Trip Diary, Dempster Highway Passport, and Deh Cho Travel Connection Passport from May 15 to September 15.

In 2014, the survey was modified to obtain more information on exposure to Aboriginal tourism and business traveller activities. The 2014 survey was programmed for both telephone and online responses.

The survey sample was provided by ITI on a weekly basis starting in June. The sample included 906 cases. Following cleaning to remove any duplicate cases or incomplete contact information, the sample contained 664 cases.

In total, 445 surveys were completed. The survey was administered between July 14 and December 21, 2014, with a valid response rate of 67%.

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 2014 NWT Territorial Parks' overnight visitor population.

Three types of analysis were conducted: factor analysis, segmentation analysis, and driver analysis. Along with cross-tabulations and descriptive statistics, this analysis described visitor activities, visitor preferences, visitor segments, and satisfaction.

### ***Overall Survey Findings***

#### ***Trip Characteristics***

On average, visitors spent 5.9 nights in the NWT, with no statistically significant difference between return visitors and first time visitors. Visitors typically travelled in groups of two (55%); often with their spouse and most commonly cited Yellowknife or Inuvik as their primary destination.

#### ***Trip Planning***

Most visitors arrived by car or truck (70%); approximately one fifth (23%) of visitors drove a recreational vehicle (RV). Very few cited trade or RV shows as a source for planning their trip; six trade shows were attended by visitors in 2014. Visitors typically use the internet to plan their trip and considered Yukon, Alberta and British Columbia as alternative destinations.

### **Arctic Air**

Arctic Air was influential in the choice to travel to the NWT for 30% of visitors who had seen at least one episode of the show.

### **Trip Activities and Satisfaction**

Overall, visitors were highly satisfied with their trip and the majority (61%) plan to return to NWT. The three most popular activities were sightseeing (78%), photography (66%), and wildlife viewing (65%). 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 were familiar with the Deh Cho Travel Loop was 49% while 27% travelled the Loop. The number of visitors who indicated they travelled the Loop (27%) was the lowest compared to previous years. Almost half (48%) of visitors were unaware of the Loop, although 81% indicated they travelled to communities on the Loop which suggests a large portion may not have known if they had travelled the Loop. Those that indicated that they did not travel the Loop commonly reported that they did not have time or it was too far out of the way.

### **Aboriginal Tourism**

Participation in Aboriginal tourism decreased from 64% in 2013 to 31% in 2014. The most common Aboriginal tourism activities were visiting Aboriginal cultural events, viewing Aboriginal cultural display and experiencing traditional Aboriginal cuisine. Visitors that did not participate in Aboriginal tourism commonly indicated they had insufficient time. In comparison to 2013, fewer visitors reported that they were not aware of what was available or that they were not interested in 2014.

### **Travel Expenditures**

In 2014, visitors spent \$1,023 per person, per trip, on average. Visitors spent significantly more on travel to NWT than previous years and slightly more on alcohol and dining compared to previous years. All other expenditure categories saw a decrease compared to previous years.

### **2014 Visitor Segments**

Six visitor groups were identified in 2014. They are:

- Outdoor Adventurers: *Enjoy extreme adventure and unguided tours;*
- Comfort Seekers: *Search for the comforts of home;*
- 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.*

All groups remained relatively the same as 2013; therefore, the same group names were used in 2014.

### ***Relationships between Visitor Preferences***

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

- Mediated experiences;
- Nature experiences (new in 2014);
- Physical challenges (new in 2014);
- Travel ease (new in 2014); and
- Souvenir shopping (new in 2014).

### ***New and Emerging Segments***

Business travellers were 1% of visitors in 2014. The majority added extra days to their business trip for leisure tourism. They tended to travel on their own or in groups of five or ten and prefer activities without a guide.

### ***Trends, Conclusions and Recommendations***

Changes in tourism illustrated that visitors were spending more time planning their trip compared to trip planning in 2013. Use of online resources for trip planning increased again in 2014.

Many visitors were unaware of the Deh Cho Travel Loop which resulted in low rates of respondents reporting they travelled the loop.

Participation in Aboriginal tourism decreased from 64% in 2013 to 31% in 2014. The decrease in Aboriginal tourism activities was not the result of disinterest or visitors being unaware of available activities as interest and awareness rates have increased since 2013. Questions in the 2014 survey were modified from the 2013 survey to capture exposure to Aboriginal languages as well.

High overall trip satisfaction (average rating 4.69 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

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### Context

The Department of Industry, Tourism, and Investment (ITI) provides quality programs and services that promote and encourage NWT economic prosperity and community self-reliance. ITI is also responsible for developing, maintaining, and operating NWT Territorial Parks and some tourism 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 the 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.<sup>1</sup>

The Tourism 2015 Research and Planning program supports these goals by conducting regular surveys, analysis and market research to ensure relevant and timely information is available to the tourism industry, government and other tourism stakeholders. The Road Visitor Survey program is implemented by ITI and provides longitudinal data to monitor visitor travel to the NWT by road.

Information from the Road Visitor Travel Survey is used to understand trends in visitation and visitor satisfaction with services provided in the NWT. Survey findings provide important information to individual tourism operators in the NWT and those interested in developing a tourism business. Visitor profiles assist tourism operators in planning business expansion and modification to services so as to meet the needs and expectations of visitors. Survey findings allow individual tourism 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 Aboriginal tourism, and hospitality of the tourism workforce. The *2014 Road Visitor Survey* findings will provide guidance to ITI for future investment.

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<sup>1</sup> 2011. Northwest Territories Industry, Tourism and Investment. *Tourism 2015: New Directions for a Spectacular Future*.

## Background

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For the first five years of the program, information was collected in the form of an 18 minute telephone survey. In 2014, the survey was modified, made available to visitors either by telephone or 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, analysis of visitor satisfaction was expanded in 2014.

Profiles of NWT's visitors are developed from the Road Visitor Survey results. The profiles outline the types of activities visitors participate in, their spending patterns and the reasons for choosing NWT as a destination. In 2013, analysis identified the following visitor segments: Social Sightseers, Outdoor Adventurers, Vocation Voyagers, Roaming Retirees, Comfort-Seekers, and Cultural Connoisseurs.

In 2014, data was analyzed to determine whether these groups are still prominent and whether there are any new and emerging visitor groups.



## SECTION 2: METHODOLOGY

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### 2.1 Survey Design

The survey instrument that was used in 2013 was reviewed and modified. The 2014 survey still targeted road travellers; however the questions for business traveller and on Aboriginal tourism were expanded. As in 2013, a screening question was used to disqualify air travellers from completing the survey.

Questions added to the survey related to:

- Towns, lodges or parks visited;
- Business travel activities and who was responsible for arrangement; and
- Exposure to Aboriginal languages during the visit.

Questions removed related to:

- Company or organization that sponsors the Arctic Air television show.

As a result of the changes to the survey, the survey length was increased from 18 to 23 minutes. The modified Road Visitor Survey is provided in **Appendix A**.

### 2.2 Survey Programming and Testing

The survey was programmed into CallWeb, Malatest's CATI/CAWI computerized surveying 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 14, 2014. A total of ten 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 the NWT. Prior to and during survey administration, between June and December 2014, ITI provided the Trip Diary contacts. Sample from the other locations (Deh Cho Travel Connection Loop and the Dempster Highway) were received in October and November for the entire season.

**Figure 2-1: Sample Completions**

<b>Trip Diary - Visitor Information Centre Intercept Point</b>	<b>2013</b>	<b>2014</b>
60 <sup>th</sup> Parallel	43% (259)	54% (239)
Dempster Delta	16% (95)	9% (39)
Fort Simpson	3% (19)	3% (11)
Hay River	2% (14)	n/a
Inuvik	n/a	2% (8)
Yellowknife	8% (48)	22% (100)
<b>Passport Programs</b>		
Deh Cho Connection - Passport	16% (95)	3% (15)
Dempster Highway Passport – Dawson City	12% (74)	7% (33)
<b>Total Sample Size</b>	<b>603</b>	<b>445</b>

The sample was cleaned by removing incomplete and duplicate records. Overall, Malatest received 906 cases from ITI. After removing duplicate cases, those with missing contact information, air travellers, and residents of NWT, the final eligible sample included 664 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 July 14, 2014, and was completed on December 21, 2014. While the survey was available to be administered in over 20 languages, only English, French, Mandarin, Cantonese and German were requested by visitors. The valid response rate for this survey was 67%.

The 2014 administration was the second year in which the Road Visitor Survey was available online. Eleven respondents provided their email contact address only and, therefore, were only surveyed online.

For the 2014 Road Visitor Survey, 445 surveys were completed, 317 of which were completed by telephone and 128 online. Figure 2-2 outlines the final call outcomes for the sample.

Figure 2-2: 2014 Road Visitor Survey Sample Record	Overall
<b>Completions</b>	
Completed telephone (317) and online (128)	445
<b>Non-Qualifiers</b>	
Respondent is from NWT	19
Respondent arrived by air	43
Could not make it to NWT (Forest Fires)	7
Picked up a passport but did not visit NWT	7
<b>Invalid Sample</b>	
Wrong number/not in service (Correct number could not be found)	136
Duplicate record	24
Respondent is not available during survey administration	9
<b>Refusals/Not Traceable</b>	
Visitor refused to participate	53
Called maximum number of times (8 times)	90
Email invitations were sent- no response received (maximum number of email reminders sent (8))	73
<b>TOTAL</b>	<b>906</b>

Call outcomes for each intercept point for 2013 Trip Diary and 2014 Road Visitor Surveys are presented in **Appendix D**.

## 2.5 Outliers

Data was reviewed for outliers and illogical/inconsistent responses not detected by CallWeb or the surveyor during administration. Continuous variables were analyzed using box plots to identify outliers. Cases that constituted outliers were larger than three standard deviations from the mean. Six cases were removed from the total number of nights spent in the NWT and ten cases were removed from the total number of travel companions. The outlier analysis was applied to expenses per person. Six cases were removed from amount spent on taxis and shuttles; five cases from amount spent on apartment or house rentals and buying groceries; four cases removed from amount spent on arts and crafts, taxidermy, and airfare to NWT; three cases removed from amount spent on alcohol; two cases from camping expenses and other expenses; one case from souvenir expenses and dining. All other expenses did not have outliers greater than three standard deviations from the mean.

## 2.6 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 travellers within the NWT. Weighting was conducted along two strata of interest: a) country of origin and b) intercept point (i.e., the location at which Road Visitor participants picked up their trip diaries). Country of origin was simplified into three categories: Canadian, American, and other international travellers. Intercept was simplified into two categories: Dempster and South NWT. Population data was provided by ITI, based on the reported nationalities of visitors to NWT parks during 2014. Population data for intercept points was based on the complete population of travellers who participated in the Trip Diary or Passport programs in 2014.

The weighting procedure used in 2014 differed from that used in 2013. Therefore comparisons between 2013 and 2014 data should be made cautiously.

## 2.7 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 cross-tabulations 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.

### 2.7.1 **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 questions C24a-i and C25a-o. These questions require respondents to rate the importance of various trip characteristics. Segmentation analysis was first conducted using 2014 data only, in order to determine whether similar segments to the analyses run in previous years would be evident, or whether 2014 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 cross-tabulations and comparisons of means were used to profile each segment.

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

### 2.7.2 Factor Analysis

A factor analysis was conducted, based on the importance of 23 attributes to respondents' decisions regarding vacation destinations. These attributes were measured in questions C24a-i and C25a-o. These questions ask visitors to rate the importance of various trip characteristics. Four factors were identified which collectively explain meaningful aspects of travellers' preferences. Each of the four 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.

Five factors were found to have eigenvalues greater than 1.1. The scree plot and full listing of eigenvalues and explained variance are provided in **Appendix B**. The first factor was excluded from the analysis due to the fact that all variables loaded positively on it. Furthermore, the seventh factor was also eliminated due to the fact only one variable loaded negatively on it. The five factors identified are: organized experiences, nature experiences, fair weather, physical challenges, and shopping and entertainment. These are further described in **Section 3.3**.

### 2.7.3 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. Furthermore, the independent variables must not be highly correlated in order to determine the specific contributions of individual variables in predicting the dependent variable. A coefficient matrix revealed that the independent variables had high levels of correlation and high ratings of overall satisfaction was present among respondents which resulted in a standard deviation of only 0.61 for this dependent variable. The low variance and presence of multicollinearity limited the ability of multiple regression to predict variance. These limitations precluded the use of driver analysis for this report, which is further described in **Appendix C**.

## 2.8 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: 2014 ROAD VISITOR SURVEY FINDINGS

### 3.1 Overall Survey Findings

The Road Visitor Survey was completed by visitors from Canada, the United States of America (U.S.), and other international locations. Among 2014 respondents, after data weighting, 96% were from Canada, 3% were from U.S, and 1% were from other countries. The majority of respondents (69%) were first-time visitors to NWT, while 32% were return travellers.<sup>2</sup> Among first time visitors, the majority (59%) indicated they plan to visit NWT again, while 27% were not sure.<sup>3</sup>

Figure 3-1: Respondent Origins

Province/State/Country	Percent of Visitors
Alberta	41%
British Columbia	25%
Ontario	18%
Saskatchewan	3%
Manitoba	2%
Quebec	2%
Yukon	1%
New Brunswick	1%
Kentucky	1%
Connecticut	1%
Alaska	>1%
Washington	>1%
Virginia	>1%
Germany	>1%
Switzerland	>1%
Netherlands	>1%
Israel	>1%

Source: 2014 Road Visitor Survey QD1b n = 439.

#### 3.1.1 Trip Characteristics

The majority of visitors (72%) reported that they spent a week or less in the NWT. Visitors reported spending an average of 5.9 nights in the NWT.<sup>4</sup> For Dempster Highway traveller characteristics, see section 3.5.

<sup>2</sup> Source: 2014 Road Visitor Survey QA2 n=445.

<sup>3</sup> Source: 2014 Road Visitor Survey QA2, QA10 n=330.

<sup>4</sup> Source 2014 Road Visitor Survey QA1 n=449. N<445 due to removal of outliers.

**Figure 3-2: Number of Nights Spent in NWT**

Number of Nights	2010	2011	2012	2013	2014
Day trip	2%	4%	1%	>1%	1%
One to Seven Nights	74%	72%	70%	67%	72%
Eight to 14 Nights	20%	17%	22%	25%	24%
15 to 21 Nights	3%	5%	4%	5%	4%
Longer than 21 Nights	1%	2%	3%	3%	0%

Source: 2014 Road Visitor Survey, QA1 n = 439. n<445 due to removal of outliers. 2013 Trip Diary Survey, QA1 n = 603. 2012 Trip Diary Q2, n=440. 2011 Trip Diary Q2, n=758. 2010 Trip Diary Q2 n=544.

Overall, more respondents indicated that Yellowknife (57%) and Inuvik (14%) were the primary destination for their trip to NWT than any other destination (see Figure 3-3). Respondents who stated that Inuvik or Yellowknife was their primary destination indicated that, always wanting to visit; wilderness, isolation, landscape or wildlife; general touring; and general interest were their top reasons for choosing to visit the NWT.<sup>5</sup>

**Figure 3-3: Visitors' Top Ten Primary NWT Destinations**

Destination	2013	2014
Yellowknife	40%	57%
Inuvik	29%	14%
Hay River	7%	7%
Dempster Highway	4%	3%
Tuktoyaktuk	6%	3%
Wood Buffalo National Park	1%	2%
Fort Smith	2%	2%
Nahanni National Park	0%	2%
Fort Simpson	2%	1%
Fort Providence	2%	>1%

Source: 2014 Road Visitor Survey, QA3 n = 445. 2013 Trip Diary Survey, QA3, QA9 n = 603

Note: Percentages do not add to 100% because only the top ten destinations were reported

Survey results indicate that 81% of road visitors visited communities on the Deh Cho Travel Connection Loop. The remaining 19% travelled in the Beaufort Delta region of the NWT visiting locations such as Tuktoyaktuk, Eagle Plains, Inuvik, and Fort McPherson.

**Figure 3-4: Regional Visitation**

Region	2014
Travelled to communities in the Beaufort Delta Region	19%
Travelled to communities on the Deh Cho Loop	81%

Source: 2014 Road Visitor Survey, QA1a n = 445.

<sup>5</sup> Source 2014 Road Visitor QA7 n=445

### 3.1.2 Trip Planning

Most visitors travelled in groups of three or less, with the majority (55%) travelling in groups of two.<sup>6</sup> Some visitors (9%) travelled in groups of six or more. Visitors tended to travel with their spouses (51%), with friends (30%) and as a family (21%). The remaining visitors travelled individually (6%) or with co-workers (1%).<sup>7</sup>

Visitors were asked to identify their top three reasons for visiting NWT. The most common reason identified was having always wanted to visit NWT (55%). Some visitors also reported choosing general interest (36%), wilderness, isolation, landscape or wildlife (32%), general touring (31%), visiting friends or relatives (21%), culture or history (15%), and natural phenomenon, event or attraction (12%).<sup>8</sup> The results were consistent with the 2013 survey, as always wanted to visit, general interest, and general touring were among the top reasons selected.<sup>9</sup>

In 2014, almost one-quarter of visitors (23%) travelled by recreational vehicle.<sup>10</sup> Four percent of visitors who travelled by recreational vehicle attended an RV show. These visitors attended either the Toronto Outdoor Adventure Show or the Quartzite Arizona RV Show.<sup>11</sup> Figure 3-5 displays the modes of transportation reported by visitors.

**Figure 3-5: Mode of Transportation**

Mode of Transportation	2010	2011	2012	2013	2014
Car/Truck	69%	62%	66%	65%	68%
RV	24%	30%	25%	29%	23%
Bus	4%	4%	3%	1%	7%
Motorcycle	1%	2%	4%	1%	2%
Bicycle	n/a	n/a	n/a	4%	>1%
Other	2%	3%	3%	0%	0%
Total	100%	100%	100%	100%	100%

Source: Road Visitor Survey, QS3 n = 445. 2013 Trip Diary Survey QS3 n=603. 2012 Trip Diary Survey Q6 n=433. 2011 Trip Diary Survey Q6 n=731. 2010 Trip Diary Survey Q6 n=510.

Note: Those that arrived by air are not included.

<sup>6</sup> Source: 2014 Road Visitor Survey QA6b n=445.

<sup>7</sup> Source: 2014 Road Visitor Survey QA6a n=445 Note: Percentages are greater than 100 because respondents were able to select multiple responses. This was not a multiple response question 2006-2012.

<sup>8</sup> Source: 2014 Road Visitor Survey QA7 n=445

<sup>9</sup> Source: 2013 Trip Diary Survey Final Report.

<sup>10</sup> Source: 2014 Road Visitor Survey QS3 n=445

<sup>11</sup> Source: 2014 Road Visitor Survey QC22a n=2 and QS3 n=445



As in 2013, in 2014 most visitors also did not consider visiting other locations. Locations that were commonly considered include the Yukon, Alberta, British Columbia, and Alaska. Considering the close proximity of the Yukon and the similarities in the available activities this result is logical. Figure 3-6 indicates the other destinations considered.

**Figure 3-6: Other Destinations Considered in Trip Planning**

Destination	Percent of Visitors
None	50%
Yukon	25%
Alberta	24%
British Columbia	22%
Alaska	14%
Other Canadian Provinces	6%
Other U.S States	2%
Atlantic Canada	1%
Outside of Canada and U.S	>1%

Source: Road Visitor Survey, QA4 n = 445.

Note: The total percentage is greater than 100 because respondents were able to provide multiple responses.

Visitors to the NWT reported planning their trip 9.7 months in advance, on average, and made a firm decision on travelling to the NWT 5.2 months in advance, on average.<sup>12</sup> This average was slightly higher than the results reported in 2013, indicating that visitors planned their trips further from the time they travelled to the NWT.<sup>13</sup>

Of the many sources visitors used to plan their trip the most common source was the internet, 77%, up from 70% in 2013. For a complete breakdown of sources used in trip planning, see Figure 3-6 (next page). Similar to last year, the most common website used was [www.SpectacularNWT.com](http://www.SpectacularNWT.com) (21%). In comparison to 2013, the number of visitors that used the word of mouth increased (17% to 39%) and the number that used brochures, posters, or maps decreased (43% to 32%). As illustrated in Figure 3-7, more visitors relied on the word of mouth, NWT Explorers Guide, auto clubs, and the Milepost than last year when planning their trip.<sup>14</sup>

<sup>12</sup> Source: 2014 Road Visitor Survey QC21a n=440, due to exclusion of business travellers

<sup>13</sup> Source: 2014 Road Visitor Survey QC21 n=445 and 2013 Trip Diary Survey Q21

**Figure 3-7: Top Sources used for Trip Planning**

Source	2010	2011	2012	2013	2014
Internet (general)	55%	62%	76%	70%	77%
Word of mouth	31%	32%	38%	17%	39%
Brochures, posters or maps	36%	39%	41%	43%	32%
The Milepost	29%	26%	22%	29%	22%
Travel guidebooks	29%	23%	26%	30%	30%
NWT Explorers Guide	22%	22%	22%	16%	21%
SpectacularNWT.com	20%	16%	27%	27%	21%
NWTParks.com	n/a	n/a	n/a	12%	18%
Auto clubs	15%	13%	19%	4%	18%

Source: 2014 Road Visitor Survey, QC22 n = 440. n>445 due to business travellers (5) being excluded. 2013 Trip Diary Survey QS3 n=603. 2012 Trip Diary Survey Q6 n=440. 2011 Trip Diary Survey Q6 n=758. 2010 Trip Diary Survey Q6 n=544. Note: The total percentage is greater than 100 because respondents were able to select multiple sources. 'Internet' includes all websites reported visited by Visitors including social media.

### 3.1.3 Arctic Air's Impact on Trip Planning

In 2014, 55% of visitors indicated they had watched at least one episode of Arctic Air.<sup>15</sup> The extent to which visitors had watched Arctic Air is presented in Figure 3-8.

**Figure 3-8: Extent Visitors Watch Arctic Air**

	2013	2014
Watched an entire season	6%	13%
Watched several episodes	27%	26%
Watched one episode	6%	15%
Never watched Arctic Air	52%	44%
Don't know	8%	1%
No response	1%	>1%

Source: Road Visitor Survey, QC23a n=440, n<445 due to business travelers being excluded. Source: Trip Diary Survey, QC23a n=603.

Approximately 7% of those who had watched Arctic Air stated that the show was very influential and 23% stated that it was somewhat influential in their decision to travel to the NWT.<sup>16</sup>

### 3.1.4 Trip Activities and Satisfaction

Overall, visitors were highly satisfied with their trip to the NWT. When asked to rate their satisfaction on a scale of one to five, where five is very satisfied, the average response was 4.69.<sup>17</sup> The majority of visitors (61%) also stated that they planned to visit the NWT again while 26% were

<sup>15</sup> Source: 2014 Road Visitor Survey QC23a n=445.

<sup>16</sup> Source: Road Visitor Survey QC23b n=174

<sup>17</sup> Source: 2014 Road Visitor Survey QA9 n=445.

not sure.<sup>18</sup> Visitors who planned to visit the NWT again had an average overall satisfaction of 4.79 with no respondent providing a score of less than 3. The majority of respondents who intended to return to the NWT had a post-secondary education (74%) (college/technical diploma or university degree) and were retired (41%) or had a professional occupation (21%). Furthermore, they were most commonly between the ages of 55 and 64 (30%), female (58%) and had annual household incomes of between \$50,000 and \$70,000 (19%). Among visitors who did not intend to return to the NWT 85% were female, 61% had less than a college or technical diploma, 66% were retired and 28% had annual household incomes of over \$50,000 to \$70,000<sup>19</sup>.

Due to high levels of satisfaction amongst all visitors, statistical analyses were unable to determine the key drivers of trip satisfaction.

Figure 3-9 illustrates the percent of visitors who were either satisfied or very satisfied with the primary activities that attracted them to visit the NWT. The figure also provides the overall average level of satisfaction with these primary activities. Visitors who travelled to the NWT specifically for aurora viewing and guided fishing, were highly satisfied with the experience, rating the activities on average 5 out of 5. Visitors who did view the northern lights, but did not list it as their primary reason for visiting the NWT, rated the activity an average 3.79 out of 5 (see Figure 3-11).<sup>20</sup> While this is a positive rating, it was the activity with the second lowest mean rating of satisfaction. The lower ratings of satisfaction were most likely reported because the northern lights are difficult to see in the summer due to extended daylight hours.

<sup>18</sup> Source: 2014 Road Visitor Survey QA10 n=445.

<sup>19</sup> Source: 2014 Road Visitor Survey QA10 n=38 and QD3 n=38, D4 n=38.

<sup>20</sup> Source: Road Visitor Survey QC29d n=31.

As illustrated in Figure 3-9, visitors who travelled for hunting reasons had the lowest average satisfaction, with only 82% of visitors being satisfied with this activity.

**Figure 3-9: Satisfaction with Activities that Attract Visitors to NWT**

<b>Activity</b>	<b>Percent of Visitors Satisfied or Very Satisfied with Activity</b>	<b>Average Satisfaction</b>
Aurora Viewing	100%	5.00
Guided Fishing	100%	5.00
Visiting Friends or Relatives	100%	4.87
Unguided Outdoor Adventure	99%	4.69
Other	99%	4.68
Culture or History	99%	4.67
Unguided Fishing	99%	4.41
Natural Phenomenon, Event, or Attraction	99%	4.85
Guided Outdoor Adventure	96%	4.48
Wilderness, Isolation, Landscape or Wildlife	96%	4.61
General Interest	92%	4.53
General Touring	91%	4.69
Hunting	82%	4.51

Source: 2014 Road Visitor Survey, QA7, QA8 n = 95-6 Note: Percentage of visitors satisfied with activity represents respondents who reported "satisfied" or "very satisfied".

Figure 3-10 outlines the primary reason visitors travelled to the NWT. The most common primary reason provided by respondents was always wanted to visit (33%) while no respondent travelled to NWT primarily for guided fishing.<sup>21</sup>

**Figure 3-10: Main Driver for Travel**

Activity	2013	2014
Always Wanted to Visit	27%	33%
Visiting Friends or Relatives	11%	16%
General Interest	28%	14%
General Touring	6%	7%
Wilderness, Isolation, Landscape or Wildlife	6%	6%
Culture or History	>1%	3%
Natural Phenomenon, Event, or Attraction	3%	3%
Unguided Fishing	0%	2%
Unguided Outdoor Adventure	>1%	1%
Hunting	0%	1%
Business Travel	1%	1%
Guided Outdoor Adventure	1%	>1%
Guided Fishing	1%	0%
Aurora Viewing	n/a	0%

Source: 2014 Road Visitor Survey, QA7=1, n = 445 Note: Percentage of visitors who reported activity as the top reason for their trip.

Sightseeing and photography were the most commonly reported activities in 2014 (see Figure 3-11). Other popular activities included wildlife viewing, camping, historical site visits, museum visits, and restaurants with northern cuisine. As in 2013, the least common activity in 2014 was hunting. Figure 3-11 presents participation frequencies and average satisfaction levels.

Sightseeing and photography were the top two most common trip activities and had among the highest levels of satisfaction. Moreover, the most important trip considerations for respondents were outstanding scenery and viewing wildlife. Showcasing NWT scenery through photo tours or photo contests and displaying images on social media such as Twitter, Pinterest, Facebook and Instagram could help promote the most popular activities visitors participated in.

<sup>21</sup> : 2014 Road Visitor Survey, QA7, n = 445

**Figure 3-11: Visitor Satisfaction with Trip Activities**

<b>Activity</b>	<b>% of Visitors Participated</b>	<b>Average Satisfaction</b>
Sightseeing	78%	4.51
Photography	66%	4.55
Wildlife Viewing	65%	4.50
Historical Site Visits	63%	4.37
Museum Visits	63%	4.50
Buffalo Viewing	59%	4.54
Camping	56%	4.40
Restaurant with Northern Cuisine	54%	4.14
Shopping	54%	3.91
Hiking	48%	4.47
Art Gallery Visit	47%	4.29
Unguided Walking Tour	41%	4.34
Unguided Vehicle Town Tour	38%	4.27
Bird Watching	28%	4.10
Unguided Fishing	21%	4.47
Boating, Cruising, or Sailing	19%	4.38
Art, Music, or Film Festival	18%	4.33
Airplane or Helicopter Tour	16%	4.76
Guided Walking Tour	12%	4.77
Canoeing, Kayaking, or Rafting	9%	4.62
Viewing Northern Lights	7%	3.79
Guided Vehicle Town Tour	6%	4.73
Biking	6%	4.46
Golfing	5%	3.28
Guided Fishing	4%	4.32
Unguided Hunting	1%	4.74
Guided Hunting	1%	4.72

Source: 2014 Road Visitor Survey, QC28, C29a-o, QC30a-m n=440.

With the exception of hunting, unguided activities tended to be more popular than guided activities (see Figure 3-12).

**Figure 3-12: Participation in Guided and Unguided Activities**

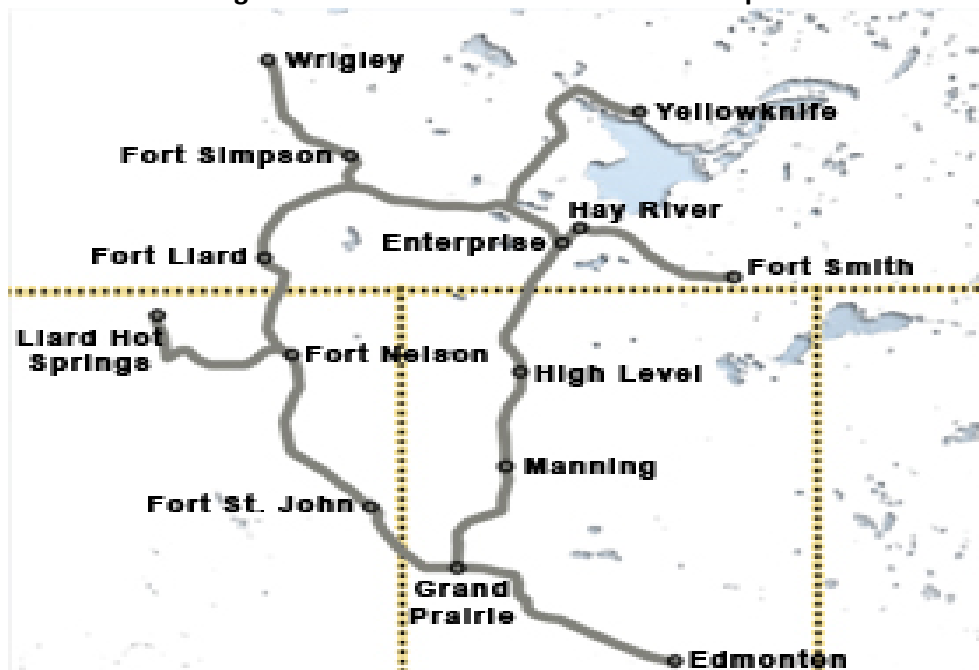
	Guided	Unguided
Fishing	4%	21%
Walking Tours	12%	41%
Vehicle Town Tours	6%	38%
Hunting	1%	1%

Source: 2014 Road Visitor Survey, QC29a-o and C30a-; n=440

### 3.1.5 Deh Cho Travel Connection Loop – 2014

Deh Cho is the Dene name for the Mackenzie River and means “Big River”.<sup>22</sup> The Deh Cho Travel Connection Loop connects Alberta, British Columbia, and the NWT. Figure 3-13 provides a map of the Deh Cho Travel Connection Loop.

**Figure 3-13: Deh Cho Travel Connection Loop<sup>23</sup>**



Approximately 27% of visitors reported that they were familiar and travelled the Deh Cho Loop in 2014. Twenty-three percent indicated that they were familiar with it, but did not travel the Loop this year. Among visitors who did not travel the Loop, but were familiar with it 48% were repeat visitors. Visitors driving from Alberta to the NWT will drive on a portion of the Loop. In 2014, approximately 48% of visitors were not familiar with the Loop, but 27% of road visitors indicated they travelled the Loop. The majority (81%) of road travellers indicated they visited locations on the

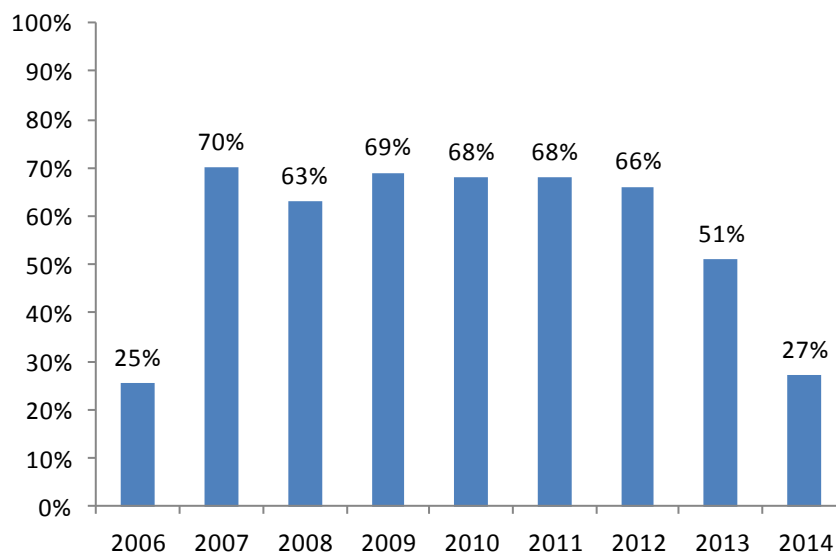
<sup>22</sup> 2013. Deh Cho Travel Connection. [http://dehchotravel.ca/learn\\_more/history.php](http://dehchotravel.ca/learn_more/history.php)

<sup>23</sup> Deh Cho Travel Connection Loop <http://www.canadream.com/dehcho/>

Deh Cho Connection Loop which indicates that the majority of respondents were unaware of the loop.

In 2014, the percentage of visitors reporting they travelled the Deh Cho Loop was the lower than 2013 and the lowest among years on record (see Figure 3-14).

**Figure 3-14: Percent of Visitors that Were Familiar With and Travelled the Deh Cho Loop 2006-2014**



Source: Trip Diary Survey 2006-2012 Q94, 2013 QC26a n=566, 2014 Road Visitor Survey Q26 n=441

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

- Did not have time (49%);
- Too far out of the way (29%); and
- Other (12%).

Given the large number of visitors who reported they were not familiar with the Deh Cho Loop, the marketing strategy for this region should be reviewed.

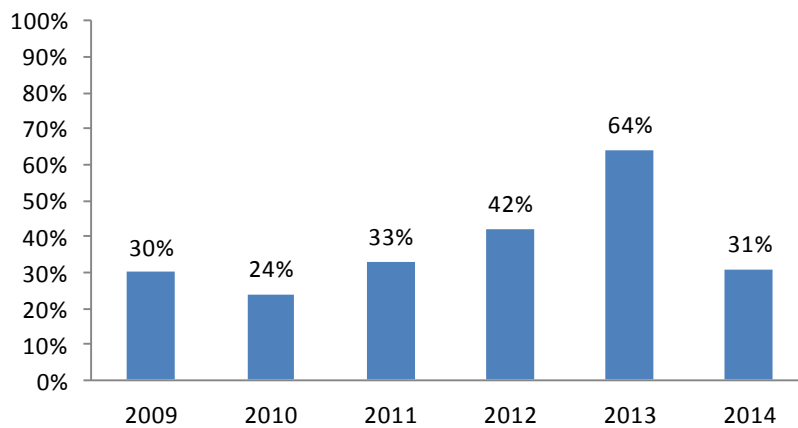
No statistically significant or noteworthy differences in demographic information and trip characteristics were found between those who did and did not travel the Deh Cho Loop in 2014. Road and park closures caused by the forest fires in 2014 may be the reason for the low percentage of visitors who travelled the Loop. Campgrounds were a more common type of accommodation used by those who travelled the Loop (73%), compared to those who did not travel the Loop but were familiar with it (45%); while, hotels or motels were more commonly used by those who did not travel the Loop (48%) compared to those who travelled the Loop (31%). Moreover, roadside pullout (20%) accommodations were more common amongst those who travelled the Loop, compared to those who did not travel the Loop (10%).



### 3.1.6 Aboriginal Tourism Activities

Over the past few years, ITI has been working to advance and develop Aboriginal tourism in the NWT. This includes addressing the growing demands for tourism products based on authentic Aboriginal culture.<sup>24</sup> Between 2009 and 2011, approximately 30% of visitors participated in Aboriginal tourism activities each year. Participation in Aboriginal tourism decreased from 64% in 2013 to 31% in 2014 (see Figure 3-15). Prior to 2014, Aboriginal tourism had increased each year from 24% in 2010 to a high of 64% in 2013. The questions regarding Aboriginal tourism in the 2014 Road Visitor Survey were modified from previous survey years which may have impacted the results.

**Figure 3-15: Participation in Aboriginal Tourism 2009-2014**



Source: 2014 Road Visitor Survey QC31 n=440 and 2012. Kisquared. Trip Diary Phone Survey Final Report  
 Note: The Aboriginal Tourism question was added to the survey in 2009.

Respondents who participated in Aboriginal tourism were more commonly female (65%), over the age of 55 (69%), university graduates (58%) (Undergraduate or graduate), and had an annual household income of between \$50,000 and \$70,000 (24%).<sup>25</sup>

<sup>24</sup> 2014. Government of Northwest Territories Industry, Tourism and Investment. Aboriginal Tourism. <http://www.iti.gov.nt.ca/content/aboriginal-tourism>

<sup>25</sup> 2014 Road Visitor Survey, QD2, QD3, QD4, QD5, QD8 n=190.

**Figure 3-16: Demographics of Respondents who Participated in Aboriginal Tourism**

Characteristic	Categories	Percentage
<b>Gender</b>	Male	35%
	Female	65%
<b>Age</b>	Under 19	2%
	20-34 years	9%
	35-44 years	8%
	45-54 years	13%
	55-64 years	34%
	Over 65	35%
<b>Country of Origin</b>	Canada	95%
	USA	2%
	International	2%
<b>Education</b>	Less than high school	4%
	High school	9%
	Some technical college/university	4%
	College/technical diploma or certificate	25%
	University degree (undergraduate)	39%
	University degree (graduate)	19%
<b>Household Income</b>	Under \$30,000	9%
	\$30,000 to \$49,999	14%
	\$50,000 to \$69,999	24%
	\$70,000 to \$89,999	20%
	\$90,000 to \$119,999	14%
	Over \$120,000	20%

Source: 2014 Road Visitor Survey, QD2, QD3, QD4, QD5, QD8 n=105-137.

Visitors were asked to indicate the Aboriginal tourism activities in which they participated (see Figure 3-17). The most popular Aboriginal tourism activity was visiting a cultural event, celebration or performance (67% of those that participated in Aboriginal tourism). Viewing an Aboriginal cultural display was also a popular activity, with 55% of visitors participating.<sup>26</sup>

<sup>26</sup> Percentages are of those that participated in Aboriginal tourism.

**Figure 3-17: Aboriginal Tourism Activities**

	Percent of Visitors
<b>Participated in Aboriginal Tourism</b>	<b>31%</b>
Visited Aboriginal cultural events, celebrations or performances	67%
Viewed an Aboriginal cultural display	55%
Experienced traditional Aboriginal foods	38%
Aboriginal cultural craft activities	21%
Took a guided interpretive tour	18%
Other	15%
<b>Did not participate in Aboriginal activities</b>	<b>67%</b>

Source: Road Visitor Survey, QC34b n=137

Note: The total percentage is greater than 100 because respondents were able to select multiple responses.

Cross-tabulations determined differences in visitors who did and did not participate in Aboriginal tourism. The following are statistically significant differences and describe three groups that were more likely to participate in Aboriginal tourism:

- Visitors who travelled by bus (68%) compared to 29% who travelled by car or truck and 32% who travelled by recreational vehicle.
- Visitors whose primary destination was Tuktoyaktuk (71%) or Inuvik (52%), compared to visitors who travelled to Yellowknife (23%) or Hay River (13%). Those who visited Yellowknife as their primary destination commonly did not participate in Aboriginal tourism due to unavailability (31%), and lack of awareness of what was available (27%). Hay River visitors common reasons for not participating in Aboriginal tourism activities were not having enough time (51%), could not find what they were looking for (33%), and unaware of what was available (33%).
- Visitors who participated in guided outdoor adventure (80%) compared to 31% of those who did not.
- Visitors who participated travelled for culture or history (51%) compared to 28% of those who did not.

Across all 2014 NWT visitors the most common reason cited for not participating in Aboriginal tourism was insufficient time.<sup>27</sup> Figure 3-18 describes the reasons visitors gave for not participating in Aboriginal tourism. Compared to 2013, percentage of visitors not participating due to lack of interest or being unaware of activity decreased. This suggests that visitors are becoming increasingly aware of Aboriginal activities and would be willing to participate given they had the time. Activities or events being unavailable increased in 2014 which may be the result of the NWT forest fires.

<sup>27</sup> Source: 2014 Road Visitor Survey QC35 n=246

**Figure 3-18: Reasons for Not Participating in Aboriginal Tourism Activities 2010-2014**

	2010	2011	2012	2013	2014
I did not have enough time	38%	35%	33%	32%	31%
I was not aware of what was available	35%	26%	32%	29%	26%
The activity/event was not available	33%	32%	21%	16%	27%
I was not interested	8%	10%	10%	15%	14%
I could not find what I was looking for	2%	5%	9%	4%	13%
The activity/event was difficult to access	2%	3%	1%	3%	2%

Source: Road Visitor Survey, QC35 n=296

Note: Only percentages greater than one (1%) are reported in the above figure. In 2013, visitors only selected one response. Visitors selected multiple responses in 2014.

### 3.1.7 Travel Expenditures

On average, visitors spent \$1,025 per person, per trip in 2014. This is an increase of \$363 compared to the 2013 average. Average expenditures per person per trip between 2010 and 2014 are outlined in Figure 3-18 and average expenditures per person per night between 2013 and 2014 are outlined in Figure 3-19.

Expenditures in 2014 increased substantially compared to the previous four years. The high expenditures can be attributed to the significant increase in cost of travelling to the NWT. Over one-third (38%) of total average expenditures per person was attributed to the cost of travelling to the NWT. The substantial deviation of cost of travel to the NWT from the previous four years indicates there may be issues with the data. Possible explanations for this large increase could be due to input error by respondents or respondents incorporating the cost of their entire trip into travel costs. It is recommended that following iterations of the survey make it clear that the cost of travel only implies cost associated with reaching the NWT by road travel only.

Visitor expenses on tours decreased substantially as guided activities were less popular in 2014 than unguided activities. Moreover, fuel expenses decreased by more than 6% from 2013 as the number of travellers using RVs decreased in 2014 while motorcycle and bus travel increased.

**Figure 3-19: Travel Expenditures Per Person, Per Trip**

<b>Mean Expenditures (per person, per trip)</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
Pre-paid packages	\$138	\$379	\$109	\$115	\$130
Hotels and motels	\$81	\$44	\$74	\$65	\$89
Apartment or house rental	\$4	\$1	\$2	\$3	\$0.04
Bed and Breakfasts	\$7	\$17	\$10	\$13	n/a
Camping	\$27	\$24	\$43	\$36	\$38
Festivals and events	\$4	\$5	\$6	\$2	\$3
Activities and entertainment	\$10	\$7	\$10	\$4	n/a
Arts and Crafts	\$56	\$50	\$51	\$38	\$37
Souvenirs	\$36	\$28	\$32	\$32	\$43
Tours	\$26	\$30	\$49	\$72	\$10
Taxis and shuttles	\$0.60	\$0.53	\$0.58	\$2.70	\$0.14
Buying groceries	\$40	\$39	\$48	\$32	\$46
Alcohol	\$10	\$12	\$11	\$5	\$12
Fuel	\$85	\$92	\$132	\$108	\$101
Dining	\$60	\$59	\$63	\$42	\$84
Boat and vehicle rental	\$3	\$4	\$4	\$18	\$3
Travel to NWT	\$16	\$12	\$14	\$12	\$388
Airfare within NWT	\$52	\$60	\$40	\$27	\$27
Taxidermy	n/a	n/a	n/a	n/a	\$0.47
Other Expenditures	\$16	\$22	\$19	\$35	\$13
<b>TOTAL</b>	<b>\$672</b>	<b>\$886</b>	<b>\$718</b>	<b>\$662</b>	<b>\$1,025</b>

Source: Road Visitor Survey QC2-19 n=441, 2013 QC1-19=603, 2012 Kisquared. Trip Diary Phone Survey Final Report

As shown in Figure 3-20, per person per night average expenditures dropped slightly in 2014. Expenditures in most categories decreased in 2014 with the exception of travel to NWT, alcohol, and dining.

**Figure 3-20: Travel Expenditures Per Person, Per Night**

<b>Mean Expenditures</b> (per person, per night)	<b>2013</b>	<b>2014</b>
Pre-paid packages	\$58	\$39
Hotels and motels	\$33	\$24
Apartment or house rental	\$2	\$0.02
Bed and Breakfasts	\$5	n/a
Camping	\$11	\$7
Festivals and events	\$1	\$0.40
Activities and entertainment	\$2	n/a
Arts and Crafts	\$15	\$8
Souvenirs	\$13	\$10
Tours	\$46	\$3
Taxis and shuttles	\$1	\$0.20
Buying groceries	\$11	\$9
Alcohol	\$2	\$3
Fuel	\$44	\$21
Dining	\$18	\$20
Boat and vehicle rental	\$9	\$1
Travel to NWT	\$3	\$96
Airfare within NWT	\$13	\$5
Taxidermy	n/a	\$0.07
Other Expenditures	\$8	\$3
<b>TOTAL</b>	<b>\$295</b>	<b>\$250</b>

Source: Road Visitor Survey QC2-19 n=440, 2013 QC1-19=603.

### 3.2 2014 Road Visitor User Segments

Based on trip characteristics and activities that are important to travellers, visitors were clustered into segments, using the statistical methodology described in Section 2.7.1. Each segment is described and discussed below.

The six segments were:

- Social Sightseers: *Enjoy meeting new people and easy travel experiences;*
- Roaming Retirees: *Seek quiet and safe Northern adventure at low-cost;*
- Comfort Seekers: *Search for the comfortable vacation experience;*
- Outdoor Adventurers: *Enjoy physical adventure and unguided tours;*
- Vocation Voyagers: *Desire a relaxing break from work, without a guide; and*
- Cultural Connoisseurs: *Participate in Aboriginal and cultural activities.*

The visitor groups of 2014 closely resemble those of 2013 with some minor differences. The 2013 segment Wilderness Wanderers was replaced with Vocation Voyagers in 2014. Wilderness Wanderers differ from Vocation Voyagers in their preference for nature experiences, however both prefer unguided activities. The segmentation analysis overall suggests the interests and needs of visitors travelling to NWT were consistent from 2013 to 2014. The 2014 visitor segments have been named to match their characteristics and interests. Similarities and differences between 2014 and 2013 visitor segments are discussed further in Section 3.4. The distribution of the 2014 segments is outlined in Figure 3-21.

**Figure 3-21: 2014 Distribution of Visitor Segments**

	Per Cent of Visitors
Social Sightseers	24%
Roaming Retirees	19%
Comfort Seekers	18%
Outdoor Adventurers	16%
Vocation Voyagers	14%
Cultural Connoisseurs	9%

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h n=350

Note that visitors who could not be easily categorized into one of these segments were not included in this distribution. These 95 uncategorized visitors are not sufficiently distinct from the average visitor to allow for separate profiling.

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

### 3.2.1 Segment 1: Outdoor Adventurers

#### Who They Are

Outdoor adventures comprised 16% of the visitors to the NWT in 2014. The majority (81%) have completed post-secondary education (either college or technical diploma or a university degree).<sup>28</sup> Compared to 2013 the 2014 segment did not prefer guided tours. The difference in the results may be due to the fact that in 2014 retirees comprised only 29% of outdoor adventurers as opposed to 44% in 2013. Outdoor Adventurers spent 5.1 nights in the NWT, on average.<sup>29</sup> Outdoor Adventurers made a firm decision to travel 6.2 months in advance.<sup>30</sup> Typically, Outdoor Adventurers travelled in groups of three.<sup>31</sup>

**Figure 3-22: Outdoor Adventurer Demographics**

Characteristic	Categories	Percentage
<b>Gender</b>	Male	43%
	Female	57%
<b>Country of Origin</b>	Canada	96%
	USA	3%
	International	1%
<b>Education</b>	Less than high school	1%
	High school	9%
	Some technical college/university	10%
	College/technical diploma or certificate	23%
	University degree (undergraduate)	49%
	University degree (graduate)	9%
<b>Household Income</b>	Under \$30,000	13%
	\$30,000 to \$49,999	18%
	\$50,000 to \$69,999	29%
	\$70,000 to \$89,999	13%
	\$90,000 to \$119,999	13%
	Over \$120,000	15%

Source: 2014 Road Visitor Survey, QD2, QD4, QD7. n = 57.

<sup>28</sup> Source: 2014 Road Visitor Survey QD2 n=65.

<sup>29</sup> Source: 2014 Road Visitor Survey QA1 n=65.

<sup>30</sup> Source: 2014 Road Visitor Survey C20 and C21 n=65.

<sup>31</sup> Source: 2014 Road Visitor Survey QA7i n=65.



### **Inspirations for Travel**

Outdoor Adventurers most commonly stated wilderness, isolation, landscape or wildlife and always wanting to visit were their primary reason for choosing to visit the NWT. The following figure outlines the important and unimportant trip characteristics for Outdoor Adventurers.

**Figure 3-23: Outdoor Adventurer Interests**

<b>Most Important</b>	<b>Least Important</b>
Outstanding scenery	Luxury accommodations
Viewing wildlife	Package tours to a destination
Parks and wilderness areas	Exciting nightlife and entertainment
Sightseeing	Number of airline layovers
Camping	Opportunities to take organized tours
Physical adventure	Interest in shopping
Personal safety	Experiencing nature with a guide
Photography	Warm, sunny climate

Source: 2014 Road Visitor Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C27 n=57

Outdoor Adventurers are best described by the “nature experiences” and “physical challenges” factors. This illustrates the importance of being in nature without a guide and physical adventure or challenges. Warm, sunny climate tends not to be important to these visitors. See Section 3.3 for details on the factor analysis results.

### **Trip Satisfaction and Likelihood to Return to the NWT**

One quarter (25%) of Outdoor Adventurers were return visitors to the NWT, and 76% of this group intended to visit again.<sup>32</sup> On a scale of one to five, where five is very satisfied, the average rating by Outdoor Adventurers was 4.73.<sup>33</sup>

<sup>32</sup> Source: 2014 Road Visitor Survey QA10 n=65.

<sup>33</sup> Source: 2014 Road Visitor Survey QA9 n=64.

### **Travel Spending Patterns**

Average total costs of Outdoor Adventurers were slightly higher than the average total costs for all visitors in 2014 at \$1,088. Outdoor Adventurers spent the most on groceries, festivals, and fuel. They spent above average amounts on vehicle rentals, camping, arts and crafts, travel to NWT and souvenirs. Outdoor Adventurers spent the least on average on airfare within the NWT, and guided tours.

**Figure 3-24: Outdoor Adventurer Spending Patterns**

	Average Expenditures (per person, per night)	Average Expenditures (per person, per trip)
Pre-paid vacation package	\$11	\$97
Hotels and motels	\$20	\$81
Apartment or house rental	\$0	\$0
Camping	\$8	\$48
Festivals and events	\$1	\$4
Arts and Crafts	\$7	\$41
Souvenirs	\$18	\$52
Tours	\$2	\$6
Taxis and shuttles	\$0.03	\$0.11
Groceries	\$14	\$65
Alcohol	\$3	\$13
Fuel	\$29	\$150
Dining	\$19	\$81
Boat and vehicle rental	\$1	\$7
Travel to NWT	\$128	\$415
Airfare within NWT	\$4	\$14
Taxidermy	\$0	\$0
Other expenses	\$2	\$14
<b>Average total</b>	<b>\$267</b>	<b>\$1,088</b>

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, C1-18 n=57

### 3.2.2 Segment 2: Social Sightseers

#### Who They Are

Social Sightseers comprised almost one-quarter (24%) of the visitors to the NWT in 2014. They tended to be well-educated, with 69% having a post secondary credential.<sup>34</sup> They were seeking comfort, but luxury accommodations are not important to them when selecting a vacation destination. Social Sightseers were mostly interested in participating in safe activities that were not guided. Social Sightseers tended to travel in groups of 3.2 and spent an average of 5.9 nights in NWT. They also made a firm decision to travel to the NWT 4.2 months before travelling.<sup>35</sup>

**Figure 3-25: Social Sightseers Demographics**

Characteristic	Categories	Percentage
<b>Gender</b>	Male	33%
	Female	67%
<b>Country of Origin</b>	Canada	98%
	USA	1%
	International	1%
<b>Education</b>	Less than high school	3%
	High school	24%
	Some technical college/university	4%
	College/technical diploma or certificate	22%
	University degree (undergraduate)	37%
	University degree (graduate)	10%
<b>Household Income</b>	Under \$30,000	4%
	\$30,000 to \$49,999	23%
	\$50,000 to \$69,999	25%
	\$70,000 to \$89,999	17%
	\$90,000 to \$119,999	12%
	Over \$120,000	20%

Source: 2014 Road Visitor Survey, QD2, QD4, QD7. n = 85.

<sup>34</sup> Source: Road Visitor Survey QD1 and QD3 n=70.

<sup>35</sup> Source: Road Visitor Survey QA7 n=70.

### **Inspirations for Travel**

Social Sightseers selected always wanted to visit, general interest and general touring most often as their primary reasons for travelling to the NWT. As illustrated in Figure 3-26, Social Sightseers tended to be interested in organized vacation experiences such as wildlife viewing. Social Sightseers tended not to be interested in experiencing nature with a guide or exciting nightlife and entertainment activities.

**Figure 3-26: Social Sightseers Profile**

<b>Most Important</b>	<b>Least Important</b>
Outstanding scenery	Luxury accommodations
Unique or different cultural groups	Unguided hunting
Meeting new people	Golfing
Relaxing break from work	Exciting nightlife or entertainment
Having fun being entertained	Guided fishing
Cleanliness and hygiene	Viewing northern lights
Cost to get to destination	Experiencing nature with a guide
Viewing wildlife	

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h n=85

### **Trip Satisfaction and Likelihood to Return to NWT**

Nearly one-third (32%) of Social Sightseers were return travellers to the NWT, and 71% stated they would return to the NWT.<sup>36</sup> Social Sightseers were highly satisfied with their trip, with an average satisfaction rating of 4.89 out of 5.

<sup>36</sup> Source: 2014 Road Visitor Survey QA2 n=70

**Travel Spending Patterns**

Social Sightseers had the highest average expenditures per person and spent more than any other segment on pre-paid vacation packages, dining, souvenirs, apartment rentals, taxidermy, and taxis. This segment spent the least on fuel and less than average on hotels and motels, camping, and other expenditures.

**Figure 3-27: Social Sightseers Travel Expenditures**

	Average Expenditures (per person, per night)	Average Expenditures (per person, per trip)
Pre-paid vacation package	\$92	\$320
Hotels and motels	\$12	\$59
Apartment or house rental	\$0.10	\$0.19
Camping	\$4	\$25
Festivals and events	\$0.42	\$3
Arts and Crafts	\$6	\$37
Souvenirs	\$15	\$56
Tours	\$2	\$10
Taxis and shuttles	\$0.06	\$0.61
Groceries	\$8	\$42
Alcohol	\$3	\$17
Fuel	\$14	\$74
Dining	\$20	\$92
Boat and vehicle rental	\$1	\$4
Travel to NWT	\$59	\$339
Airfare within NWT	\$5	\$31
Taxidermy	\$0.35	\$2
Other expenses	\$3	\$13
<b>Average total</b>	<b>\$245</b>	<b>\$1,125</b>

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, C1-18 n=85

### 3.2.3 Segment 3: Cultural Connoisseurs

#### Who They Are

Cultural Connoisseurs were 9% of 2014 visitors. Cultural Connoisseurs are interested in an educational vacation to learn about culture and history. They tend to have graduate or post-graduate educations and professional or trade jobs. Cultural connoisseurs also have the highest percentage of respondents with annual household incomes over \$120,000 (37%). On average, they travel in groups of 2.9.<sup>37</sup> Cultural Connoisseurs made a firm decision to travel to the NWT on average 4.7 months in advance.

**Figure 3-28: Cultural Connoisseur Demographics**

Characteristic	Categories	Percentage
<b>Gender</b>	Male	45%
	Female	55%
<b>Country of Origin</b>	Canada	93%
	USA	6%
	International	1%
<b>Education</b>	Less than high school	0%
	High school	12%
	Some technical college/university	1%
	College/technical diploma or certificate	30%
	University degree (undergraduate)	25%
	University degree (graduate)	32%
<b>Household Income</b>	Under \$30,000	0%
	\$30,000 to \$49,999	5%
	\$50,000 to \$69,999	24%
	\$70,000 to \$89,999	9%
	\$90,000 to \$119,999	26%
	Over \$120,000	37%

Source: 2014 Road Visitor Survey, QD2, QD4, QD7. n = 30.

#### Inspirations for Travel

Cultural Connoisseurs had a wide variety of interests. They commonly identified always wanting to visit, wilderness, isolation, landscape or wildlife, and general interest as their primary reasons for travelling to the NWT.<sup>38</sup> Cultural Connoisseurs were not interested in activities that involved a large

<sup>37</sup> Source: Road Visitor Survey QA6a n=48

<sup>38</sup> Source: Road Visitor Survey QC20 n=48.

number of people. They preferred activities such as photography, visiting historic sites, hiking, and visiting art galleries. Their interests are further outlined in Figure 3-29.

**Figure 3-29: Cultural Connoisseur Profile**

Most Important	Least Important
Outstanding scenery	Luxury accommodations
Parks and wilderness areas	Exciting nightlife entertainment
Photography	Festivals or sporting events
Historic site visits	Hunting
Sightseeing	Viewing northern lights
Wildlife viewing	Package tours
Hiking	
Art gallery visit	

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h n=30.

#### **Trip Satisfaction and Likelihood to Return to NWT**

In 2014, 14% of Cultural Connoisseurs were return visitors to the NWT.<sup>39</sup> Cultural Connoisseurs rated their satisfaction an average of 4.66 out of 5. In addition, 61% of Cultural Connoisseurs stated that they planned to return to the NWT.<sup>40</sup>

<sup>39</sup> Source: 2014 Road Visitor Survey QA2 n=48

<sup>40</sup> Source: 2014 Road Visitor Survey QA9, QA10 n=48

**Travel Spending Patterns**

In 2014, Cultural Connoisseur had the second lowest average expenditures per person per trip. They did not spend money on apartment rentals, taxis or taxidermy. Instead, Cultural Connoisseurs spent the most on vehicle rentals, alcohol, and arts and crafts. They spent the least on dining, pre-paid vacation packages, and less than average on camping, festivals, travel to the NWT, fuel, and other expenses.

**Figure 3-30: Cultural Connoisseur Spending Patterns**

	Average Expenditures (per person, per night)	Average Expenditures (per person, per trip)
Pre-paid vacation package	\$7	\$15
Hotels and motels	\$37	\$105
Apartment or house rental	\$0	\$0
Camping	\$5	\$32
Festivals and events	\$0.34	\$1
Arts and Crafts	\$10	\$52
Souvenirs	\$9	\$45
Tours	\$7	\$18
Taxis and shuttles	\$0	\$0
Groceries	\$9	\$46
Alcohol	\$9	\$35
Fuel	\$25	\$79
Dining	\$20	\$73
Boat and vehicle rental	\$2	\$11
Travel to NWT	\$90	\$325
Airfare within NWT	\$7	\$33
Taxidermy	\$0	\$0
Other expenses	\$1	\$9
<b>Average total</b>	<b>\$238</b>	<b>\$879</b>

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, C1-18 n=30.



### 3.2.4 Segment 4: Roaming Retirees

#### Who They Are

Roaming Retirees represented 19% of the visitors to the NWT in 2014.<sup>41</sup> They were often retired; thus, cost is an important factor for the activities in which they participated. Roaming Retirees tended to travel as a couple (65%), with family (26%) or with friends (15%), very few (1%) travelled alone.<sup>42</sup> On average, they begin planning their trip 10.7 months in advance, and decided to travel to the NWT 5.2 months in advance.<sup>43</sup>

**Figure 3-31: Roaming Retiree Demographics**

Characteristic	Categories	Percentage
<b>Gender</b>	Male	34%
	Female	66%
<b>Country of Origin</b>	Canada	97%
	USA	2%
	International	1%
<b>Education</b>	Less than high school	17%
	High school	9%
	Some technical college/university	9%
	College/technical diploma or certificate	20%
	University degree (undergraduate)	32%
	University degree (graduate)	13%
<b>Household Income</b>	Under \$30,000	5%
	\$30,000 to \$49,999	22%
	\$50,000 to \$69,999	26%
	\$70,000 to \$89,999	25%
	\$90,000 to \$119,999	13%
	Over \$120,000	10%

Source: 2014 Road Visitor Survey, QD2, QD4, QD7. n = 68.

<sup>41</sup> Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h n=73.

<sup>42</sup> Source: 2014 Road Visitor Survey QA6a n=73.

<sup>43</sup> Source: 2014 Road Visitor Survey QC20 n=73 and Qc21 n=73.

### **Inspirations for Travel**

As illustrated in Figure 3-32, Roaming Retirees tended to prefer cultural activities and unguided activities. They preferred quiet activities such as sightseeing and photography, and are not interested in social activities such as nightlife or festivals, or physical activities such as biking or canoeing.

**Figure 3-32: Roaming Retiree Profile**

Most Important	Least Important
Wildlife viewing	Exciting nightlife and entertainment
Sightseeing	Experiencing nature with a guide
Learning opportunities	Luxury accommodations
Personal safety	Physical adventure
Photography	Festivals or events
Camping	Biking
Historic site visits	Canoeing
Museum visits	Personal challenges

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h n=68

Roaming Retirees are best described by their lack of interest in “physical challenges” and interest in “nature experiences” and “fair weather” factors. This illustrates that they are looking to be outdoors and prefer good weather and are interested in a comfortable vacation. See Section 3.3 for additional findings from the factor analysis.

### **Trip Satisfaction and Likelihood to Return to the NWT**

In 2014, 39% of Roaming Retirees were return visitors to the NWT.<sup>44</sup> Roaming Retirees were highly satisfied with their visit to the NWT, rating their satisfaction an average of 4.73 out of 5. Two-thirds (66%) of Roaming Retirees plan to return to the NWT.<sup>45</sup>

<sup>44</sup> Source: 2014 Road Visitor Survey QA2 n=73.

<sup>45</sup> Source: 2014 Road Visitor Survey QA10 n=67.

### **Travel Spending Patterns**

Roaming Retirees had the third lowest total average expenditures. Roaming Retirees spent more than average on pre-paid vacation packages, camping, other expenditures, festivals, and fuel. Roaming retirees did not spend money on taxidermy, apartment rentals or taxis and the least on vehicle rentals, alcohol, and arts and crafts. They spent less than average on airfare within the NWT, groceries, hotels, travel to the NWT, and souvenirs.

**Figure 3-33: Roaming Retiree Spending Patterns**

	<b>Average Expenditures (per person, per night)</b>	<b>Average Expenditures (per person, per trip)</b>
Pre-paid vacation package	\$28	\$131
Hotels and motels	\$17	\$53
Apartment or house rental	\$0	\$0
Camping	\$9	\$44
Festivals and events	\$1	\$3
Arts and Crafts	\$4	\$21
Souvenirs	\$8	\$37
Tours	\$1	\$7
Taxis and shuttles	\$0	\$0
Groceries	\$9	\$45
Alcohol	\$1	\$7
Fuel	\$27	\$137
Dining	\$20	\$79
Boat and vehicle rental	\$1	\$1
Travel to NWT	\$97	\$347
Airfare within NWT	\$4	\$16
Taxidermy	\$0	\$0
Other expenses	\$3	\$15
<b>Average total</b>	<b>\$230</b>	<b>\$943</b>

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, C1-18 n = 68.

### 3.2.5 Segment 5: Comfort Seekers

#### Who They Are

Comfort Seekers accounted for 18% of visitors to the NWT in 2014. They tended to be well-educated and were often retired or employed as a professional.<sup>46</sup> They were seeking comfort, but not luxury, and were mostly interested in participating in safe activities that were not guided. Comfort Seekers tended to travel in groups of 2.9 people and spend 5.4 nights in the NWT on average.<sup>47</sup>

Figure 3-34: Comfort Seekers Demographics

Characteristic	Categories	Percentage
<b>Gender</b>	Male	40%
	Female	60%
<b>Country of Origin</b>	Canada	98%
	USA	2%
	International	1%
<b>Education</b>	Less than high school	4%
	High school	9%
	Some technical college/university	12%
	College/technical diploma or certificate	51%
	University degree (undergraduate)	19%
	University degree (graduate)	5%
<b>Household Income</b>	Under \$30,000	6%
	\$30,000 to \$49,999	15%
	\$50,000 to \$69,999	25%
	\$70,000 to \$89,999	20%
	\$90,000 to \$119,999	19%
	Over \$120,000	15%

Source: 2014 Road Visitor Survey, QD2, QD4, QD7. n = 62.

#### Inspirations for Travel

Comfort Seekers most commonly selected always wanted to visit and general interest as their primary reasons for travel. Furthermore, they had among the highest rate of visitors who travel for the purpose of visiting friends or family (28%) compared to any other segment. Comfort Seekers were not concerned with warm, sunny climate and the cost of travel was not important to them. Comfort Seekers had the lowest participation rate in Aboriginal tourism than any other segment

<sup>46</sup> Source: 2014 Road Visitor Survey QD1 and QD3 n=45.

<sup>47</sup> Source: 2014 Road Visitor Survey QA7 n=45.

(6%).<sup>48</sup> Comfort Seekers preferred relaxing activities such as historic site visits and sightseeing, as opposed to personal challenges for their trip (Figure 3-35).

**Figure 3-35: Comfort Seekers Profile**

Most Important	Least Important
Sightseeing	Golfing
Photography	Experiencing nature with a guide
Outstanding scenery	Unique or different cultural groups
Relaxing break from work	Personal challenges
Buffalo viewing	Number of airline transfers
Cleanliness	Package tours to a destination
Historic site visit	Luxury accommodations
Museum visits	Exciting nightlife and entertainment

Source: 2014 Road Visitor Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n=62.

Comfort Seekers are best described by their lack of interest in the “physical challenges” and “nature experiences” factors. See Section 3.3 for more details on the factor analysis.

#### **Trip Satisfaction and Likelihood to Return to the NWT**

More than one-third (37%) of Comfort Seekers were return travellers to the NWT and 45% stated they would return to the NWT which was the lowest of any group.<sup>49</sup> Comfort Seekers were highly satisfied with their trip, with an average satisfaction rating of 4.41 out of 5.

<sup>48</sup> Source: 2014 Road Visitor Survey QC31 n=107.

<sup>49</sup> Source: 2014 Road Visitor Survey QA2 n=106

### **Spending Patterns**

Comfort Seekers' spending patterns were the lowest of any of the visitor segments, with visitors from this segment spending an average of \$827 per person per trip. Comfort Seekers spent the least on travelling to the NWT, groceries, and camping. They spent most on hotels, and other expenditures and more than average on airfare within the NWT, and dining.

**Figure 3-36: Comfort Seekers Spending Patterns**

	<b>Average Expenditures (per person, per trip)</b>	<b>Average Expenditures (per person, per night)</b>
Pre-paid vacation package	\$8	\$33
Hotels and motels	\$40	\$151
Apartment or house rental	\$0	\$0
Camping	\$5	\$25
Festivals and events	\$0.07	\$1
Arts and Crafts	\$6	\$29
Souvenirs	\$7	\$39
Tours	\$3	\$9
Taxis and shuttles	\$0	\$0
Groceries	\$6	\$36
Alcohol	\$2	\$10
Fuel	\$15	\$85
Dining	\$20	\$83
Boat and vehicle rental	\$0.50	\$4
Travel to NWT	\$66	\$266
Airfare within NWT	\$7	\$35
Taxidermy	\$0	\$0
Other expenses	\$4	\$21
<b>Average Total</b>	<b>\$190</b>	<b>\$827</b>

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, C1-18 n = 62.

### 3.2.6 Segment 6: Vocation Voyagers

#### Who They Are

Vocation Voyagers accounted for 14% of visitors to the NWT in 2014. Common professions for Vocation Voyagers were retired, educator, management and self-employed.<sup>50</sup> Vocation Voyagers had high annual household incomes with 21% making over \$120,000 per year. In 2014, most Vocation Voyagers (93%) originated from Canada; however, larger shares of Vocation Voyagers come from the U.S. (5%) or international locations (2%) compared to the average.<sup>51</sup> The average group size for Vocation Voyagers was 2.4.<sup>52</sup>

Vocation Voyagers' average stay in the NWT was 5.9 nights. They begin planning their trip an average of 9.5 months ahead and made a firm decision to travel to the NWT 8.2 months in advance, approximately 3 months longer than the average of all other visitors.<sup>53</sup> This suggests that Vocation Voyagers are less spontaneous and make a firm decision to travel well before other visitor segments.<sup>54</sup>

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<sup>51</sup> Source: 2014 Road Visitor Survey Region n=60.

<sup>52</sup> Source: 2014 Road Visitor Survey QA6a n=60.

<sup>53</sup> Source: 2014 Road Visitor Survey QC21 n=60.

<sup>54</sup> Source: 2014 Road Visitor Survey QC20 and C21 n=60.

**Figure 3-37: Vocation Voyagers Demographics**

Characteristic	Categories	Percentage
<b>Gender</b>	Male	37%
	Female	63%
<b>Country of Origin</b>	Canada	93%
	USA	5%
	International	2%
<b>Education</b>	Less than high school	0%
	High school	6%
	Some technical college/university	6%
	College/technical diploma or certificate	29%
	University degree (undergraduate)	32%
	University degree (graduate)	27%
<b>Household Income</b>	Under \$30,000	2%
	\$30,000 to \$49,999	11%
	\$50,000 to \$69,999	28%
	\$70,000 to \$89,999	24%
	\$90,000 to \$119,999	14%
	Over \$120,000	21%

Source: 2014 Road Visitor Survey, QD2, QD4, QD7. n = 48.



### **Inspirations for Travel**

Vocation Voyagers indicated that always wanting to visit and general interest were the most common primary reasons for travelling to the NWT.<sup>55</sup> They prefer unguided tours, viewing wildlife, and historic site visits among other quiet activities. Vocation Voyagers were not interested in shopping, experiencing nature with a guide or guided tours. Figure 3-38 illustrates the activities Vocation Voyagers were and were not interested in.

**Figure 3-38: Vacation Wanderer Profile**

<b>Most Interested</b>	<b>Least Interested</b>
Parks and wilderness areas	Exciting nightlife and entertainment
Viewing wildlife	Luxury accommodations
Museum visits	Experiencing nature with a guide
Camping	Guided tours
Unguided vehicle town tour	Golfing
Hiking	Shopping
Photography	Guided Fishing
Historic site visits	

Source: 2014 Road Visitor Survey, QC24 a-h, C25a-o, C28a-o, C32a-h n = 48.

In 2014, 33% of Vocation Voyagers participated in Aboriginal tourism, suggesting a relatively limited interest in Aboriginal tourism for this visitor segment.<sup>56</sup>

### **Trip Satisfaction and Likelihood to Return to the NWT**

Vocation Voyagers were very satisfied with their trip. Their average rating of trip satisfaction was 4.53 out of 5.<sup>57</sup> In 2014, 32% of Vocation Voyagers were return visitors to the NWT and 46% of Vocation Voyagers plan to return.<sup>58</sup>

<sup>55</sup> Source: 2014 Road Visitor Survey QA7 n=60.

<sup>56</sup> Source: 2014 Road Visitor Survey QC34a n=59

<sup>57</sup> Source: 2014 Road Visitor Survey QA9 n=59

<sup>58</sup> Source: 2014 Road Visitor Survey QA10 n=60

**Spending Patterns**

Vocation Voyagers had higher than average total per person, per trip expenditures at \$1,121. None of the Vocation Voyagers in 2014 spent money on renting an apartment or house or spent money on taxis or taxidermy. Vocation Voyagers spent more than average on airfare within the NWT, camping, tours, and travel to the NWT. Vocation Voyagers spent the least on hotels and motels, festivals, souvenirs, and other expenses.

**Figure 3-39: Vacation Wanderer Spending Patterns**

	Average Expenditures (per person, per night)	Average Expenditures (per person, per trip)
Pre-paid vacation package	\$67	\$69
Hotels and motels	\$20	\$44
Apartment or house rental	\$0	\$0
Camping	\$9	\$56
Festivals and events	\$0.23	\$0.46
Arts and Crafts	\$7	\$23
Souvenirs	\$7	\$34
Tours	\$8	\$25
Taxis and shuttles	\$0	\$0
Groceries	\$10	\$50
Alcohol	\$2	\$8
Fuel	\$27	\$103
Dining	\$20	\$83
Boat and vehicle rental	\$0.20	\$2
Travel to NWT	\$170	\$565
Airfare within NWT	\$5	\$51
Taxidermy	\$0	\$0
Other expenses	\$2	\$8
<b>Average total</b>	<b>\$354</b>	<b>\$1,121</b>

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, C1-18 n = 48.

**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:

- Organized experiences;
- Nature experiences;
- Fair weather;
- Physical challenges; and
- Shopping and entertainment.

### 3.3.1 Organized Experiences

Individuals who were seeking organized experiences value opportunities to explore and experience the NWT through comfortable, organized activities and tours. Two variables load positively on this factor, they include “opportunities to take organized tours” (.372) and “package tours to a destination” (.362).

Comparative analyses (cross-tabulations and comparisons of averages) suggest that organized experiences are most important to visitors who travelled to the NWT for aurora viewing, wilderness, and natural phenomenon.

Cross-tabulations show that organized experiences best describe Comfort Seekers. Social Sightseers value organized experiences the least. Factor scores in Figure 3-40 determine the extent to which each visitor segment values organized experiences. A positive factor score, such as that for Comfort Seekers, and Vocation Voyagers determines that they are interested in organized experiences. Negative factor scores illustrate the lack of importance of organized experiences to Social Sightseers and Cultural Connoisseurs.

**Figure 3-40: Organized Experiences Factor Score**

	Interested	Not Interested
Comfort Seekers	0.611	
Vocation Voyagers	0.367	
Outdoor Adventurers	0.155	
Roaming Retirees	0.104	
Cultural Connoisseurs		-0.563
Social Sightseers		-0.653

Source: 2014 Road Visitor Survey, n=348

### 3.3.2 Nature Experiences

The second factor, "nature experiences", describes an interest in experiencing nature. Factor two was characterized by high positive loadings from “physical adventure” (.627), "parks and wilderness areas" (.573), "viewing wildlife" (.502), "learning opportunities" (.405), and "outstanding scenery" (.457). “Unique or different cultural groups” also loaded positively (.316) on this factor.

Comparative analyses suggest that this factor was important for travellers interested in guided fishing, unguided outdoor adventure, wilderness, isolation, landscape or wildlife or natural phenomenon. Nature experiences were also more important to younger travellers, aged 20 to 34, with higher levels of education and those who participated in Aboriginal tourism activities.

Nature experiences were less important to visitors who were travelling to visit friends or relatives. Interestingly, nature experiences were also less important to those who are interested in visiting the NWT for aurora viewing. This suggests that some individuals who were seeking wilderness experiences wished to do so without seeing the northern lights.

As illustrated in Figure 3-41, the nature experiences factor best described Outdoor Adventurers and Roaming Retirees while Comfort Seekers were least interested in nature experiences.

**Figure 3-41: Nature Experiences Factor Score**

	Interested	Not Interested
Outdoor Adventurers	0.539	
Roaming Retirees	0.109	
Social Sightseers	0.194	
Cultural Connoisseurs		-0.147
Comfort Seekers		-0.718
Vocation Voyagers		-0.106

Source: 2014 Road Visitor Survey, n=348

### 3.3.3 Fair Weather

“Fair weather” represented a warm, sunny climate and reliable weather when travelling. The two variables which loaded positively on this factor were "reliable weather" (.364), and "warm, sunny climate" (.309).

Fair weather was most important to visitors who were travelling for guided fishing, aurora viewing, or who were visiting friends and family. Canadian travellers and those who have visited the NWT before were also more likely to see travel ease as important. This factor was less important to visitors from the U.S. or other international locations, and is also less important to men than women.

Travel ease was most important to Social Sightseers which is evident by their high average spending on pre-paid vacation packages. Vocation Voyagers value easy travel the least.

**Figure 3-42: Fair Weather Factor Score**

	Interested	Not Interested
Social Sightseers	0.857	
Roaming Retirees	0.106	
Comfort Seekers	0.013	
Outdoor Adventurers		-0.068
Cultural Connoisseurs		-0.547
Vocation Voyagers		-1.220

Source: 2014 Road Visitor Survey, n=348

### 3.3.4 Physical Challenges

The "physical challenges" factor, is related to outdoor physical adventure and personal challenges. Travellers who find this factor important are interested in activities that challenge them physically and personally. The two variables that load most highly on this factor were: "physical adventure" (.465), "personal challenges" (.382), "cost to get to destination (.358), and "cost of accommodation and meals" (.347).

Comparative analyses show that physical challenges are most important to male travellers, students, travellers who work in retail sales or self employed. Physical challenges are less important to those who are 55 and older, retired or unemployed.

Similarly to the findings from the segmentation analysis, cross-tabulations found that Outdoor Adventurers are best described by physical challenges. Roaming Retirees and Comfort Seekers were least interested in physical challenges.

**Figure 3-43: Physical Challenges Factor Score**

	Interested	Not Interested
Outdoor Adventurers	0.898	
Cultural Connoisseurs	0.591	
Social Sightseers	0.500	
Roaming Retirees		-0.677
Comfort Seekers		-0.644
Vocation Voyagers		-0.511

Source: 2014 Road Visitor Survey, n=348

### 3.3.5 Shopping and Entertainment

The “Shopping and entertainment” factor indicated travellers who were interested in purchasing goods while travelling. Positive factors were “interest in shopping” (.366) and “exciting nightlife and entertainment” (.332).

Souvenir shopping was most important to visitors who were travelling for unguided outdoor adventure, and hunting. Visitors who worked in retail and International travellers were more likely to see souvenir shopping as important. This factor was less important to visitors from the U.S. and was also less important to men than women.

Souvenir shopping was most important to Social Sightseers given their high average per person spending on souvenirs and arts and crafts. Vocation Voyagers valued souvenir shopping the least.

**Figure 3-44: Shopping and Entertainment Factor Score**

	Interested	Not Interested
Vocation Voyagers	1.283	
Comfort Seekers	0.080	
Cultural Connoisseurs	0.439	
Outdoor Adventurer		-0.321
Social Sightseers		-0.586
Roaming Retirees		-0.196

Source: 2014 Road Visitor Survey, n=348

### 3.4 New and Emerging Segments

#### 3.4.1 Business Travellers

In 2014, 2% of Road Visitors were travelling for business purposes.<sup>59</sup> Of those visitors, 55% added extra days onto their business trip to tour the NWT.<sup>60</sup> Business travellers' primary destinations were Inuvik and Yellowknife.<sup>61</sup> They travelled alone or in groups of five to ten and spent 3.8 nights in the NWT, on average.<sup>62</sup> Business travellers reported participating in the following activities:

- Sightseeing
- Wildlife viewing: including buffalo viewing, and bird watching;
- Museums or arts activities: including visiting an art gallery, museum, or art, music, or film festival;
- Hiking and guided tours;
- Shopping; and
- Eating Aboriginal cuisine.

Business travellers tended to participate in activities that could be done independently or in groups, such as guided tours, boating, or camping.<sup>63</sup>

<sup>59</sup> Source: 2014 Road Visitor Survey QA7 n=445

<sup>60</sup> Source: 2014 Road Visitor Survey QB1 n=5.

<sup>61</sup> Source: 2014 Road Visitor Survey QA3 n=5.

<sup>62</sup> Source: 2014 Road Visitor Survey QA7i and A1 n=5.

<sup>63</sup> Source: 2014 Road Visitor Survey QA7i and C24 n=5

### 3.4.2 Changes to Existing Segments<sup>64</sup>

The visitor segments identified in 2014 differ only slightly from those identified in 2013.

#### Comfort Seekers

Comfort Seekers were similar in the activities they were not interested in, however fewer travelled internationally and they planned their trip further in advance.

**Figure 3-45: Comparison of Comfort Seekers**

	2013			2014		
	Canada	USA	Int.	Canada	USA	Int.
Country of Origin	64%	15%	21%	98%	2%	1%
Trip Planning (start thinking about trip; firm decision)	8.7 months, 4.2 months			7.8 months, 4.8 months		
Activities not interested in	Outdoor adventure Luxury accommodations Exciting nightlife			Guided vehicle town tour Unguided hunting Guided walking tour		
Activities interested in	Guided tours Learning opportunities Wildlife Viewing Comfortable/convenient travel Low budget travel			Photography Museum Visit Sightseeing Wildlife viewing Buffalo viewing Historic site visit		

Source: 2014 Road Visitor Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=62 and 2012 Trip Diary User Segmentation Study.

<sup>64</sup> Weighting for 2014 Road Visitor Survey Report was different than in the 2013 Trip Diary Survey Report

Cultural Connoisseurs

Cultural Connoisseurs from 2014 were similar to those in 2015 in level of education, annual income, travel partners (family), and interest in arts and culture. However, fewer Cultural Connoisseurs participated in Aboriginal Tourism in 2014 than 2013. They also differed in trip motivators and country of origin (see Figure 3-46).

**Figure 3-46: Comparison of Cultural Connoisseurs**

	2013			2014		
	Canada	USA	Int.	Canada	USA	Int.
Country of Origin	70%	5%	25%	93%	6%	1%
Trip planning (start thinking about trip, firm decision)	9.4 months, 6.8 months			7.6 months, 4.7 months		
Trip Motivators	General interest Unguided adventure Culture and history			Always wanted to visit Wilderness, isolation, landscape or wildlife General interest		

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, C1-18 n=48

Vocation Voyagers

In 2014, Vocation Voyagers made a firm decision 8.2 months in advance on average (see Figure 3-47) which was further ahead than all other visitor segments. This illustrates that Vocation Voyagers were less spontaneous in 2014. Vocation Voyagers also differed in trip motivators and intent to return. In 2014, a lower portion of Vocation Voyagers reported that they planned on returning to the NWT. Vocation Voyagers rated the importance of experiencing nature with a guide and opportunities to take a guided tour 1.5 out of 5 on average, these ratings were similar to 2013.

**Figure 3-47: Comparison of Wilderness Wanderers and Vocation Voyagers**

	2013			2014		
	Canada	USA	Int.	Canada	USA	Int.
Country of Origin	70%	11%	19%	93%	5%	2%
Trip planning habits (start thinking about trip, firm decision)	6.6 months, 5.1 months			9.5 months, 8.2 months		
Trip Motivators	General Interest General Touring			Always wanted to visit General Interest Wilderness, isolation, landscape or wildlife		
Percent of return visitors	30%			32%		
Percent planning to return	52%			46%		

Source: 2014 Road Visitor Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n= 48 and 2013 Trip Diary Survey.



### Social Sightseers

Social Sightseers in 2014 and 2013 had small proportions of American visitors. In 2014, Social Sightseers preferred to participate in viewing wildlife and meeting new people. They also travelled in smaller groups and were more budget-conscious than Sociable Sightseers in 2013.

**Figure 3-48: Comparison of Social Sightseers**

	2013			2014		
	Canada	USA	Int.	Canada	USA	Int.
Country of Origin	93%	2%	5%	98%	1%	1%
Trip planning habits (start thinking about trip, firm decision)	9.2 months, 3.6 months			8.4 months, 4.3 months		
Trip Motivators	Visiting family or friends General touring			Always wanted to visit General interest		
Average Group size	4.08			3.2		
Activities interested in	Package tours Exciting nightlife Luxury accommodations Organized tours			Viewing wildlife Unique or different cultural groups Meeting new people		
Activities not interested in	General touring Camping			Hunting Viewing northern lights		

Source: 2014 Road Visitor Survey, QC24 a-h, C25a-o, C28a-o, C32a-h, C1-18 n=85 and 2013 Trip Diary Survey.

Visitor segments changed slightly in 2014 from 2013, however, it should be noted that the weighting procedure was different in 2014 compared to 2013 therefore any conclusions drawn from the 2014 and 2013 comparisons should be cautioned. In 2014, Social Sightseers accounted for the largest visitor segment and Comfort Seekers were the lowest. In 2013, Outdoor Adventurers were the largest and Vocation Voyagers the smallest visitor segments. Cultural Connoisseurs stayed roughly the same, while Outdoor Adventurers and Comfort Seekers dropped 15% from 2013 to 2014. The largest increases in share of visitors from 2013 to 2014 were for Social Sightseers and Vocation Voyagers, both increasing by 11%.

**Figure 3-49: Visitor Segment Distribution**

Segment	Per Cent of Visitors	Per Cent of Visitors	% Change
	2013	2014	
Roaming Retirees	14%	19%	+5%
Social Sightseers	9%	24%	+15%
Outdoor Adventurers	33%	16%	-17%
Vocation Voyagers	6%	14%	+8%
Cultural Connoisseurs	15%	9%	-6%
Comfort Seekers	23%	18%	-5%

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h n=350

### 3.5 Dempster Highway Traveller Characteristics

In 2014, 18% of respondents received their Trip Diary or Passport at the Dempster Highway, Dempster Delta, or Inuvik intercept points. The Dempster Highway travellers were less likely than average to be Social Sightseers or Comfort Seekers and were more likely to be Outdoor Adventurers, Cultural Connoisseurs or Vocation Voyagers.

**Figure 3-50: Dempster Highway Traveller Segments**

Segment	Percentage of Dempster Highway Travellers
Outdoor Adventurers	20%
Cultural Connoisseurs	15%
Roaming Retirees	21%
Vocation Voyagers	19%
Social Sightseers	16%
Comfort Seekers	9%

Source: 2014 Road Visitor Survey, QC24 a-i, C25a-o, C28a-o, C32a-h, Location n=67  
Road Visitor

Dempster Highway travellers had higher proportions of visitors from the U.S. (7%) and international locations (4%) compared to the overall visitor averages of 3% from the U.S. and 1% from international locations. Dempster respondents were also more likely to be male (53%).<sup>65</sup>

**Figure 3-51: Dempster Visitors**

Characteristic	Categories	Percentage
<b>Gender</b>	Male	53%
	Female	46%
<b>Country of Origin</b>	Canada	90%
	USA	7%
	International	4%
<b>Education</b>	Less than high school	2%
	High school	11%
	Some technical college/university	7%
	College/technical diploma or certificate	25%
	University degree (undergraduate)	34%

<sup>65</sup> Source: 2014 Road Visitor Survey QD8 n = 142

Characteristic	Categories	Percentage
	University degree (graduate)	20%
<b>Household Income</b>	Under \$30,000	7%
	\$30,000 to \$49,999	17%
	\$50,000 to \$69,999	20%
	\$70,000 to \$89,999	23%
	\$90,000 to \$119,999	21%
	Over \$120,000	23%

Source: 2014 Road Visitor Survey Location, QD2, QD4, QD7. n = 80.

Nearly two-thirds (65%) of Dempster Highway travellers indicated that Inuvik had been their primary travel destination, while 12% reported that the highway itself was their primary destination.<sup>66</sup> Other destinations reported by respondents include Tuktoyaktuk (13%), Yellowknife (5%), Hay River (1%), Fort Providence (1%), and Fort McPherson (1%).

More than two-thirds (69%) of visitors who did not obtain their Passport or Trip Diary from the Dempster or Inuvik intercept point indicated that their primary destination was Yellowknife, while 8% reported Hay River and 3% reported Inuvik or Fort Smith.

Dempster Highway travellers were educated, with 79% holding a college technical diploma or university degree (undergraduate or graduate).<sup>67</sup>

Overall satisfaction of those who travelled the Dempster and those who did not was the same at 4.69 out of 5.

<sup>66</sup> Source: 2014 Road Visitor Survey QA3 n = 142

<sup>67</sup> Source: 2014 Road Visitor Survey QD2 n = 142

## SECTION 4: TRENDS, CONCLUSIONS, AND RECOMMENDATIONS

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In 2014, travel group size stayed close to the 2009 to 2013 average group size while nights stayed was lower by one night. Differences in planning time illustrate that visitors spent more time planning their trip in 2014 than in 2013. Trip planning has also moved to predominantly online sources. This suggests that travellers to the NWT are interested in using technology to plan their trip.

Visitors in 2014 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. 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 the 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 0.63), 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 levels of satisfaction in order to predict variance and identify drivers of satisfaction. The scales that measure importance would not need to be adjusted from five-point to ten-point scales, but ITI could choose to do so for consistency throughout the survey.

Compared to previous years, 2014 demonstrated a low percentage of visitors' awareness of travelling the Deh Cho Travel Connection Loop. A large number of visitors were unaware of the Loop even though the majority of visitors indicated they visited communities on the Deh Cho Loop.

With the introduction of Aboriginal tourism in the Tourism 2015 plan in 2011, the percentage of visitors who participated in Aboriginal tourism increased from 2011 to 2013. In 2014 Aboriginal tourism was down, however, it was still above the 2010 level. In comparison to 2013, more visitors reported unavailability of an activity or that they could not find the activity as reasons for not participating in Aboriginal tourism. Fewer visitors also reported being not interested or unaware of what was available, indicating that the low participation was not due to disinterest or lack of available activities.

In 2014 photography and sightseeing were among the most common activities visitors participated and also had high levels of satisfaction across all visitor segments. Furthermore, the most important trip considerations for respondents were outstanding scenery and viewing wildlife. These results indicate a marketing and advertisement opportunity for ITI to promote photo contests and tours through the use of social media such as Twitter, Pinterest, Facebook and Instagram.

While business travellers are a small percentage (2%) of visitors in 2014, they provide an opportunity to expand tourism through the introduction of available activities and encouragement to return to the NWT. Business travellers are an emerging tourism segment, as the majority added two extra days to their business trip to participate in tourism activities.

## APPENDIX A: 2014 ROAD VISITOR SURVEY, WITH DESCRIPTIVE STATISTICS

**GNWT Road Visitor Survey 2014  
Appendix A – Survey Marginals<sup>68</sup>**

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 ..... **68%**
- 2. Recreational Vehicle (RV) ..... **23%**
- 3. Airplane ..... **TERMINATE**
- 4. Motorcycle ..... **2%**
- 5. Other ..... **7%**
- 98. Don't Know
- 99. No Response

**A. Trip Characteristics**

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

**Mean: 5.86**

- 1. 0 nights ..... **1%**
- 2. 1 night ..... **5%**
- 3. 2 nights ..... **12%**
- 4. 3 nights ..... **14%**
- 5. 4 nights ..... **12%**
- 6. 5 nights ..... **12%**
- 7. 6 nights ..... **11%**
- 8. 7 nights ..... **6%**
- 9. 8-10 nights ..... **14%**
- 10. 11-15 nights ..... **10%**
- 11. 16-27 nights ..... **3%**
- 12. Longer than 27 nights ..... **1%**
- 98. Don't Know
- 99. No Response

<sup>68</sup> All marginal are weighted and include outliers

A2. Was this your first trip to NWT?

1. Yes .....	<b>68%</b>
2. No .....	<b>32%</b>
98. Don't Know	
99. No Response	

A3. What was your primary destination in NWT? [Do not read]

1. Inuvik .....	<b>14%</b>
2. Yellowknife .....	<b>57%</b>
3. Hay River .....	<b>7%</b>
4. Fort Simpson .....	<b>1%</b>
5. Fort Smith .....	<b>2%</b>
6. Tuktoyaktuk .....	<b>3%</b>
7. Fort Providence .....	<b>&gt;1%</b>
8. Nahanni National Park .....	<b>2%</b>
9. Fort Liard .....	<b>1%</b>
10. Twin Falls Territorial Park (including Alexandra Falls and Louise Falls) .....	<b>0%</b>
11. Fort McPherson .....	<b>&gt;1%</b>
12. 60 <sup>th</sup> Parallel Territorial Park .....	<b>1%</b>
13. Great Slave Lake .....	<b>0%</b>
14. Dempster Highway .....	<b>3%</b>
15. Enterprise .....	<b>0%</b>
16. Fort Resolution .....	<b>0%</b>
17. Fred Henne Territorial Park .....	<b>0%</b>
18. Lady Evelyn Falls Territorial Park .....	<b>1%</b>
19. Wood Buffalo National Park .....	<b>2%</b>
20. Little Buffalo River Falls Territorial Park .....	<b>0%</b>
21. Prelude Lake Territorial Park .....	<b>0%</b>
22. Primary destination outside NWT .....	<b>0%</b>
23. Other .....	<b>7%</b>

A4: What other destinations were you considering, when planning your trip? [Do not read]

1. Yukon .....	<b>25%</b>
2. Alaska .....	<b>14%</b>
3. British Columbia .....	<b>22%</b>
4. Atlantic Canada .....	<b>1%</b>
5. Alberta .....	<b>24%</b>
6. Other – U.S. states .....	<b>2%</b>
7. Other – Canadian provinces .....	<b>6%</b>
8. Outside of Canada and U.S. ....	<b>&gt;1%</b>
9. None .....	<b>50%</b>
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 .....	55%
2. Hotel/Motel .....	46%
3. Home of friends or relatives .....	12%
4. Roadside Pullout .....	13%
5. Wilderness camping .....	6%
6. Outfitters lodge/camp .....	2%
7. Apartment/house rental .....	2%
8. Bed and Breakfast .....	8%
9. Other .....	3%

98. Don't Know

99. No Response

A6a: Who were your travel companions?

1. Alone.....	6%
2. As a couple .....	51%
3. Family .....	21%
4. Friends .....	3%
5. Co-workers.....	1%

98. Don't Know

99. Refused

A6b: Including yourself, how many people were you traveling with?

1. 1 person traveling.....	8%
2. 2 people travelling.....	53%
3. 3 people travelling .....	10%
4. 4 people travelling .....	12%
5. 5 people travelling .....	6%
6. 6 people travelling .....	4%
7. 7 or more people travelling.....	7%

99. No Response

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 .....	36%
2. Guided Fishing .....	2%
3. Unguided Fishing .....	7%
4. Hunting .....	1%
5. Guided Outdoor Adventure (eco-tourism) .....	1%
6. Unguided Adventure (eco-tourism) .....	4%
7. General Touring .....	31%
8. Visiting Friends or Relatives.....	21%
9. Business Travel .....	2%
10. Wilderness, Isolation, landscape, or wildlife .....	32%
11. Natural Phenomenon, event or attraction.....	12%

12. Always wanted to visit .....	55%
13. Culture or History .....	15%
14. Aurora Viewing .....	1%
15. Other 1.....	20%
16. Other 2 .....	3%
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
1%	1%	2%	22%	74%	1%	1%

A10: Do you plan to visit NWT again?

1. Yes .....	61%
2. No .....	9%
3. I am not sure.....	26%
98. Don't Know .....	5%
99. No Response	

If A10a=2 ask A10b

A10b. Why not?

1. _____ .....	98%
99. No response.....	2%

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

B1a: Did you add any extra time to your business trip to site see in NWT? (prompt how many extra days?)

1. Yes .....	69%
2. No .....	31%

98. Don't Know  
99. No Response

If B1a=1 ask B1b

B1b. How many extra days did you add to your trip?

1. 1 .....6%  
2. 3 .....94%  
99. No response

B2: Were any tourism related activities prearranged before you arrived in NWT?

1. Yes .....62%  
2. No .....38%  
98. Don't Know  
99. No Response

If B2= 1 ask B3

B3. Who organized the activities for you? **DO NOT READ, SELECT ONLY ONE**

1. Myself .....0%  
2. A co-worker .....0%  
3. A meeting planner .....0%  
4. A conference organizer .....100%  
5. Other.....0%  
98. Don't know  
99. No response

B4. From the following list, which tourism related activities did you participate in during your visit to NWT? **READ LIST, CHECK ALL THAT APPLY**

1. Airplane or Helicopter Tour .....0%  
2. Art Gallery Visit .....31%  
3. Art, Music or Film Festival .....33%  
4. Viewing Northern Lights .....31%  
5. Biking .....0%  
6. Bird Watching .....0%  
7. Boating, Cruising, or Sailing .....31%  
8. Buffalo Viewing .....31%  
9. Camping .....8%  
10. Canoeing, Kayaking or Rafting .....0%  
11. Guided Fishing .....0%  
12. Unguided Fishing .....0%  
13. Golfing .....0%  
14. Hiking .....37%  
15. Historic Site Visits .....67%  
16. Guided Hunting .....0%  
17. Unguided Hunting .....0%  
18. Museum Visit .....37%

19. Photography .....	31%
20. Restaurant with Northern Cuisine .....	37%
21. Shopping .....	62%
22. Sightseeing.....	98%
23. Guided Walking Town Tour .....	31%
24. Unguided Walking Town Tour .....	0%
25. Guided Vehicle Town Tour .....	31%
26. Unguided Vehicle Town Tour .....	6%
27. Wildlife Viewing.....	31%
28. Other _____	
99. Refused	

### SKIP TO D

#### C. Leisure Travellers Only (if A7 is not 9)<sup>69</sup> note: n=440

C1: The following questions are about your trip expenditures. Please indicate whether you wish to report trip expenses for yourself or for your whole travel party.

1. Myself .....	31%
2. Whole travel party .....	70%
99. No Response	

Please identify if you had costs associated with your trip and the estimated amount for each of the categories. **READ LIST**

C2: Pre-paid tour package .....	\$ 2687
C3: Travel to the NWT (fuel, airfare, etc.) (\$50-\$2500 PER PERSON PER DAY) .....	\$ 1099
C4: Hotels (\$20-\$250 PER PERSON/NIGHT).....	\$590
C5. Apartment / House rentals (\$20-\$250 PER PERSON/NIGHT).....	\$855
C6: Camping (UP TO \$50/NIGHT) .....	\$173
C7: Airfare within NWT (\$50-\$2500 PER PERSON PER DAY) .....	\$1006
C8: Vehicle / Boat Rental (\$10-\$200 PER DAY) .....	\$431
C9: Fuel (UP TO \$100 PER DAY) .....	\$381
C10: Dining(UP TO \$100 PER PERSON PER DAY) .....	\$221
C11: Groceries (UP TO \$50 PER PERSON PER DAY) .....	\$ 149
C12: Alcohol(UP TO \$30 PER PERSON PER DAY) .....	\$100
C13: Tours(UP TO \$150 PER PERSON PER DAY) .....	\$465
C14: Festivals and events (UP TO \$150/DAY) .....	\$116
C15: Arts and crafts like carvings and prints (UP TO\$500 PER PERSON) .....	\$285
C16: Souvenirs like t-shirts and mugs (UP TO \$500PER PERSON) .....	\$142
C17: Taxis and shuttles(UP TO \$150 PER PERSON PER DAY) .....	\$76
C18: Taxidermy (UP TO \$5000) .....	\$800

**Note: C2 to C19 are the mean \$ value and do not include respondents who did not enter values.**

<sup>69</sup> 4 respondents (5 with weighting) reported their primary purpose for travel to NWT was business; therefore they have been excluded in section C.

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 incurred while traveling *within* the Northwest Territories that has not already been mentioned? If so, what is the total amount of those expenses?

..... **Mean: \$512**

If C19 =1 ask C20      **note: n=62**

C20: What were these other expenditures primarily?

1. \_\_\_\_\_ ..... **100%**  
 98. Don't know  
 99. No response

C21a: How many months before your trip did you start thinking about travelling to NWT?

**note: n=429**

..... **Mean: 9.67 months**

C21b: How many months before your trip did you make a firm decision to travel to the NWT?

**note: n=423**

..... **Mean: 5.2 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.....         | <b>21%</b> | 13. Consumer/Trade show.....   | <b>2%</b>  |
| 2. The Milepost .....               | <b>22%</b> | 14. <a href="http://www.SpectacularNWT.com">www.SpectacularNWT.com</a> ..... | <b>21%</b> |
| 3. Auto clubs .....                 | <b>18%</b> | 15. <a href="http://www.NWTParks.com">www.NWTParks.com</a> .....             | <b>18%</b> |
| 4. Travel guidebooks .....          | <b>30%</b> | 16. <a href="http://www.DehChoTravel.com">www.DehChoTravel.com</a> .....     | <b>8%</b>  |
| 5. Tourism business/operator.....   | <b>9%</b>  | 17. <a href="http://www.CanadasNorth.com">www.CanadasNorth.com</a> .....     | <b>7%</b>  |
| 6. Magazine/newspaper ad .....      | <b>4%</b>  | 18. Travel Website (Trip Advisor, Expedia) .....                             | <b>12%</b> |
| 7. Magazine/newspaper article ..... | <b>4%</b>  | 19. Social Media .....   | <b>2%</b>  |
| 8. Word of Mouth .....              | <b>39%</b> | 20. Other website .....  | <b>9%</b>  |
| 9. NWT's Tourism 1-800 Number ..... | <b>5%</b>  | 21. Other (please specify) .....   | <b>5%</b>  |
| 10. Brochures, posters or maps..... | <b>32%</b> | 98. None .....   | <b>5%</b>  |
| 11. Travel Agent .....              | <b>6%</b>  | 99. No Response.....   | <b>1%</b>  |
| 12. Been here before .....          | <b>19%</b> |  |            |

C22b: Which of the following sources did you use for travel information during your trip to the Northwest Territories? (read list, check all that apply)

1. NWT Explorers Guide.....	<b>19%</b>	10. Arctic Ambassadors.....	<b>1%</b>
2. The Milepost .....	<b>23%</b>	11. <a href="http://www.SpectacularNWT.com">www.SpectacularNWT.com</a> .....	<b>4%</b>
3. Travel guidebooks .....	<b>28%</b>	12. <a href="http://www.NWTParks.com">www.NWTParks.com</a> .....	<b>4%</b>
4. Tourism business/operator.....	<b>9%</b>	13. <a href="http://www.DehChoTravel.com">www.DehChoTravel.com</a> .....	<b>3%</b>
5. Visitor information centre .....	<b>73%</b>	14. <a href="http://www.CanadasNorth.com">www.CanadasNorth.com</a> .....	<b>1%</b>
6. Word of Mouth .....	<b>41%</b>	15. Travel Website (Trip Advisor, Expedia) .....	<b>2%</b>
7. NWT's Tourism 1-800 Number .....	<b>1%</b>	16. Other website (please specify) .....	<b>2%</b>
8. Brochures, posters or maps.....	<b>43%</b>	17. Travel app (please specify) .....	<b>1%</b>
9. Social media .....	<b>1%</b>	18. Other source (please specify) .....	<b>10%</b>
		98. None .....	<b>4%</b>
		99. No Response .....	<b>1%</b>

C23a: Have you watched the show Arctic Air on television?

1. Yes, watched an entire season .....	<b>13%</b>
2. Yes, several episodes .....	<b>26%</b>
3. Yes, one episode .....	<b>15%</b>
4. No, never (SKIP TO C24) .....	<b>44%</b>
98. Don't know .....	<b>1%</b>
99. No Response .....	<b>&gt;1%</b>

C23c. How influential was Arctic Air in your decision to travel to the NWT?

1. Very influential .....	<b>7%</b>
2. Somewhat influential .....	<b>23%</b>
3. Not at all influential .....	<b>70%</b>
98. Don't know	
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)<sup>70</sup>

	Not at all important			Extremely important	
	1	2	3	4	5
a. Experiencing nature with a guide	<b>39%</b>	<b>17%</b>	<b>27%</b>	<b>11%</b>	<b>7%</b>
b. Unique or different cultural groups	<b>11%</b>	<b>5%</b>	<b>26%</b>	<b>33%</b>	<b>25%</b>
c. Physical adventure	<b>15%</b>	<b>17%</b>	<b>25%</b>	<b>27%</b>	<b>17%</b>

	1	2	3	4	5
d. Personal challenges	<b>24%</b>	<b>17%</b>	<b>23%</b>	<b>25%</b>	<b>12%</b>
	1	2	3	4	5
e. Learning opportunities	<b>5%</b>	<b>5%</b>	<b>19%</b>	<b>37%</b>	<b>34%</b>
	1	2	3	4	5
f. Viewing wildlife	<b>2%</b>	<b>2%</b>	<b>12%</b>	<b>32%</b>	<b>52%</b>
	1	2	3	4	5
g. Outstanding scenery	<b>1%</b>	<b>2%</b>	<b>4%</b>	<b>27%</b>	<b>65%</b>
	1	2	3	4	5
h. Opportunity to purchase arts and crafts	<b>17%</b>	<b>22%</b>	<b>28%</b>	<b>22%</b>	<b>11%</b>
	1	2	3	4	5
i. Number of airline transfers or layovers	<b>38%</b>	<b>12%</b>	<b>18%</b>	<b>18%</b>	<b>13%</b>

C25: On the same scale, please tell me how important is (Series D)<sup>71</sup>

	not at all important		Extremely important		
	1	2	3	4	5
a. meeting new people	<b>9%</b>	<b>9%</b>	<b>26%</b>	<b>32%</b>	<b>24%</b>
b. Parks and wilderness areas	<b>2%</b>	<b>4%</b>	<b>16%</b>	<b>34%</b>	<b>45%</b>
c. Cost of accommodation and meals	<b>7%</b>	<b>9%</b>	<b>25%</b>	<b>36%</b>	<b>23%</b>
d. Package tours to a destination	<b>34%</b>	<b>21%</b>	<b>23%</b>	<b>14%</b>	<b>8%</b>
e. Exciting nightlife and entertainment	<b>49%</b>	<b>24%</b>	<b>14%</b>	<b>12%</b>	<b>2%</b>
f. Luxury accommodations	<b>48%</b>	<b>23%</b>	<b>20%</b>	<b>8%</b>	<b>2%</b>
g. Opportunities to take organized tours	<b>23%</b>	<b>22%</b>	<b>29%</b>	<b>20%</b>	<b>5%</b>
h. Interesting shopping	<b>21%</b>	<b>22%</b>	<b>30%</b>	<b>20%</b>	<b>7%</b>
i. Having fun, being entertained	<b>13%</b>	<b>14%</b>	<b>28%</b>	<b>23%</b>	<b>23%</b>
j. Personal safety	<b>3%</b>	<b>3%</b>	<b>14%</b>	<b>28%</b>	<b>52%</b>

	1	2	3	4	5
k. High standards of cleanliness and hygiene	<b>2%</b>	<b>3%</b>	<b>19%</b>	<b>32%</b>	<b>44%</b>
l. Warm, sunny climate	<b>11%</b>	<b>20%</b>	<b>39%</b>	<b>21%</b>	<b>9%</b>
m. Reliable weather	<b>10%</b>	<b>20%</b>	<b>34%</b>	<b>27%</b>	<b>10%</b>
n. Cost to get to destination	<b>6%</b>	<b>9%</b>	<b>29%</b>	<b>38%</b>	<b>18%</b>
o. Relaxing break from work	<b>13%</b>	<b>4%</b>	<b>14%</b>	<b>27%</b>	<b>43%</b>

If they picked up their Trip Diary at Deh Cho, skip to C27

C26: Are you familiar with the Deh Cho Travel Connection Loop?

1. Yes, I travelled on the Loop this year .....	<b>27%</b>
2. Yes, but I did not travel the Loop this year .....	<b>23%</b>
3. No, I am not familiar with the Loop.....	<b>48%</b>
99. No, No response .....	<b>3%</b>

If C26=2 ask C27

C27: Why didn't you travel the Loop?

1. Not interested .....	<b>2%</b>
2. Too far out of the way .....	<b>29%</b>
3. Did not have time .....	<b>49%</b>
4. Not aware of the Loop .....	<b>5%</b>
5. Construction .....	<b>&gt;1%</b>
6. Other.....	<b>12%</b>
6. Don't know .....	<b>3%</b>
99. No response.....	<b>&gt;1%</b>
98. Don't know	
99. No Response	

C28. 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 .....	<b>16%</b>
2. Art Gallery Visit .....	<b>47%</b>
3. Art, Music, or Film Festival .....	<b>18%</b>
4. Viewing Northern Lights .....	<b>7%</b>
5. Biking .....	<b>6%</b>
6. Bird Watching .....	<b>28%</b>
7. Boating, Cruising, or sailing .....	<b>19%</b>
8. Buffalo Viewing .....	<b>59%</b>
9. Camping .....	<b>56%</b>
10. Canoeing, Kayaking, or rafting .....	<b>9%</b>



11. Guided Fishing .....	4%
12. Unguided Fishing .....	21%
13. Golfing .....	5%
14. Hiking .....	48%
15. Historic Site Visits .....	63%
16. Guided Hunting.....	1%
17. Unguided Hunting.....	1%
18. Museum Visit.....	63%
19. Photography .....	66%
20. Restaurant with Northern Cuisine .....	54%
21. Shopping .....	54%
22. Sightseeing .....	78%
23. Guided Walking Tour.....	12%
24. Unguided Walking town tour .....	41%
25. Guided Vehicle town tour .....	6%
26. Unguided vehicle town tour .....	38%
27. Wildlife Viewing .....	65%
98. Don't know .....	1%
99. No response.....	1%

C29: 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)<sup>72</sup>

	Very Dissatisfied		Very Satisfied		
a. Airplane or helicopter tour	1	2	3	4	5
	1%	0%	1%	20%	79%
b. Art Gallery Visit	1	2	3	4	5
	0%	4%	14%	33%	50%
c. Art, Music, or Film Festival	1	2	3	4	5
	0%	1%	11%	43%	45%
d. Viewing Northern Lights	1	2	3	4	5
	7%	15%	23%	2%	53%
e. Biking	1	2	3	4	5
	0%	0%	11%	32%	57%
f. Bird Watching	1	2	3	4	5
	0%	1%	28%	31%	40%
g. Boating, Cruising, or sailing	1	2	3	4	5
	0%	3%	12%	31%	55%

h. Buffalo Viewing	1	2	3	4	5
	<b>1%</b>	<b>1%</b>	<b>8%</b>	<b>24%</b>	<b>66%</b>
i. Camping	1	2	3	4	5
	<b>2%</b>	<b>2%</b>	<b>7%</b>	<b>33%</b>	<b>56%</b>
j. Canoeing, Kayaking, or rafting	1	2	3	4	5
	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>38%</b>	<b>62%</b>
l. Guided Fishing	1	2	3	4	5
	<b>0%</b>	<b>14%</b>	<b>14%</b>	<b>0%</b>	<b>73%</b>
m. Unguided Fishing	1	2	3	4	5
	<b>&gt;1%</b>	<b>1%</b>	<b>18%</b>	<b>14%</b>	<b>67%</b>
n. Golfing	1	2	3	4	5
	<b>21%</b>	<b>0%</b>	<b>43%</b>	<b>2%</b>	<b>35%</b>
o. Hiking	1	2	3	4	5
	<b>0%</b>	<b>2%</b>	<b>8%</b>	<b>31%</b>	<b>59%</b>

C30: 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			Very Satisfied	
	1	2	3	4	5
a. Historic Site Visits	1	2	3	4	5
	<b>0%</b>	<b>1%</b>	<b>13%</b>	<b>35%</b>	<b>51%</b>
b. Guided Hunting	1	2	3	4	5
	<b>0%</b>	<b>0%</b>	<b>14%</b>	<b>0%</b>	<b>86%</b>
c. Unguided Hunting	1	2	3	4	5
	<b>0%</b>	<b>0%</b>	<b>13%</b>	<b>0%</b>	<b>87%</b>
d. Museum Visit	1	2	3	4	5
	<b>1%</b>	<b>0%</b>	<b>9%</b>	<b>30%</b>	<b>61%</b>
e. Photography	1	2	3	4	5
	<b>0%</b>	<b>2%</b>	<b>7%</b>	<b>26%</b>	<b>65%</b>
f. Restaurant with Northern Cuisine	1	2	3	4	5
	<b>1%</b>	<b>6%</b>	<b>15%</b>	<b>34%</b>	<b>44%</b>
g. Shopping	1	2	3	4	5
	<b>1%</b>	<b>6%</b>	<b>25%</b>	<b>35%</b>	<b>32%</b>
h. Sightseeing	1	2	3	4	5
	<b>1%</b>	<b>1%</b>	<b>8%</b>	<b>27%</b>	<b>63%</b>
i. Guided Walking Tour	1	2	3	4	5
	<b>0%</b>	<b>1%</b>	<b>1%</b>	<b>19%</b>	<b>80%</b>
j. Unguided Walking town tour	1	2	3	4	5
	<b>0%</b>	<b>2%</b>	<b>13%</b>	<b>36%</b>	<b>50%</b>

k. Guided Vehicle town tour	1	2	3	4	5
	0%	0%	0%	27%	73%
l. Unguided vehicle town tour	1	2	3	4	5
	>1%	2%	16%	36%	47%
m. Wildlife Viewing	1	2	3	4	5
	1%	2%	7%	28%	63%

C31: Please identify any other activities you participated in on your trip that were not already mentioned.

1. _____	19%
2. _____	5%
3. _____	2%
4. None	73%
98. Don't Know	
99. No Response	

C32a: Were there any activities that you hoped to do, but were not available?

1. Yes	24%
2. No	71%
98. Don't know	4%
99. No response	2%

If C32a=1 ask C32b

C32b. Which activities?

1. _____	98%
99. No response	2%

C34a: Did you participate in any Aboriginal cultural tourism activities while on this trip?

1. Yes	31%
2. No	67%
98. Don't know	2%
99. No response	>1%

If C34a=1 ask C34b

C34b. Which activities did you participate in? **READ LIST, CHECK ALL THAT APPLY**

1. Aboriginal cultural events, festivals or performances	67%
2. Viewed an Aboriginal cultural display in a centre, museum, park or gallery	55%
3. Aboriginal cultural craft activities (i.e. tufting, basket making, carving)	21%
4. Experienced traditional Aboriginal cuisine	38%
5. Took a guided interpretive tour	18%
8. Other	15%
7. None	>1%
98. Don't Know	

99. No Response

If C34a= 2 ask C35

C35: Why did you not participate in Aboriginal tourism activities on this trip?

1. Not interested .....	<b>14%</b>
2. Too expensive .....	<b>&gt;1%</b>
3. Not available .....	<b>27%</b>
4. Difficult to access .....	<b>2%</b>
5. Did not have enough time .....	<b>31%</b>
6. Could not find what you were looking for .....	<b>13%</b>
7. Not aware of what was available .....	<b>26%</b>
8. Not one of my interests .....	<b>10%</b>
9. Other .....	<b>7%</b>
98. Don't know .....	<b>1%</b>
99. No response.....	<b>1%</b>

C36. Were you exposed to any written or spoken Aboriginal languages during your trip? **READ LIST**

1. Written languages only .....	<b>17%</b>
2. Spoken languages only .....	<b>12%</b>
3. Both written and spoken languages .....	<b>24%</b>
4. None .....	<b>44%</b>
98. Don't know .....	<b>4%</b>
99. No response	

C37: Based on your experience on this trip to NWT, please rate the following services, products and infrastructure on a scale of 1 to 5, where one is very dissatisfied and 5 is very satisfied please rate the following (**Series E**)<sup>73</sup>:

	<b>Very Dissatisfied</b>			<b>Very satisfied</b>	
	1	2	3	4	5
a. Service in hotels, motels and bed and breakfasts	<b>2%</b>	<b>1%</b>	<b>13%</b>	<b>42%</b>	<b>42%</b>
b. Value for your money in hotels, motels and bed and breakfasts	<b>2%</b>	<b>9%</b>	<b>24%</b>	<b>40%</b>	<b>24%</b>
c. Campground service and amenities	<b>1%</b>	<b>2%</b>	<b>10%</b>	<b>32%</b>	<b>55%</b>
d. Value for money in campgrounds	<b>2%</b>	<b>1%</b>	<b>16%</b>	<b>24%</b>	<b>58%</b>
e. Restaurant service	<b>3%</b>	<b>1%</b>	<b>16%</b>	<b>43%</b>	<b>38%</b>

f. Value for money at restaurants	1	2	3	4	5
	<b>4%</b>	<b>5%</b>	<b>25%</b>	<b>43%</b>	<b>24%</b>
g. The selection of arts and crafts	1	2	3	4	5
	<b>1%</b>	<b>3%</b>	<b>19%</b>	<b>41%</b>	<b>36%</b>
h. The price of arts and crafts	1	2	3	4	5
	<b>2%</b>	<b>11%</b>	<b>37%</b>	<b>37%</b>	<b>13%</b>

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	
	1	2	3	4	5
a. Signage	1	2	3	4	5
	<b>2%</b>	<b>3%</b>	<b>11%</b>	<b>40%</b>	<b>44%</b>
b. Roads and highways	1	2	3	4	5
	<b>5%</b>	<b>11%</b>	<b>29%</b>	<b>34%</b>	<b>22%</b>
c. Airports	1	2	3	4	5
	<b>0%</b>	<b>2%</b>	<b>9%</b>	<b>48%</b>	<b>41%</b>
d. Visitor centres	1	2	3	4	5
	<b>1%</b>	<b>0%</b>	<b>5%</b>	<b>21%</b>	<b>74%</b>
e. Variety of tours	1	2	3	4	5
	<b>&gt;1%</b>	<b>4%</b>	<b>27%</b>	<b>39%</b>	<b>30%</b>
f. Cleanliness of towns	1	2	3	4	5
	<b>&gt;1%</b>	<b>2%</b>	<b>18%</b>	<b>42%</b>	<b>37%</b>
g. Taxis/shuttle availability	1	2	3	4	5
	<b>0%</b>	<b>2%</b>	<b>24%</b>	<b>23%</b>	<b>52%</b>
h. Taxi/shuttle service	1	2	3	4	5
	<b>0%</b>	<b>0%</b>	<b>25%</b>	<b>24%</b>	<b>51%</b>

#### D. Demographics

D1: Can you please tell me the where you live?

- City? \_\_\_\_\_
  - State/Province? \_\_\_\_\_
  - Postal Code? \_\_\_\_\_
99. No Response

[Web] Please fill in your address

- a. City? \_\_\_\_\_
- b. State/Province? \_\_\_\_\_
- c. Postal Code/Zip Code? \_\_\_\_\_
- d. And you live in (recall country) \_\_\_\_\_
- 99. No Response

D2: What is the highest education level you have achieved?

- 1. Less than high school .....5%
- 2. High school .....17%
- 3. Some technical college / university .....6%
- 4. College / technical diploma or certificate .....26%
- 5. University degree (Bachelor's / undergraduate) ..... 32%
- 6. University degree (Masters / Ph.D./ graduate) .....13%
- 98. Don't know .....1%
- 99. No response.....3%

D3: Which category **best** describes your current occupation? **READ LIST**

- 1. Professional .....15%
- 2. Management .....6%
- 3. Education .....5%
- 4. Trades .....6%
- 5. Clerical .....2%
- 6. Retail .....2%
- 7. Health care .....0%
- 8. Self-employed .....6%
- 9. Student .....1%
- 10. Retired .....49%
- 11. Or unemployed? .....1%
- 12. Other .....6%
- 13. Homemaker .....0%
- 98. Don't Know
- 99. No Response .....1%

D4: In which range is your approximate annual household income? **READ LIST**

- 1. Is it under \$30,000 .....6%
- 2. \$30,000 to less than \$50,000 .....20%
- 3. \$50,000 to less than \$70,000 .....26%
- 4. \$70,000 to less than \$90,000 .....17%
- 5. \$90,000 to less than \$120,000 .....15%
- 6. Over \$120,000 .....17%
- 98. Don't know .....3%
- 99. No response.....22%

D5: What age do you fall under?

1. Under 19 .....	<b>1%</b>
2. 20-34 years .....	<b>7%</b>
3. 34-44 years .....	<b>11%</b>
4. 45-54 years .....	<b>14%</b>
5. 55-64 years .....	<b>33%</b>
6. 65 and over .....	<b>35%</b>
99. No response.....	<b>&gt;1%</b>

D6: 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 D6= Yes Record name and contact information in separate database

D7: Is [RECALL PHONE NUMBER] the correct number to reach you?

**RECORD GENDER**

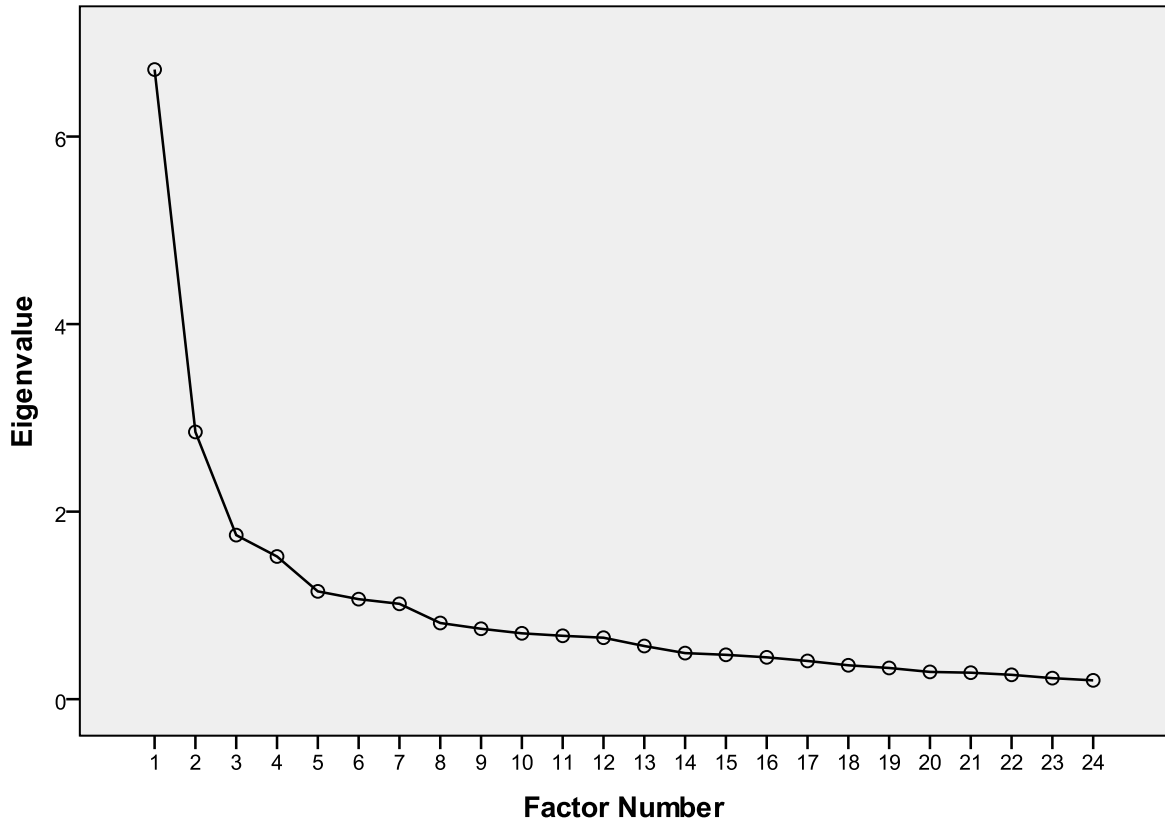
Male.....	<b>38%</b>
Female.....	<b>61%</b>
No response .....	<b>1%</b>

**Thank you for filling out this survey!**

## APPENDIX B: FACTOR ANALYSIS SCREE PLOT AND EIGENVALUES



Scree Plot



Analysis weighted by weight

**Figure 2-2: Total Variance Explained**

Factor	Total Variance Explained						Rotation Sums of Squared Loadings <sup>a</sup>
	Initial Eigenvalues			Extraction Sums of Squared Loadings			
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	
1	6.714	27.977	27.977	6.263	26.094	26.094	4.304
2	2.850	11.873	39.850	2.437	10.154	36.248	2.373
3	1.750	7.290	47.139	1.335	5.561	41.809	3.593
4	1.522	6.340	53.479	1.089	4.536	46.345	2.525
5	1.150	4.790	58.269	.705	2.936	49.281	3.439
6	1.067	4.444	62.713	.646	2.691	51.972	1.922
7	1.017	4.236	66.949	.546	2.275	54.247	2.853
8	.812	3.384	70.333				
9	.751	3.129	73.462				
10	.702	2.926	76.388				
11	.676	2.816	79.204				
12	.655	2.731	81.935				
13	.567	2.361	84.296				
14	.491	2.047	86.343				
15	.473	1.970	88.313				
16	.446	1.859	90.172				
17	.407	1.698	91.870				
18	.361	1.506	93.376				
19	.333	1.386	94.761				
20	.291	1.211	95.972				
21	.282	1.176	97.148				
22	.260	1.082	98.230				
23	.224	.934	99.164				
24	.201	.836	100.000				

Extraction Method: Principal Axis Factoring.

a. When factors are correlated, sums of squared loadings cannot be added to obtain a total variance.



## 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 and the analysis was conducted again in 2014. 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 4.71 out of 5. Seventy-four percent of all respondents rated their overall satisfaction 5 out of 5, and less than 2% of respondents rated overall satisfaction as less than 3 out of 5. As a result, the standard deviation for overall satisfaction was only 0.61. 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 the importance of trip characteristics and satisfaction with activities they participated in (C28a-n, C29a-m, and C30a-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**

Table D-1: 60th Parallel – Road Visitor Survey Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	297	130
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	19	1
<b>Invalid Sample</b>		
Wrong number/not in service	33	12
Duplicate record	7	11
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	19	7
Called maximum number of times	61	14
Respondent stated they prefer to complete survey online, however did not complete the survey.	0	0
Began online but did not finish	0	0
Email invitations were sent- no response received	13	2
<b>TOTAL</b>	<b>449</b>	<b>177</b>

Table D-2: Dempster Delta - Road Visitor Survey Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	91	120
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	10	5
<b>Invalid Sample</b>		
Wrong number/not in service	15	21
Duplicate record	2	3
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	3	5
Called maximum number of times	23	13
Respondent stated they prefer to complete survey online, however did not complete the survey.	1	0
Began online but did not finish	0	0
Email invitations were sent- no response received	8	14
<b>TOTAL</b>	<b>153</b>	<b>181</b>

Table D-3: Fort Simpson - Road Visitor Survey Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	22	7
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	8	0
<b>Invalid Sample</b>		
Wrong number/not in service	1	1
Duplicate record	1	0
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	1	1
Called maximum number of times	1	0
Respondent stated they prefer to complete survey online, however did not complete the survey.	0	0
Began online but did not finish	0	0
Email invitations were sent- no response received	0	1
<b>TOTAL</b>	<b>34</b>	<b>10</b>

Table D-4: Hay River VIC - Road Visitor Survey Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	14	0
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	2	1
<b>Invalid Sample</b>		
Wrong number/not in service	3	2
Duplicate record	1	0
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	0	0
Called maximum number of times	4	1
Respondent stated they prefer to complete survey online, however did not complete the survey.	0	0
Began online but did not finish	0	0
Email invitations were sent- no response received	1	0
<b>TOTAL</b>	<b>25</b>	<b>4</b>



Table D-5: Northern Frontier VIC - Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	54	56
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	11	38
<b>Invalid Sample</b>		
Wrong number/not in service	6	18
Duplicate record	0	2
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	3	9
Called maximum number of times	8	18
Respondent stated they prefer to complete survey online, however did not complete the survey.	0	0
Began online but did not finish	0	0
Email invitations were sent- no response received	2	10
<b>TOTAL</b>	<b>84</b>	<b>151</b>

Table D-6: Inuvik VIC – Road Visitor Survey Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	n/a	22
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	n/a	4
<b>Invalid Sample</b>		
Wrong number/not in service	n/a	6
Duplicate record	n/a	0
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	n/a	2
Called maximum number of times	n/a	6
Respondent stated they prefer to complete survey online, however did not complete the survey.	n/a	0
Began online but did not finish	n/a	0
Email invitations were sent- no response received	n/a	0
<b>TOTAL</b>	<b>n/a</b>	<b>44</b>

Table D-6: Deh Cho Connection Loop Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	85	7
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	9	3
<b>Invalid Sample</b>		
Wrong number/not in service	30	0
Duplicate record	4	2
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	5	1
Called maximum number of times	73	3
Respondent stated they prefer to complete survey online, however did not complete the survey.	1	0
Began online but did not finish	3	0
Email invitations were sent- no response received	0	0
<b>TOTAL</b>	<b>210</b>	<b>16</b>

Table D-7: Dempster Highway Passport Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	40	99
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	1	10
<b>Invalid Sample</b>		
Wrong number/not in service	38	76
Duplicate record	22	5
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	1	28
Called maximum number of times	16	33
Respondent stated they prefer to complete survey online, however did not complete the survey.	0	0
Began online but did not finish	0	0
Email invitations were sent- no response received	0	40
<b>TOTAL</b>	<b>118</b>	<b>291</b>

Table D-7: Inuvik Call Outcomes	2013	2014
<b>Completions</b>		
Completed telephone and online	n/a	4
<b>Non-Qualifiers</b>		
Respondent is from NWT or arrived by air	n/a	0
<b>Invalid Sample</b>		
Wrong number/not in service	n/a	0
Duplicate record	n/a	1
<b>Refusals/Not Traceable</b>		
Visitor refusal to participate	n/a	0
Called maximum number of times	n/a	1
Respondent stated they prefer to complete survey online, however did not complete the survey.	n/a	0
Began online but did not finish	n/a	0
Email invitations were sent- no response received	n/a	0
<b>TOTAL</b>	<b>n/a</b>	<b>6</b>

## APPENDIX E: COMPARISON OF SEGMENT DEMOGRAPHICS AND TRIP CHARACTERISTICS

Table E-1: Comparison of Segment Demographics

Characteristic	Categories	Outdoor Adventurer	Comfort Seeker	Cultural Connoisseur	Roaming Retiree	Social Sightseer	Vacation Voyager
<b>Gender</b>	Male	43%	39%	45%	34%	33%	37%
	Female	57%	56%	55%	66%	67%	63%
<b>Country of Origin</b>	Canada	96%	98%	93%	97%	98%	93%
	USA	3%	2%	6%	2%	1%	5%
	International	1%	1%	1%	1%	1%	2%
<b>Education</b>	Less than high school	1%	4%	0%	17%	3%	0%
	High school	9%	9%	12%	9%	24%	6%
	Some technical college/university	10%	12%	1%	9%	4%	6%
	College/technical diploma or certificate	23%	51%	30%	20%	22%	29%
	University degree (undergraduate)	49%	19%	25%	32%	37%	32%
	University degree (graduate)	9%	5%	32%	13%	10%	27%
<b>Household Income</b>	Under \$30,000	13%	6%	0%	5%	4%	2%
	\$30,000 to \$49,999	18%	15%	5%	22%	23%	11%
	\$50,000 to \$69,999	29%	25%	24%	26%	25%	28%
	\$70,000 to \$89,999	13%	20%	9%	25%	17%	24%
	\$90,000 to \$119,999	13%	19%	26%	13%	12%	14%
	Over \$120,000	15%	15%	37%	10%	20%	21%

Table E-2: Comparison of Segment Trip Characteristics

Characteristic	Outdoor Adventurer	Comfort Seeker	Cultural Connoisseur	Roaming Retiree	Social Sightseer	Vacation Voyager
Number of Nights	6.2	5.4	6.2	6.0	5.9	5.9
Travel Party Size	3	2.9	2.9	2.9	3.2	3.1
Trip Planning (Firm Decision to Visit NWT)	5.9 months	4.8 months	4.7 months	5.2 months	4.3 months	8.2 months
Main Purpose of Travel	Wilderness, isolation, landscape or wildlife	Always wanted to visit	Always wanted to visit	Always wanted to visit	Always wanted to visit	Always wanted to visit
Return Visitor	25%	37%	14%	39%	32%	32%
Plan to Return	76%	45%	61%	66%	71%	46%
Important Vacation Considerations	Outstanding scenery	Outstanding scenery	Outstanding scenery	Outstanding scenery	Personal safety	Outstanding scenery
	Viewing wildlife	Parks and wilderness areas	Cleanliness and hygiene	Viewing wildlife	Meeting new people	Parks and wilderness areas
	Physical adventure	Relaxing break from work	Personal Safety	Personal safety	Having fun being entertained	Viewing wildlife
Least Important Vacation Considerations	Luxury accommodations	Luxury accommodations	Luxury accommodations	Exciting nightlife	Luxury accommodations	Luxury accommodations
	Package tours to a destination	Package tours to a destination	Exciting nightlife	Luxury accommodations	Exciting nightlife	Exciting nightlife
	Exciting nightlife	Exciting nightlife	Opportunity to purchase arts and crafts	Personal challenges	Experiencing nature with a guide	Number of airline transfers