



BEN WEILAND / AMWT

NORTHWEST TERRITORIES TOURISM

WELCOMING VISITORS

2022/23 MARKETING PLAN

SPECTACULAR
NORTHWEST TERRITORIES



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EXECUTIVE SUMMARY

Again, this year's marketing plan comes at a time when travel restrictions issued by the Office of the Chief Public Health Officer have restricted leisure travel to the Northwest Territories. Canada's borders have opened to international visitors, yet COVID-19 is still causing havoc across the globe. Uncertainty remains about when and where restrictions on travel or gatherings will be lifted in the Northwest Territories. We are not alone in this challenge, as the whole world is grappling with the impacts of COVID-19. The global tourism economy is feeling the effects.

With rapidly changing external factors, continued uncertainty regarding timelines for border re-openings and, with resident perceptions about travel and visitors influenced by communications regarding COVID-19, the role of NWT Tourism's marketing for the tourism industry's recovery and eventual return to resilience is critical.

This year's marketing plan for the Northwest Territories builds on the steps taken last year in response to our quickly changing external environment. We have continued to shift some marketing resources back to operator support programs. We have also built flexibility in our plan to work with our core funding partner, the Government of the Northwest Territories (GNWT), to monitor those needs and adjust accordingly. This approach enables the continued availability of relief programs by the GNWT for our industry to protect important destination development and marketing investments made by the private and public sectors.

While our target audience has traditionally been outside of the NWT, this plan includes a second year for northern staycation marketing, which targets NWT residents. Encouraging NWT residents to travel within the territory and enabling stronger connections between local residents and tourism operators offering spectacular visitor experiences, will build pride of place and resident hospitality for visitors. These are important foundations that will help NWT residents become comfortable and welcoming to visitors from outside of the territory once again, when the time is right.

As borders across Canada begin to open up for visitors and our territory also signals its readiness to host travellers from outside of the territory, NWT Tourism will be prepared. Premium story content produced will showcase spectacular stories that compel Canadians to visit our territory. This will also encourage communities to become tourism champions. General sales agents in key international markets will continue to nurture our long-term travel relationships, which are important to position the territory for recovery of international markets in the future. Strategic partnerships with Destination Canada and new funding support from the Canadian Northern Economic Development Agency will strengthen our core investments. Underpinning all of this work will be flexibility in timing and tactics, sensitivity to NWT residents' readiness to welcome visitors and a passion by NWT Tourism's marketing staff and our industry partners who work hard to showcase and share this spectacular territory.



ABOUT US

Northwest Territories Tourism (NWTT) is a not-for-profit organization and destination marketing organization (DMO) for the Northwest Territories. It is a role carried out on behalf of the Government of the Northwest Territories (GNWT).

NWT Tourism was established in 1996 to represent the tourism industry of the NWT. Funding provided by the GNWT established a DMO and TIA (Tourism Industry Association). The GNWT continues to contract NWT Tourism to market the territory on its behalf. Our work is made possible through core funding agreements established with the Government of the Northwest Territories (GNWT). We leverage these resources through other publicly funded partnerships, which include the Canadian Northern Economic Development Agency (CanNor), Destination Canada (DC), and the Indigenous Tourism Association of Canada (ITAC). Memorandum of Understanding (MOU) agreements are in place with other partners including Parks Canada and Le Conseil de Développement Économique des Territoires du Nord-Ouest (CEDTNO).

NWT Tourism serves approximately 200 member businesses connected to the tourism industry. The organization is governed by a board of directors that includes elected representation from the tourism industry, reflecting the varied sectors and regions and appointed directors that represent Indigenous governments from across the Northwest Territories. Marketing plans are presented to the board, our members, funding partners, and the Tourism Marketing Advisory Council (TMAC), who provide input and feedback on target markets and marketing plans.

NWT Tourism's main office is in Yellowknife, where we have an experienced team with expertise in direct-to-consumer marketing, travel trade, travel and social media, and MCIT (Meetings, Conferences, & Incentive Travel). Our team is proudly supported by a professional northern Agency of Record (AOR), Outcrop Communications. In addition, we retain vital contractors in primary markets communicating to consumers in North America and around the globe in multiple languages, including French, German, Japanese, Korean, Mandarin, Cantonese, and English.

We work closely with local, regional, national, and international partners to promote the Spectacular brand and uphold our destination's reputation, increase awareness of the NWT as a travel destination, and ultimately increase visitation and visitor revenues to the NWT when the time is right.

OUR VISION CONTINUES TO BE: *A thriving, vibrant, sustainable and successful tourism industry.*

MISSION: *To grow the tourism industry for the NWT to support a strong and sustainable economy.*

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OUR SPECTACULAR BRAND

The spectacular brand promises visitors a destination to immerse themselves in a world of multi-sensory experiences that are surprising and rejuvenating. These experiences leaves a visitor forever changed. In a time where they are so precious, the NWT gives its visitors wide-open spaces, open roads and spectacular landscapes that evoke a sense of calm. Our people are friendly, hospitable and generous. They are also natural storytellers. Like the land they live in, Northerners can be quirky, honest, and full of surprises.

The Northwest Territories is the third-largest jurisdiction in Canada by area, and one of the smallest by population. The Northwest Territories offers amazing skies, hundreds of lakes and rivers, towering mountains, vast plains, expansive ocean coastlines, and abundant wildlife. These are all part of the Northwest Territories' brand assets. Its enormity, geographic diversity, northern location, authentic Indigenous cultures, and friendly people offer something extraordinary to visitors in a land that offers so many spectacular moments.

The Northwest Territories continues to share Spectacular. The Spectacular NWT brand promises a Northwest Territories that offers spectacular scenery, experiences, and adventure.

OUR BRAND PROMISE:

The Northwest Territories offers discovery – a wonderfully child-like type of discovery. We offer the thrill of a first-time experience, the surprise of discovering something new, the reward of trying something you have never done before. Spectacular NWT is simplicity, surprise, and awe. Something here will change you.





FUNDING AND PARTNERSHIPS

Tourism supports, and is supported by, Northerners. It touches all other sectors of the NWT. The NWT relies on tourism, which plays a vital role in the social, cultural, and economic strength of the Territory. Tourism is a driver for good. The tourism industry's success depends on the teamwork of many people, communities, regions, and partner organizations. NWT Tourism has close relationships and funding agreements with organizations that share NWT Tourism's interest in a vibrant tourism economy. At the heart of this is our primary funding partner, the Government of the Northwest Territories. A like-minded partnership approach to marketing provides greater strength, unity, and leveraged results, which will more effectively market the destination together compared to individual efforts.

GOVERNMENT OF THE NORTHWEST TERRITORIES (GNWT)

The primary focus of marketing activities is on the Canadian market, from which most of our visitors come. This focus is more of a priority than ever. The importance of connecting with Canadians to build awareness of the NWT is key to the tourism industry's recovery and resilience.

Domestically, NWT marketing focuses on direct marketing to the consumer, and this is carried out primarily through digital platforms delivered by an Agency of Record (AOR) and its partners. In addition to these core activities, social media is used to elevate the NWTT's presence on social media platforms. NWTT maintains a successful and functional working relationship between partners, so that activities can be scaled and repurposed to all markets possible with a consistent brand narrative.

To ensure success in other markets, by language, geographic location, in various sectors and through multiple channels, NWT Tourism also engages general sales agents (GSAs), marketing agencies, contractors, and industry partners. As partners, we work together to carry out the core program, reaching both domestic and international audiences.

Core marketing works to promote the whole Northwest Territories and all the spectacular experiences available to visitors. To ensure success in representing each region, NWTT works closely with the GNWT's regionally based tourism staff to focus specifically on marketing the products, experiences, and activities unique to each region. While these elements may be showcased in a collective approach, ensuring a balance of regional content in marketing activities is essential. Regional partnerships are crucial to aligning NWTT objectives and strategies to the goals of communities and local tourism economies. Regional tourism offices collaborate on regionally focused projects ranging from content development, marketing programs, FAM tours and marketing campaigns.

NWT CONFERENCE BUREAU

The Government of the NWT provides funding to NWT Tourism in partnership to operate the NWT Conference Bureau (NWT CB). The Bureau works to attract meetings and conferences to the NWT. The primary activities aim to solicit, prepare, and submit bids to host conferences and events in the NWT. This objective is primarily achieved through follow-up on sales leads generated through marketing efforts and attendance at industry trade show events.

The NWT Conference Bureau continues to build resilience in the meetings, conferences, and incentive travel (MCIT) markets by continued investment in online digital advertising coupled with the development of modern visual assets such as virtual tours and virtual experiences.

CANADIAN NORTHERN ECONOMIC DEVELOPMENT AGENCY (CANNOR)

CanNor was established in 2009 to develop a diversified, sustainable, and dynamic economy across Canada's three northern territories. CanNor fosters growth and economic development in Canada's North by delivering programs that respond to the financial challenges we face and to create economic opportunities in the North. Since its inception, CanNor has been a valued partner to NWTT and has contributed funding to support a diverse range of marketing activities that target critical domestic and international markets.

This funding has enabled NWT Tourism to explore and open new geographic markets without reducing efforts in existing and proven markets. NWT Tourism continues to partner with CanNor to undertake market research and to enhance core destination marketing efforts. In addition, CanNor's funding has enabled increased investment in our digital marketing efforts - in particular on our web offerings - to all target audiences. CanNor works with NWTT, GNWT and other tourism partners, offering support to the northern economy by supporting the development and promotion of the tourism industry of the Northwest Territories.

DESTINATION CANADA (DC)

The Canadian Tourism Commission operates as Destination Canada (DC) - Canada's destination marketing organization (DMO). DC historically has promoted tourism to Canada in international markets in collaboration with its Canadian tourism industry partners. While always providing important market intelligence and industry data to its partners, DC's marketing has increased focus on connecting people with its 'Nice' country initiative and building ambassadorship and resilience in the tourism industry. Destination Canada leads by example and unites partners in a Team Canada approach to promoting Canadian tourism. DC shares Canada's collective voice with people across the nation and around the world.

DC offers partnerships and works with its partners to enable shared marketing activity and, specifically with NWTT, to leverage additional funding for our core marketing efforts. NWTT works closely with DC and its team of experts.



JULIEN SCHRODER / NWT

INDIGENOUS TOURISM ASSOCIATION OF CANADA (ITAC)

ITAC is a national not-for-profit organization that creates partnerships between associations, organizations, government departments, and industry leaders across Canada to support Indigenous tourism growth. It also works to address the demand for the development and marketing of authentic Indigenous experiences. ITAC allocates funds for each province and territory to support Indigenous tourism activities. NWT Tourism's partnership with ITAC aims to promote Indigenous Tourism in the NWT. Focusing on improving the representation of authentic Indigenous experiences, NWT and ITAC work together to develop marketing activities that highlight unique Indigenous experiences.

CONSEIL DE DÉVELOPPEMENT ÉCONOMIQUE DES TERRITOIRES DU NORD OUEST (CDETNO)

CDÉTNO is a territorial non-profit organization that develops services to support the economic development and employment of Francophones in the NWT. NWT Tourism works in partnership with CDETNO in engaging with the Francophone audience on our French social media page. We ensure that there is a native French-speaking contact who can effectively inform and communicate with Francophones on the spectacular sights and activities available in the NWT. Previous domestic market research done by Environics on behalf of the NWT, indicates a lack of destination awareness. Past research

and more recent studies conducted on the psychological profile of the targeted domestic Francophone market has been used to inform our French social media. Implementation of this strategy will ensure that we capture the attention of this market, build destination awareness, and eventually lead Francophones down the marketing funnel.

INDUSTRY PARTNERS

NWT Tourism offers a wide variety of collaborative marketing opportunities tailored for local tourism operators. These cooperative opportunities allow members to tap into NWT Tourism's core marketing activities. This includes discounted rates to participate in consumer travel shows and marketing events as well as digital and social media advertising. Although the cooperative program is built with the tourism operator in mind, the program also promotes engagement with ancillary organizations such as Parks Canada as well as regional and/or community tourism development officers. Cooperative marketing partnerships are included in NWT Tourism's overall budget, with the goal of building the tourism economy of the NWT.

In addition to paid marketing efforts, NWT Tourism also establishes Familiarization (FAM) rates with industry partners for the mutual benefit of the tourism industry. These discounted rates from private sector partners, support NWT Tourism's marketing projects in media, trade and MCIT familiarization (FAM) tours, and enable NWT Tourism to stretch its marketing budget further.



THE MARKETING ENVIRONMENT

The visitor economy is the connection of people to places and the sharing of the world around us. This creates a positive social, cultural, and economic return that is centred around the sustainable celebration of the natural environment. Tourism is an industry influenced by local, territorial, national, and international political situations and events. As we look ahead, the COVID-19 pandemic remains the most dominant.

Similar to the aftermath of 9/11, COVID-19 has caused unprecedented changes to how travellers are screened at land, air and sea border crossings. However, unlike 9/11 and the overall consistency of security measures implemented, the rules and procedures for screening travellers in a post-COVID-19 world are unlikely to be anywhere near as consistent.

With evidence mounting that fully vaccinated individuals can be infected and transmit the COVID-19 virus, there is growing acceptance that COVID-19 will not be defeated and will become endemic. As border admission rules frequently change in reaction to variants and related factors, a continued focus on domestic, regional and drive-to vacations will prevail as international travel and events present increased risk.

The uncertainty of the pandemic and related rapid changes in the tourism marketing environment have driven changes in how Canada's national and regional destination marketing partners are working together. There is quick information sharing, research, learnings, and critical developments in a fast-changing marketing environment. Key partners such as Destination Canada, Indigenous Tourism Association of Canada, Destination BC, as well as cities including Edmonton, Calgary, Toronto and Vancouver, and northern counterparts have increased collaboration to provide a support network. Our shared goal is a coordinated Canadian response and recovery for the tourism industry.

As we look toward the recovery of tourism in the NWT and the marketing environment in which that will occur, the destination must ask - 'What sets us apart?' The re-emergence of tourism will see a busy marketplace where consumers are spoiled for choice. Therefore, marketing efforts to engage our target audience will need to showcase our iconic points of difference and provide potential visitors with a strong value proposition. Equally as important, we will need to know who our target audience is and be targeted in our messaging where possible.

NWTT continues to anticipate, monitor, and adaptively respond to the rapidly changing geopolitical and pandemic landscape in this setting. Our marketing approach in the years ahead is again flexible. It is aimed at strengthening brand ambassadorship in the NWT, building awareness of the NWT in our target markets, and engaging potential visitors to plan a trip to the NWT when the time is right.

TOURISM IN THE NWT

Marketing funds were again redirected to enable financial supports for the tourism industry and, as we began the fiscal year, visitation to the territory had been halted. Due to the COVID-19 pandemic and public health orders from the Chief Public Health Officer, travel restrictions closed the NWT to tourism. At the time of writing, the NWT is still closed to leisure travel. Marketing during the Pandemic was modified to include the promotion of intra-territorial activities to NWT residents while continuing to maintain destination awareness in national and international markets. Intra-territorial marketing efforts have become commonly known as ‘staycation’ marketing within the territory.

Results reporting from our staycation marketing efforts throughout 2020/21 have indicated that, although many operators have had some success attracting locals to their businesses, staycation marketing will not replace the \$210 million in visitor spend reported in 2018/2019. Some operators can adapt their business model to the new landscape, whereas for others, this adjustment is not possible due to fundamental structural constraints within their businesses. Added pressures such as fluctuating flight schedules, isolation protocols and capacity restrictions contribute to the challenges of doing business in the post-pandemic landscape.

Some operators have experienced measured success in advertising and selling to the local market as approved remote tourism operators but many are those operators, that already

focused on local markets. Other operators who have been able to shift their business focus to activities that have appeal for northerners, have maintained some level of business. Weekend lodge experiences, custom fishing trips and paddling operators delivering day camps or paddling courses, all performed reasonably well over the summer months. Overall, the visitor economy of the NWT relies on leisure travel across the NWT border. Prior to the impact of the pandemic, the two main product category contributions were from business travel and Aurora viewing—two categories that are a result of visitors coming into the NWT.

CONNECTING WITH CANADIANS

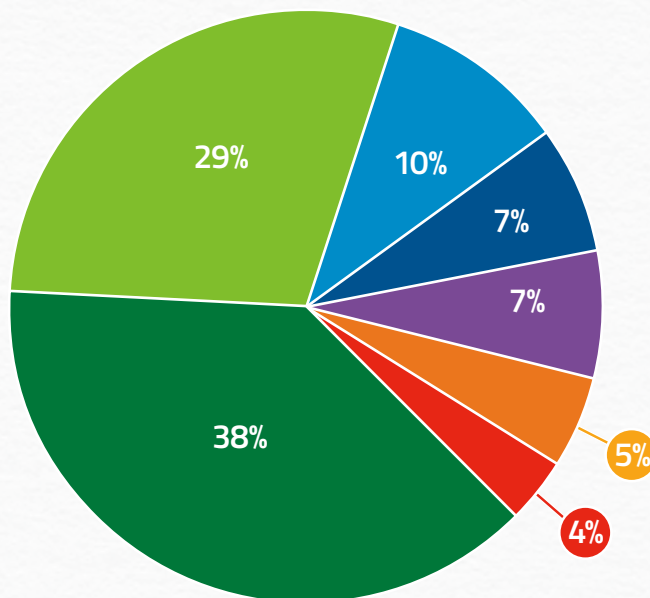
Canadian residents remain the primary market for potential visitors to the NWT. With no leisure travel to the NWT possible at the time of writing, it is essential that the path forward remains flexible. It will continue to evolve in response to the global situation and to federal and territorial travel restrictions.

NWTT’s marketing efforts continue to focus on specific Canadian audiences and to connecting Canadians to the North. When the leisure travel restrictions ease, we expect the Visiting Friends and Relatives (VFR) market will be the first to rebound. With resident sentiment toward visitors top of mind for tourism marketing, we anticipate that the first visitors to the NWT and its communities, will be Canadians who have either a connection to, or who are already intrigued by the North and exploring the idea of a northern adventure.

Pre-Pandemic Visitor Spend Percentages 2018-19

BY PRODUCT CATEGORY

- Business Travel
- Aurora Viewing
- General Touring
- Outdoor Adventure
- Fishing
- Visiting Friends/Relatives
- Hunting



Canadians demonstrated a desire to explore their backyard in the summer of 2020 and travel domestically. While much of this was attributed to the inability to travel internationally, there remains a desire to stay close to home and take shorter trips in the geographic regions nearby. NWTT anticipates increased road traffic across Canada and in the territory once the restrictions ease, as many Canadians will feel more comfortable taking a road trip instead of flying abroad.

The NWT is a unique destination in Canada, and NWTT sees this as an opportunity to boost destination awareness in southern audiences who desire wide-open space to explore. Destination Canada's Global Tourism Watch research has shown that Canadians are more likely to participate in outdoor and nature-based activities during trips with fewer crowds. That spectacular environment and setting are precisely what the NWT can offer visitors. NWT Tourism is excited by the opportunity of sharing our spectacular destination and building awareness that the NWT is the best place for Canadian domestic travellers to visit when the time is right.

CONNECTING WITH FRENCH CANADIANS

While the French-speaking market is not considered a primary market, there is great potential in investing our energies in attracting these consumers. To better understand and effectively target the French market, NWTT asked Environics to conduct a two-wave study (2019 - 2020) involving Montreal travellers. This study revealed that more Montrealers are unfamiliar with the destination compared to domestic consumers in our primary markets.

However, an increasing number of Montrealers compared to consumers in other large Canadian cities, are in the early path to purchase. They have not considered a trip to the NWT before, but are wanting to visit one day. The findings uncovered by this study, as well as Environics psychographic research on the Francophone traveller, has informed NWTT's French social media strategy. This strategy outlines key marketing messages and tactics to lure the domestic and international Francophone audience. Clear and scalable goals were set out for the French social media page. The implementation of this strategy will not only ensure that more Francophones, both domestic and international, are made aware of NWT's product offerings but also that relevant and attractive content shared on this platform will provide inspiration. It will further guide the consumer down the marketing funnel towards ultimately making the decision to visit the NWT.

THE GLOBAL TOURISM ENVIRONMENT

Both 2020 and 2021 have had a significant lasting impact on the global travel landscape and continue to change the way consumers travel as we look to the future. After 2019 set the record for the best year for Canadian tourism with over 22.1 million international travellers, the pandemic in 2020 and its persisting challenges throughout 2021 have created unprecedented devastation for the tourism and hospitality industry. Across the globe, destinations and governments are focused on keeping residents healthy and economies alive while rebounding positively from COVID-19 implications. Travel, leisure and tourism businesses have had to face serious business decisions, with little to no revenue resulting in staff layoffs, downsizing, selling assets or closing the doors.

The announcement of viable COVID-19 vaccines lead to the hope that we would see easing of pandemic restrictions. However, strict international travel bans and quarantine rules have been put in place - differing by location and vaccine availability - which has led to confusion and mixed messages of where consumers can travel safely. The spread of new variants including the Delta variant, has added even more complexities to international travel. The pace of recovery will be driven by travel conditions in both the travellers' home regions and chosen destinations. According to TIAC research, it is known that most businesses don't anticipate getting back to 2019 sales volume levels until 2024-2025. In addition, we know from Destination Canada research that tourism exports remained subdued, declining 91.9% year-over-year, which translates to \$3.4 billion in lost revenue as international borders remained closed during the first quarter of 2021. Key market segments including group travel, business/bleisure, VFR and day/overnight have been severely impacted.

Looking to the future and regrowth of tourism globally, NWT Tourism recognizes the importance of our international partners and relationships built over the years. Their role will be vital in rebuilding tourism. NWTT will continue to have a focus on our key global geographic markets, including Germany, Australia, Japan, South Korea, China and Mexico. Our investments, activities and support for these markets are determined based on their classification as primary, secondary or emerging, and the status of their region in relation to the pandemic. All new core content NWT Tourism produces is done with our international markets in mind to ensure the content is pivotable to these audiences when appropriate. Our goal is to be flexible and adaptable as situations continue to change and focus our marketing efforts on travellers who will rebound



CHRIS KELLY / NWT

quickly. In Appendix B, on page 66, you will find an overview of our strategies within our global markets on how we'll keep the dream of a visit to the Spectacular NWT alive for our international audience.

Without nurturing and supporting our relationships with key accounts in these important global destinations, the rebuild of tourism in the NWT will take much, much longer. NWT Tourism will continue to offer support for whatever these businesses need through online training, virtual FAM tours, packaging support, or just discussing new ideas. Our GSAs keep us extremely connected to the market demands and notify NWT Tourism of best practices for moving forward. We see many opportunities for expanded partnerships and look forward to developing them in these ever-changing times.

NWT Tourism will, with support from funding partners, continue to monitor resident sentiment in the territory to ensure our international marketing efforts accurately reflect the desire of communities to welcome visitors. This receptivity will be taken into consideration to help guide NWT Tourism when planning the development of content and integrated marketing campaigns.

A COMPETITIVE DIGITAL ENVIRONMENT-THE IMPORTANCE OF DIGITAL/TECHNOLOGY IN THE NEW NORMAL

It can be stated, without a doubt, that approaches to tourism and travel have changed. Technology will forever be a part of the travel experience going forward. Building a resilient sector means using technology to leverage our competitive advantages and keep our destination connected to and engaging the rest of Canada. There is an increasing need to connect emotionally with our target audience(s). In a crowded marketplace, the ability to meet people where they are (online, in a digital space) is required to stimulate the desire to visit. This relies on sound technological performance.

Building Resilience Through Technology

Destination Marketing Organizations (DMO's) have had to diversify their marketing efforts to include new technologies that bring the destination to the visitor instead of the visitor to the destination.

Virtual tours, video conferencing, and augmented reality (AR) quickly went from revolutionary to relevant.

Technology has and will continue to transform the experience economy. Visitors' technological expectations are at an all-time high, with destinations and operators working hard to meet and exceed those expectations. A web presence is now the minimum, with video, engaging photos and virtual tours becoming the expectation. If destinations and tourism suppliers do not deliver, the risk is that the customer will be lost to other destinations that offer timely and reliable information. In conjunction with this high level of technological demand, is an ever-growing ecosystem of digital touchpoints which create new opportunities for DMOs to connect with travellers at many stages throughout the visitor journey. NWTT and its members must stay competitive and meet visitors' expectations in this ever-changing digital landscape. These virtual experiences must endeavour to provide the emotional and sensory connection to our destination by augmenting reality, showcasing our destination, and building brand ambassadorship through user-generated content (UGC).

CONSIDERATIONS FOR MARKETING ACTIVITIES

Virtual Experiences

The mainstreaming of advanced in-home technology has brought cinema-like visuals, concert-quality audio and an event-like atmosphere into the home. Users begin virtual experiences with high-quality images and video content. Virtual travel experiences are becoming more commonplace in the tourism industry as technology continues to develop. Virtual tours and video content—both 2D and 360°—are being used by travellers to select destinations and engage in the planning process. Both accommodations and attractions are successfully utilizing virtual tour technology to attract and close potential visitation business—a trend that will likely continue post-pandemic.

360° Video, Virtual Reality (VR) and Augmented Reality (AR)

In a post-pandemic landscape where travellers will be cautious of future bookings and more calculated in which destinations they select, the closer the potential traveller can be brought to the real experience, the more likely it is that they will be able to make an informed purchase decision. For that reason, there is an increased interest in 360° virtual reality content along with augmented reality. DMOs can deliver 360° video or virtual reality via apps, web videos and social channels. Augmented

reality is different because it can be an effective way to make print media and advertising content more engaging and memorable for the potential client. AR can involve triggers built into print content that build a bridge from static pages to the users' device.

QR Codes

Evidence that technology is bridging the gaps is everywhere, and QR codes are a great example. Where the use of QR codes was before a conscious choice for marketers based on a 'digitally savvy' audience, using a smartphone to trigger an online experience with inbuilt cameras and QR codes is now the norm. An older demographic reading the Globe and Mail in print may now find themselves engaged and excited to take the journey from the printed page to digital media in their hand.

User-Generated Content (UGC)

Social media content is a powerful tool in the tourism industry for visitors to engage with destinations and their content. Posting and hashtagging powerful images and video content within DMO channels can allow consumers to engage with various experiences, share them with friends and interact with a destination in real-time like never before. Residents can become brand ambassadors, and DMO's can track and share content when given the opportunity. UGC can be shared and integrated into asset libraries once appropriate rights are obtained, increasing the ability of the DMO to have up-to-date quality photo and video assets.

Video Conferencing

Whether it be the normal business function of the DMO or a client wanting a bit more information from an operator, video conferencing is a trend that is prevalent in the new tourism landscape. Face-to-face meetings will remain an important component of doing business and, when face-to-face is not possible, telepresence will fill the void.

Mobile First

Although not a new trend, optimizing for mobile is more important than before. The smartphone has become the ideal companion for every traveller. Travellers can find information, read reviews and make purchases using their phones. Therefore, mobile is an important touchpoint for any operator who wants to reach potential customers. In 2021, mobile drove the most page views and traffic, even though many people were working from home. Thinking mobile-first allows DMOs to ensure a smooth customer journey from search to purchase.



Short-Form Video Content

Straightforward and ideal for reaching consumers with short attention spans, short-form video and ephemeral content are perfect for modernizing digital marketing efforts. Video is a passive and engaging way to consume information, and from trending TikTok videos to Instagram Reels to YouTube's continuous growth, people are consuming more of it.

Predictive Personalization

Personalization will be key for the post-pandemic customer experience. As borders open and consumers become inundated with information and brands clamouring for their attention, they will naturally tune out, especially when the information isn't relevant to them. This is where personalization comes into play, as it allows DMOs to show empathy and meet needs before they are expressed.

Web Analytics

Web analytics is the process of collecting, processing, and analyzing website data. It plays a key role in making business decisions and helping predict future behaviours. The Google Analytics platform is always the first choice for web analytics implementation but Google Analytics works by setting cookies on a user's browser when they visit a website that uses the platform. Due to many data privacy issues, a cookieless world is coming and Google is ready with a new platform called GA4, which offers modelling capabilities instead of cookies. GA4 also provides auto event tracking features, which saves a lot of development time.

First-Party Data

The digital advertising space is evolving and is putting user privacy at its epicentre. As a result, first-party data (owned data), as opposed to third-party (shared or acquired data) will be key in the future. First-party data will be vital to ensure marketing efforts are reaching targets and marketing is scaled in ways that meet people's expectations for data protection.

Search Engine Results

The layout and interface of search results pages are continually shifting especially over the past few years. In 2020, Google made 4,500 updates to Google Search. During the pandemic, Google started providing traffic to e-commerce sites and a small drop in traffic to tourist destinations was calculated. Google has just announced a Travel Insights web application which collects all the insights related to the world of travel and shares them with users. Many of Google's blogs clearly state that they are ready to promote tourism after the pandemic.

KEY TOURISM TRENDS

Indigenous and Cultural Tourism

Travellers to the NWT continue to seek opportunities to connect with Indigenous peoples and culture through authentic cultural tourism experiences. Considering its diverse representation of Indigenous culture, the NWT is firmly positioned to offer the traveller unique connections to Indigenous traditions, arts, food, and storytelling. Storytelling is integral to authentic Indigenous tourism experiences. Visual and interactive aspects are essential, but the interpretation is vital to truly connect with and understand Indigenous cultures. For this reason, marketing Indigenous tourism is best when it is marketing tourism 'by' Indigenous people, not 'about' Indigenous people.

Sharing an understanding of an Indigenous cultural experience's historical and present-day significance also distinguishes it as being authentic. Research shows that travellers who fall under the 'Authentic Experienter' Explorers Quotient (EQ), generally represent an older demographic looking to immerse themselves in local culture and connect with the people they meet. These travellers are drawn to the NWT's pristine nature and wilderness and aim to find 'the path less travelled.' They are eager to understand Indigenous culture but are also on a simultaneous journey of self-discovery. Travel for them needs to be meaningful, authentic and impact their well-being in a positive and lasting way.

Through partnerships with Destination Canada and the Indigenous Tourism Association of Canada (ITAC), NWTT will continue to provide the Authentic Experienter travel-seeker with the content and information to include the NWT in their future travel plans.

Culinary Tourism

In recent years, culinary tourism (or gastronomy) tourism has emerged as one of the key global marketing trends. Culinary tourism is one segment of the tourism industry that touches almost every visitor to every region. According to the Culinary Tourism Alliance, this type of tourism can be defined as:

"The pursuit of unique and memorable eating and drinking experiences that connect what is being grown and produced in an area to what is being prepared and enjoyed by locals. By combining travel with these edible experiences, culinary tourism offers both locals and tourists alike an authentic taste of place. It includes any tourism experience in which a person learns about, appreciates, consumes or indulges in food and drink that reflect the local cuisine, heritage or culture of a place."

DESTINATION CANADA / NWT

While the Northwest Territories currently has no dedicated marketing strategy solely focused on developing culinary tourism, this is an industry trend that NWT Tourism sees great potential in. To advance this, it will work with partners that include the Territorial and Indigenous Governments along with NWT operators and private businesses.

The Northwest Territories has many differentiating features compared to competitive destinations which, when adding culinary tourism into the mix, could enhance our overall tourism industry. These include the abundance of freshwater fish from lake to plate and wild foraged foods, incredible Indigenous culture, access to world-class outdoor leisure activities, the reliability of the Aurora Borealis and our diverse populations.

Luxury vs Legendary

Luxury travel has become one of the fastest-growing travel segments, outpacing most other tourism sectors. This is owed to a growth in disposable income and a rise in living standards in certain parts of the world. This market will enable the NWT to increase spending per visitor, contributing to a higher yield overall through spending. The luxury travel market has remained resilient, even in challenging economic times, and we expect these experiences to be highly sought after as people begin to travel again post-pandemic. These are affluent travellers who are less price-sensitive than other market groups and don't mind spending more to have a truly unique experience. According to a report by the ARC, the global luxury travel market should increase to \$8460 million by 2024,

compared to a spend of \$5200 million in 2019. In a report by Fodors Travel, many travellers are starting to view luxury travel differently. In fact, about half of survey respondents note that the definition of luxury travel has changed because of COVID-19. What used to be associated with luxury travel—like in-person, hands-on customer service—may not be what most luxury travellers are currently looking for in today's environment. Today's consumers say that personalized experiences (82%), cleanliness (81%), and privacy (79%) are the most desirable luxury amenities.

In summary, over the next decade with the growth of a strong middle class in many developed and developing countries, growth in luxury travel is projected to continue to outpace the growth of overall travel. By leading with our best products, the NWT can aim to facilitate the transition from the traditional definition of luxury to legendary. We can encourage visitors to interact with businesses that provide transformational experiences, and authentic human connections. Both legendary and luxury tourism requires solid, reliable infrastructure. Partnerships with the GNWT help us to share market demands for various infrastructure needs.

HVT's High-Value Travellers

The legendary experiences on offer in the NWT have always attracted a high-value traveller. According to Destination Canada, in the U.S. high-income consumer spending rebounded fully in March and is now up 11% above pre-COVID-19 levels and the savings rate among this demographic is 10 to 20%



higher now than before the pandemic. This is fueling more travel among the wealthy, who can afford to create and stay in secure bubbles and exclusive private groups even when surrounding places are at greater risk.

HVT's travel with purpose. The new understanding of luxury includes authentic experiences and full immersion in the local culture leading to personal growth and self-actualization. In line with industry partners, we will target an audience that has a higher-than-average income, travels more frequently and shows intentions of travelling within the next two years.

The Return of the Travel Advisor

The role of the travel trade is more important than ever. As trust in a destination becomes paramount for consumers, travel agents are playing a critical role in the recovery of the travel industry. They are a reliable source of information and provide welcome support to the exhausted person planning travel, especially with affluent travellers who have the luxury to pay for total travel planning services. More and more travellers indicate that they will use a travel organizer to arrange and customize their next trip instead of doing it themselves. While the role of online travel agencies cannot be ignored for short-haul and business travel, in particular, consumers will look to reconnect to a real person they can trust. Building relationships with these travel trade professionals will be a key to the success of the visitor economy in the NWT.

Wellness Tourism

Wellness tourism has long been an influential motivator for travellers, but has recently become a leading driver for travel. Given the wellness boom outside of the travel industry, it only makes sense that it would eventually become a hot topic within it as well. Recent research by Meghan Carty and Skift (2019), *Defining the New Era of Wellness Tourism*, reports that it has gained significant momentum in the last few years. Wellness travel can encompass several different components:

- Travel that supports a healthy lifestyle and improves personal well-being.
- Mindful travel, which includes immersing oneself entirely in the experience while, at the same time, showing respect for local culture and traditions.
- Conscious travel that strives to reduce the impact on the environment.

Wellness-minded tourism presents an opportunity for the NWT to attract travellers who, according to research, are higher-income earners who spend more on average than non-wellness travellers. They are in a 50+ demographic and have the time to participate fully. It is also important to state the difference between wellness tourism and medical tourism. Medical tourism involves people who travel to a different place to receive treatments for a disease or condition that is offered more affordably or at a higher quality than is available to them

at home. Wellness travel is about people taking trips to improve their well-being and includes spa experiences, yoga, sports, meditation, and wellness retreats. Many of these activities are already available in the NWT. However, there is a definite opening to expand these offerings and link them to other travel segments such as cultural experiences, that offer travellers a chance to challenge their beliefs and expand their thinking.

Inclusive Travel

Destination Canada and Travel Gay Canada have been working together to promote Canada as a travel destination of choice for LGBTQ2+ travellers. Some operators have seen success in marketing inclusion to attract visitors from a global market value of more than \$211 billion (US) in 2015. Beyond the more than 35 million international tourists that identify as part of the LGBTQ2+ community, destinations must build inclusive tourism economies that invite all visitors to settings and experiences where everyone feels included and welcome. Marketing activities must be mindful of promoting a feeling of inclusion. For example, images shared must cover a wide array of races, genders and settings that offer engaged users the opportunity to picture themselves in the destination.

Accessible Tourism

Accessible tourism is the ongoing focus in ensuring tourist destinations, products, and services are accessible to all people, regardless of their physical limitations, disabilities, age, or other factors. For people with physical disabilities, travelling can be more daunting than rewarding due to a lack of accessible tourist destinations. While the NWT has numerous challenges to offering accessible tourism to some of its remote and extreme locations, this is no barrier for some keen travellers who have the will to find experiences in a destination despite challenges they might have in accessing them. Operators must communicate through marketing to attract these groups when and where product offerings are suitable.

Online Travel Agencies (OTAs)

OTAs (Online Travel Agencies) refers to a travel agency whose primary presence is on digital channels, such as websites or apps, where consumers can research and book travel on their own without assistance from a traditional agent. Research shows that OTAs are often the first stop for consumers to purchase travel packages, and also search for destination options and ideas. They are an important part of the travel trade channel, with some of the largest global OTAs who control over 95% of the market including Expedia, Booking.com, TripAdvisor, and Trip.com. OTAs offer products for many different

destinations, but focus mainly on hotels, flights and package options including car rentals. In larger centres, experiences and activities can also be booked. They rely heavily on technology and product innovation which, when combined with innovative marketing and analytics, help effectively target, attract and retain customers. These sites offer value to consumers at all stages of the buying process including problem/need recognition, information search, evaluation of alternative options, price comparisons and post-purchase behaviour. Post COVID-19, we can expect OTAs to continue with competitive pricing, simplifying cancellation and payment policies and placing an emphasis on cleanliness of products/accommodations.

NWT Tourism sees OTAs as an area to help our suppliers and destination overall build capacity. Getting SMEs onto OTA platforms, along with our accommodation options and flight information, will help convert even more consumers into booking a trip to the NWT. Through partnerships with Destination Canada, NWT Tourism has plans to further develop our online presence on Expedia, the flagship brand of Expedia Group. Expedia Group includes 200 travel booking websites serving 75 countries in 35 languages and hosts over 600 million monthly website visits. With this partnership, NWT Tourism gains the ability to have access to measurements of impacts and returns on investments into the platform, which ensures we're making informed marketing decisions.

Bleisure

Travellers who combine leisure activities while travelling for business are known as bleisure travellers. The trend is one hotel operators, DMOs and conference bureaus should not ignore. The bleisure market is expected to grow in significance post-pandemic as it is predicted that business travellers will be among the first travellers to re-enter the marketplace. Bleisure travel was initially driven by millennials entering the workforce. With more focus on work/life balance, millennials are highly likely to want to experience something outside the hotel or conference space. Older demographics are now embracing this trend and looking to balance business trips with tourism experiences, particularly wellness and culinary. Bleisure travellers are looking to experience destinations and, if given the opportunity, may extend trips to include tourism offerings so long as the destination is viewed as exciting or unique. With its unique products and vast, beautiful landscape, the NWT is in a perfect position to take advantage of this trend with partnerships between local operators and hotel groups. Platforms such as Expedia and other OTAs can also enable more engagement from this sector.



ANGELA GZOWSKI / NWT

Sports Tourism

The sports tourism sector is an essential contributor to the overall Canadian tourism economy. According to data released by the Canadian Sports Tourism Alliance (CSTA), in 2018 Canada reached a historic high in sports tourism spending, with a total expenditure of \$6.8 billion. With capacity and well-maintained modern facilities, the NWT, is positioned to become a player in this niche sector on the national stage. With visitation suspended and recovery of international travel to pre-pandemic levels still unknown, sports tourism can be a significant element in the recovery effort, beginning with intra-territorial and eventually domestic events once large gathering restrictions are lifted or eased. The NWT's uniqueness, attractions, infrastructure, and relative isolation, position our Territory well to realize the economic and social benefits of sports tourism in the post-pandemic era. The regional sporting bodies of the NWT are well-positioned to offer exciting hosting opportunities or 'sports tourism'.

Wild For Wilderness

An emerging trend in the travel sector post-pandemic is the desire to feel connected to nature. There is a real desire from Canadian travellers to immerse themselves in nature to reconnect. It speaks to pent-up demand after lockdowns and disconnection. The NWT, which is full of wide-open spaces, is well-positioned to provide offerings to the domestic audience who are interested in wilderness adventures of varying degrees.

The NWT is a place that is surrounded by, and closely connected to, wilderness and the ability to connect with nature. Being present in the NWT has the ability to inspire wellness and awe in our visitors.

The wide-open spaces of Canada's North are unknown to many Canadians. NWT is focused on destination awareness to help remove perceived barriers that Canadians may have, due to a lack of knowledge about Canada's North. With well-maintained National and Territorial Parks, intrepid paddle adventures with experienced outfitters, remote lodges, and road trips to the top of the world, the NWT's wild wilderness is what people are looking for. Many of them just don't know it yet.

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

In a time of global uncertainty and in working toward the industry's resilient recovery, the NWT tourism industry must focus on its inherent strengths and find opportunities to build. Now is the time to address areas of weakness and mitigate threats to the tourism industry's post-pandemic recovery.

STRENGTHS

The Spectacular Brand

The brand developed by NWT Tourism and its partners is literally spectacular. It resonates with NWT residents, visitors, north-facing audiences and new ones. The number of operators, packages and tourism products has grown over the years and, under the Spectacular NWT brand, our promise is a powerful one.

NWT Tourism has been established for more than 20 years. It has been, throughout its history, a learning and growing organization. Its success in growing the market has been a result of solid decision-making supported by marketing data. The organization has a balance of seasoned and fresh perspectives and strong teamwork among its board, staff, agency of record and contractors. Both its size and its structure makes it agile, flexible, and adaptable.

The Spectacular brand is a genuine one that represents the NWT with authentic, unique storytelling and content.

Natural Assets

The NWT has significant natural assets, including the world's best Aurora, the Midnight Sun, pristine lakes and rivers, mountains, barrenlands, environment and wildlife. In a world that increasingly values pristine environments and sustainable tourism, the NWT offers first-rate natural products. The NWT has been supported scientifically as the best Aurora-viewing destination in the world. Indeed, virtually all of our natural assets are recognized as world-class, from sport fishing to parks.

Wide-open Spaces

In addition to having substantial natural assets, the NWT is a unique destination. Scarcely populated and remote, the uncrowded wilderness of the North has always attracted people longing for wide-open spaces. The NWT is often perceived as an authentic and quirky destination still full of friendly pioneer spirit. It continues to be sought after as a once-in-a-lifetime, "bucket list" destination where people can escape into the wilderness and connect with the "true-North" culture and landscape. As the travel sector begins to emerge, consumers will be looking to participate in nature-based activities in smaller group settings. The vast expanse of the NWT provides the opportunity for visitors to experience a variety of iconic wilderness experiences in a setting that is truly uncrowded.

We Are More Connected to Industry Partners

Relationships have always been important and a strength on which we rely for success. NWTT's network of members across the regions has never been more important as a collective voice and is more important than ever. The growth of the tourism industry relies on strong cooperation with like-minded partners. NWT Tourism enjoys a strong and durable relationship founded on trust and respect with the Government of the Northwest Territories, which provides core funding. It also works in close partnership with other organizations pursuing tourism, including the City of Yellowknife, the Indigenous Tourism Association of Canada, Parks Canada, CanNor, Destination Canada, and the cooperative work with the tourism industry. As in-person meetings are still limited as a result of the COVID-19 pandemic, we are utilizing video conferencing to stay connected to our key partners as required.



Digital Innovation

NWT Tourism has embraced innovative digital marketing, keeping pace with how travellers research, plan and book travel. While we have referred to this strength in years past, we truly go from strength to strength with data-driven, consumer-centric marketing based on sound knowledge of our destination. With over 85,000 mentions, the hashtag #SpectacularNWT is used widely by residents and travellers alike, and user-generated content continues to populate NWT social media channels. The Spectacular NWT website is diverse and robust and, while always offering opportunities for improvement, it is comparable on an international DMO stage. The content strategy has enabled some fantastic success in search engine optimization (SEO) and search engine marketing (SEM) – a strength we will continue to build on.

WEAKNESSES

Access to the NWT

Although air and road access has continued to improve over time, the cost of travel to the NWT continues to be high, especially relative to other competing destinations. This cost barrier is particularly the case with a journey beyond Yellowknife into more remote regions of the Northwest Territories. The NWT as a destination also battles with this perception. Even in instances where prices are not cost-prohibitive, domestic consumers' perception is that the price is high. The existing problem of access to the NWT provides a challenging place from which to begin a rebuild. This threat is detailed further below.

Availability of Tourism Product/Inventory

Many operators are carrying over their bookings from the last two years. Pent-up demand due to the inaccessibility of visitors, coupled with large financial losses, have left many operators in a challenging position. In short, while there is a huge need for access, much of the tourism inventory will be taken quickly if it's not already booked. This poses a challenge for marketing but, more importantly, for the cash flow and viability of operators with many not expecting any real revenue until 2023. Communication directly with members will be key to ensure the right tourism products are being marketed and that marketing can support both the development of new business and long-term bookings.

Lack of Tourism Infrastructure, Products and Services

The NWT has limited products, services and activities available to visitors, particularly outside of Yellowknife. There are only a small number of trade-ready/experienced operators. Many opportunities, such as community cultural experiences, wellness, luxury Aurora accommodation and culinary experiences, are not being offered or are not yet well-developed for tourism consumers. Facilities and accommodations for meetings, conferences, and events are limited outside of the capital city. Additionally, there is a shortage of frontline workers in the hospitality industry. Add to this the pandemic's impact on the tourism economy, and it becomes clear that, for tourism to recover, well-planned destination development projects and funding support will be essential.

Limited Digital Presence of NWT Suppliers

Many of our Small Medium Enterprises (SMEs) are owner/operated businesses whose strength lies in delivering legendary tourism experiences. Rather than spending their time on their digital presence, time is spent working in their business. In a digital world, these legendary experiences need to be found to be enjoyed. There is a real opportunity to have a much stronger digital presence. COVID-19 has catalyzed the adoption of technologies and customers digitization and adoption of technology has accelerated. It is not sufficient to be digitally literate. The majority of operators must now be capable of connecting digitally with the right customer to generate leads and convert sales.

Lack of Human Resources

The tourism industry has faced huge job losses and COVID-19 has left many of the tourism workforce questioning the security of a career in the tourism industry. Hiring required talent has always been a challenge for many businesses in the north, long before the job losses brought about by the pandemic. This is not a new problem, but may be one of the largest challenges for the recovery of the industry. The great resignation of 2021, which has seen many workers opt out of unsupportive workplaces, may also have far-reaching effects that will add pressure to an already weak area of the NWT economy.

While many of the above weaknesses are out of the control of NWT Tourism's marketing team and mandate, they are areas that warrant careful monitoring. There may be opportunities for marketing to address and share insight into these problems in an effort to support solutions.



JULIEN SCHRODER / NWTT

OPPORTUNITIES

Destination Awareness

South of 60 the knowledge of north of 60 quickly declines. This now provides a unique opportunity for our Canadian audiences to discover the unknown. Most Canadians are not 'aware' of the NWT (EnviroNics Data in 2019/20). Many Canadians have no idea of the NWT's geographic location and its landscapes, lakes, rivers, and mountains are widely unknown. While some people feel skeptical to travel abroad, discovering the unknown lands within the Canadian border will have a renewed appeal for many. It remains true that marketing efforts must work to break the stigma around the cold, and beliefs about longer travel times. However, these hesitations will act as platforms from which to launch the journey of discovery.

Spectacular Brand Ambassadors

NWT residents present the best opportunity for the Spectacular NWT brand. While we have always regarded the chance to have residents spread the word as one of our best marketing tools, there is a renewed possibility for the best imaginable brand ambassadors to buy-in. Building awareness within the NWT of the visitor economy is an obvious first step. Understanding the tourism industry's potential contribution to sustainable economic growth may help residents realize

that the spectacular natural assets we know and love can contribute to our economy while remaining intact. We love the Spectacular NWT and NWTT aims to educate ambassadors on its true meaning with hopes to spread the word further.

Leveraging Partnerships

While partnerships are a core strength, we can also build on the above opportunity and create more ambassadors from new and existing business partnerships. By connecting with community groups, residents and various stakeholders such as sporting groups, NWTT can build awareness of the opportunities available to all NWT residents through tourism. Leveraging these new partnerships, if well-developed can help further build a new community of ambassadors for tourism in the NWT. If local sports groups, for example, see the potential of a small (or larger) sporting event to stimulate the local economy then they may get behind tourism and help build positive sentiment for the tourism value proposition.

Our Customers

Now that we know our customers better, we can have a better conversation. While building relationships with our consumers is not a new opportunity, the learning from the research, as well as a strengthened capacity to meet our audience where they are, presents an exciting opportunity. Using newsletters,

social media and other well-planned marketing activities, NWTT can connect with potential High-Value Travellers with a targeted and personalized message to engage them with our destination and create a desire to visit.

New Trends, New Products, New Markets

Between Francophone travellers, new markets in Mexico and the UK, yoga retreats, wellness travel and so much more, the opportunities are endless. However, the post-pandemic landscape will offer more uncertainty than ever. NWT Tourism is constantly assessing opportunities and works closely with partners to gauge ROI and risk/reward in each case. While some opportunities such as marketing first-mover 'post-pandemic' getaways with a short lead-in time to the Edmonton audience seem like good choice others, such as the potential for the UK as a recovery market, require more detailed analysis.

Indigenous Experiences

With the pandemic shifting travel domestically in 2020 and 2021, there is a renewed focus on Canadian experiences that Indigenous tourism businesses can capitalize on. According to a study by Insignia Research, in partnership with ITAC, Indigenous tourism operators can significantly grow their Canadian traveller base. With a renewed desire for escapism and trips that are closer to home, coupled with the demand for authentic and genuine experiences that provide a deep connection to place, NWT Indigenous tourism operators are well-poised to welcome visitors. The inherent nature of Indigenous culture in the NWT is offered authentically through many of our experiences.

Road Trips and Highlighting Regional Strengths

Surprisingly, almost a quarter of visitors to the NWT come via road, and NWT Tourism has undergone extensive digital development in the past year to further showcase the regions and communities of the NWT connected via road. In addition, new infrastructure projects can offer increased visitor access and visitor economy opportunities for communities of the NWT. The new Tłıchq all-season highway is an example that will provide future tourism opportunities when the time is right. While recreational vehicle (RV) infrastructure is needed to capitalize on the core RV market, niche 'wilderness' RV travellers seek intrepid road trip opportunities. Regardless, destination RV parking areas and welcoming tourism resources for road travel will be vital post-COVID-19 and will need to include fuel, parks, supplies, wayfinding strategies and highways infrastructure.

There is an opportunity to highlight regional strengths, connect regions to the right consumers, and build a brand narrative around unique regional offerings. The natural resources, outstanding cultural and wilderness experiences, and spectacular waterways are areas where regions can highlight the uniqueness of each destination. Most importantly, as the industry recovers, there will be an opportunity to work across all five regions to encourage inter-territorial travel, increasing resident support for tourism and brand ambassadorship.

National and Territorial Parks

The natural beauty of the NWT is witnessed in many of the designated parks across the Territory. While Parks Canada works with NWTT to drive awareness of the spectacular landscapes of the NWT, the role of the Spectacular NWT brand can be strengthened to support awareness of these parks in particular to road visitors. Digital website tools, engaging content, social media stories and video content are some of the core ways in which NWTT aims to better share the protected landscapes of the NWT.

Website and Video - Maximize Online Experience

We know an increasing proportion of people around the world are connected via mobile devices and laptops at home. With the pandemic, people spent more time indoors and have become much more 'connected.' Online is where visitors do their research, plan, and purchase their travel. NWT Tourism has an opportunity to increase its presence online and connect with target markets digitally through social media, websites, and apps. The digitization of the world also provides an opportunity for NWT Tourism to mine user data to better target its messages and hone its reach with those most interested in our destination.

Video Storytelling

While NWT Tourism has created some amazing video content to date, there is room for improvement. The world of visual media provides opportunities to engage our audience and move them down the sales funnel from general awareness of the NWT to a desire to travel here. Watch time on Youtube has grown over 127% in Canada over the last four years with an average video length of 11 minutes. During the pandemic, NWT Tourism built out our video library and created a strategy to launch more engaging and better-performing videos. Over seventy percent of Canadian web users use Youtube, and video is taking centre stage in many of NWT Tourism's campaigns. We want to connect our audience to the NWT - our people, culture, landscapes and the members who share these experiences with visitors.

The NWTT Co-op Program

NWT Tourism's annual cooperative sales program paves the way for collaborative marketing with our members and regional partners. With input from industry stakeholders, the co-op program is developed to deliver maximum value for members to better position and promote their business. From social media content creation to physical marketing assets, online digital advertising and video content creation, the co-op program provides NWTT with an opportunity to encourage partnership and collective creativity providing mutually beneficial outcomes with our partners.

MCIT Opportunities

There is an opportunity for communities, accommodation providers, lodges, and established tourism businesses across the NWT to diversify their core target audience and attract new and unique groups for the Meetings, Conferences, Conventions and Incentive Travel channel. NWT Tourism and the NWT Conference Bureau continue to build partnerships in all regions to understand regional strengths and capabilities so as to apply those strengths to our marketing efforts and bid submission requests.

Domestic Travel Trade

The domestic travel trade market will be different post-pandemic. Consumers are already reliant on OTAs however, the recovery of the tourism ecosystem will present an opportunity for the development of new travel trade programs across the country. NWTT sees an opportunity to develop new relationships while strengthening existing ones for the travel trade channel. Providing travel agents with information, training sessions, sales calls, and regular updates, NWTT offers agents the opportunity to sell our destination to Canadians more effectively.

THREATS

Welcomeness of Residents

The willingness of residents to welcome visitors to their communities will be a threat to the recovery of tourism. Prior to the pandemic, the sentiment of NWT residents toward visitors was strained at times. While we are currently seeing that the perception of tourism's value to the economy of the NWT is high, many communities are not comfortable with non-residents coming to visit just yet. While much of the work will be upon operators to ensure tours are welcome in the areas they frequent, NWT Tourism has a role in helping residents understand why people want to visit and share an insight into the positive benefits tourism brings.

The Tourism Ecosystem - Travel Restrictions

Pre-COVID-19, the NWT had reliable air transportation routes, notably through Vancouver, Calgary, and Edmonton, making the NWT easily accessible to travellers. This extended to international markets as routes offered international visitors convenient connections to our destination. Post-pandemic, this ecosystem is at risk. Reconnecting markets may take time, and the NWT's ability to access visitors could be significantly hindered for a prolonged period. Travel to the NWT, and especially to regions beyond Yellowknife, is costly. These costs are subject to change with so as to in the Canadian exchange rate. Fewer travellers, testing requirements and social distancing precautions have also influenced rising travel costs. At the time of writing, direct Ottawa and Toronto flights are set to begin in May. Aligning marketing efforts with this will be key.

HANS PFAFF / NWTT





The Tourism Ecosystem - Products and Visitor Services

While the availability of products was outlined as a weakness above, NWT Tourism also recognizes the threat of losing further tourism product and visitor services due to prolonged pandemic-related hardships. NWT Members are facing unprecedented challenges in keeping businesses afloat and the long-term effects on our product offering and related visitor services is a serious threat. An existing lack of infrastructure and the strain on visitor centres to remain in operation, means the NWT's ability to provide adequate and essential visitor services is under threat. Marketing efforts must help manage the expectations of potential visitors, while still promoting the destination.

Labor and Skills Shortage

The global tourism industry is struggling toward recovery as labor shortages, due to mass COVID-19 layoffs, has seen a tremendous loss of skilled workers to other, more 'secure' sectors. The NWT will be no exception. In an already challenging labor market, the tourism industry of the NWT faces massive challenges in keeping positions staffed. NWT Tourism is working with TIAC and Tourism HR Canada, but this issue is Canada-wide. Businesses will need to work together to promote tourism as a positive, rewarding and sustainable sector in which the NWT needs to continue to invest. Marketing efforts can help to manage visitor expectations, while businesses recover and work toward offering a higher quality experience.

An Uncertain and Changing Climate

The very thing that is one of our greatest assets — our natural environment — is also a potential threat to tourism. Changes to our natural assets due to climate change, weather-related travel issues, and even the enduring perception of the NWT as having an unfavourable climate for travel, could affect the tourism industry's recovery. We have seen floods, fire, and unprecedented seasonal weather that could shift seasons perhaps impacting things like the Aurora due to cloud cover. Recording these shifts, paying close attention and having risk management plans for the impacts on tourism, will help us market in more effective ways.

First Mover Advantages

While the pandemic has helped solidify relationships across jurisdictions, building a 'team Canada' approach and strengthening ties within the travel industry; we remain in a highly competitive landscape. Willingness to travel may see a smaller 'pie' from which to attract travellers, both domestic and eventually international. We have seen many competitors from the Yukon to Iceland emerge with strong marketing campaigns and calls to action, while our borders have remained restricted. Ease of travel and accessibility will give a head start to those destinations that market what travellers are looking for and enable destinations to take ownership of unique product offerings.

Domestic Competition

Not only is NWT Tourism competing with other international jurisdictions for travellers, but it is also competing with other Canadian provinces and territories — with much larger marketing budgets — for the same traveller. Despite strong support from the Government of the Northwest Territories, CanNor and other partners, NWT Tourism has fewer financial and human resources than is optimal to maximize tourism's contribution to the NWT economy. NWT Tourism's limited budget is now facing an increasingly competitive environment, as other Canadian jurisdictions are working to attract the same target markets. There is increased domestic competition for fishing, paddling, authentic cultural experiences, touring, outdoor travel, and Northern Lights viewing.

Long COVID-19

There is growing acceptance that COVID-19 will become a long-term endemic driving unprecedented uncertainty, constraints, and competition within the industry. It is likely most travellers will gravitate toward destinations that are perceived to be clean, healthy, and safe. Our destination's ability to include these attributes, where possible, in marketing efforts will be important to attract visitors to the NWT. The long-term threat of health restrictions on travel will require diligent monitoring of the global environment so that marketing efforts are timely and effective. We have a great team that's up to the challenge ahead and retain a positive outlook considering the threats we face.



TARGETING OUR MARKETS

NWT Tourism reviews target markets annually to ensure marketing continues to support the tourism economy and tourism revenue generation for the territory. Our target audience continues to shift and change, as do the geopolitical effects on global tourism. COVID-19 necessitated a quick shift in our target audience to focus on residents of the NWT. We are continuing to update and research the best target markets in the post-post-COVID-19 world.

Residents are now a fundamental component of our target marketing both in the short and long term. This audience will help market NWT's core product offerings to appeal to markets outside of the territory. As recovery progresses, visiting friends and relatives are among the main returning visitors from outside the territory. Local NWT marketing efforts will build brand ambassadorship and push positive tourism messages to a Canadian audience that begins to travel again. It is essential that local marketing focuses on scalability while keeping resident feelings towards visitors and health restrictions in mind.

NWT Tourism uses website analytics to monitor engaged and emerging audiences online. We match this with postal code data, collected from traveller and visitor guide requests to focus marketing activities on the ideal target audience - those that are likely to plan a visit to the NWT. Until research on the post-pandemic traveller is available, NWTT will use this analytical data to target our marketing activities. While pre-pandemic visitors tended to be 50 plus, a broader audience is a logical choice as NWT aims to dial into the functional (business travellers) and emotional marketing of target audiences in target markets. We are broadly targeting Canadians - aged 35 - 65 (not just English-speakers). Research will need to be conducted regularly post-pandemic to ascertain the most viable audience based on intent to travel and market access.

The data we have collected helps us understand the psychographics of our target audience, their motivations and their media habits, which helps ensure our marketing decisions are data driven. In Appendix B, page 66, are the results of the postal code research that provides insights into our target audience.

THE PEOPLE APPROACH – PSYCHOGRAPHICS AND MARKET SEGMENTS

Since 2006/07, Destination Canada (DC) has used a proprietary psychographic segmentation system based on travel values, called Explorer Quotient (EQ), for its brand Canada marketing efforts and as a licensed research product for destination marketing organizations at the provincial and territorial level. EQ 2.0, launched in 2018, offers access to more data, allowing for a more actionable travel values-based segmentation for today's digital marketers. EQ segmentation data covers social values, demographics, media preferences, and more.

We are targeting three primary EQ segments: Personal History Explorers, Authentic Experiencers and Cultural Explorers. As travellers, Personal History Explorers are primarily defined by their desire to connect to their cultural roots and travel in comfort, style and security. The Authentic Experiencer is a more learned, understated traveller. Travel is not their only interest in life, but they certainly appreciate it when they go. They prefer to do their own thing while at a destination, having control over what they see and when they see it. Authentic Experiencers are looking for authentic, tangible engagement with destinations they visit, and have a particular interest in understanding the history of the places they visit. Cultural Explorers are avid travellers who value learning and discovery while travelling. They don't want to feel like a "tourist," preferring just to blend in and have the most authentic experience possible rather than being confined to group tours and schedules. Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover, and immerse themselves in the culture, people and settings of the places they visit.

AUDIENCE SEGMENTATION

While EQ segments help to build the emotional 'feeling' of marketing activities, aiding with content development and understanding what connects our destination to the right audience, today's data-driven marketing world requires a level of accuracy that targets these audiences and meets them where they are. This means they need to find us on the right social channels, in the most probable newspaper, during their favorite TV show, on the commute to work, or while they listen to their favorite sports team on the radio.

Understanding audience needs is essential and, while the core call-to-action may be the same across audiences, what motivates those audiences to take interest, and then take action, will vary. Audience personas are one way in which we can conceptualize specific and similar groups in our audiences, making it easier to develop messaging specific to them, their motivations, and their interests.

The personas captured for NWT Tourism were constructed using Canadian population data. The Environics PRIZM system - which collects census data as the base and then enhances it with dozens of other authoritative data sources - classifies every Canadian household into one of 68 segments that reflect current demographics, lifestyles and values.

Deeper than demographic insights, PRIZM gives us the ability to understand life cycle stages, psychographics, and values, which all help create a more complete picture of audiences.

Using historic postal code data collected from visitors to the NWT, NWT Tourism developed segments with high visitation rates to target those who are most likely to visit the NWT. Similar segments were then clustered together to create target groups. Appendix B offers some high level insight into the compiled data analysis and not only gives insights into their demographics, but also their key tourism activities, accommodation preferences, media habits, and more.

KEEPING CONNECTED

Geographic markets are the areas we send our messages to and represent the areas we hope to attract visitors to the NWT from. NWT selects geographic markets based on several criteria. For a domestic audience, this is based on market size, average household income, engagement and access to the NWT. For international markets, we work with partners such as Destination Canada to assess the number of visitors to Canada and the NWT, the total visitor spend, average spend per traveller, and the match between the products that visitors from a particular geographic region are looking for and those available in the NWT. For more information on these markets and target audiences refer to our target market Appendix C. We also consider the strength of a market economy, current geopolitical status, air capacity, and other factors that may affect travel ease and interest. There are lots of variables in our target markets and working with partners to track changes in the markets is a key activity to welcoming visitors back to the the NWT.



ANGELA GZOWSKI / NWT

COVID-19 IMPACT

Due to COVID-19, and related travel restrictions, the NWT was effectively closed to visitors in March 2020. Many of our communities are worried about welcoming non-residents. We are faced with a rapidly changing and challenging situation that requires monitoring the political, environmental, social, and technological environments accordingly. The summer of 2020 saw local NWT residents out and active with local staycations. While this was positive, the staycation market simply could not replace tourism visitation and revenues usually seen from outside the territory. In 2021 resident engagement declined as fully vaccinated travellers were able to travel outside of the NWT. Ultimately, tourism has been devastated, and the tourism industry is focused on visitors returning when border restrictions ease. As the territory looks toward the next phase in tourism recovery marketing, it must focus on the first available

economic opportunities. We know family and friends will come to visit when this is possible and we know that business will eventually resume in the new normal, so we are focusing on staying connected. The recovery framework guided us through the response to COVID-19 and recovery actions. We may move backwards and forwards through this model due to health, safety, social, economic, and political factors.



2022/23 MARKETING PLAN

The Marketing Plan guides activities and highlights some of the strategies and tactics NWTT will use to achieve its goals and objectives. The plan acts as a resource on which to rely when moving through the calendar of marketing activities. This plan can be shared to show partners planned actions toward marketing the NWT. In 2020/21, NWTT pivoted on the marketing plan due to COVID-19, but the overall goal and objectives remained. NWTT must plan to be flexible in the face of a rapidly changing marketing environment.

GOAL, OBJECTIVES AND MILESTONES

The goal is the ultimate outcome established by the Board of Directors. It guides marketing activity, the setting of objectives and the marketing milestones NWTT strives towards. While the industry is working towards recovery, focusing on the tourism industry's 'growth' implies growth from near zero, so as to recover and eventually build resiliency. The goal remains true as people look toward the eventual growth of tourism into something that is once again resilient and sustainable.

GOAL

To expand the NWT tourism industry and the economic benefits to participants in the industry and to contribute to the economic development of the NWT.

OBJECTIVES

At the core of any plan is a clear list of strategic marketing objectives. Objectives outline the marketing team's intentions, provide clear direction for team members to follow, and offer partners information to review and support. Our objectives signal when progress is made toward the primary goal. Objectives are linked to Milestones and Key Performance Indicators KPIs.

As there is a significant impact on the GNWT's ability to gather visitor data and other metrics, some objectives will need to be ambiguous depending on the situation and will be monitored closely as the year continues. Objectives outlined below are discussed throughout the strategy and tactics and, although some of these objectives may be high level, they drive NWTT's efforts. NWT Tourism will aim to achieve the following eight objectives:

1. **Grow tourism visitation and tourism-related expenditure in the NWT.**
2. **Expand destination and brand awareness.**
3. **Encourage regional distribution of tourism benefits.**
4. **Expand awareness of Indigenous experiences within the NWT.**
5. **Promote the NWT as a Meetings, Conferences, and Incentive Travel (MCIT) destination.**
6. **Ensure effectiveness in media marketing channels - earned, paid, shared, owned.**
7. **Build resilience in travel trade networks.**
8. **Ensure marketing in all channels is based on relevant data.**

MARKETING MILESTONES

Milestones measure interim steps toward the achievement of the objectives. While NWTT's marketing team is always tracking key performance indicators KPIs, as the gauges to confirm success, milestones are the interim 'goals' that signal work toward an objective is on track. Milestones can change in response to fluctuations in the marketing environment. Some of the milestones and KPIs that NWTT will work toward in the marketing plan include:

- Establishing benchmarks for visitation and expenditure in partnership with the GNWT post-COVID-19
- Maintain brand awareness for Spectacular NWT in key markets and expand secondary markets.
- Measure and maintain audience quality and engagement rates.
- Measure and build owned content engagement.
- Rebuild earned media to value.
- Monitor and track results for paid media KPIs.
- Increase social media engagement and build followers on new platforms.
- Video engagement growth.
- Establish converting website landing content for all primary markets.

MARKETING CHANNELS

NWT Tourism approaches our marketing through four key distribution channels: direct-to-consumer, travel trade, media, and the Meetings, Conventions and Incentive Travel (MCIT) sector.

Consumer

Arguably the most important channel is direct-to consumer. A destination marketing organization aims to build awareness of, and attract visitors to, the destination. In turn, it develops local economies with this increase in tourism. Engaging people through marketing and developing an interest in the NWT, consumer marketing aims to create a desire to visit the NWT. NWT Tourism does this through digital marketing and an 'always on' strategy to engage potential visitors. Marketing efforts focus on content marketing across a variety of channels to reach the consumer. Content will either deliver facts, interesting reads, emotional content, a link to a member listing, a jump-off to member's websites, booking agents, or even a phone call.

The consumer distribution channel remains the largest focus of our marketing efforts. The primary consumer target is potential visitors from throughout Canada, and the United States. Now more than ever, the intention is to develop brand recognition and destination awareness.

This begins at home with NWT residents. We aim to build the brand ambassadorship and pride in sharing the NWT with visitors when the time is right. We need to encourage storytellers to share the spectacular NWT with friends, family and work colleagues. Now is the time to connect emotionally and welcome guests back year after year, encouraging them to build some of their best memories in the Northwest Territories. It's a place brimming with adventure and memory-making opportunities. We tell them this directly through consumer marketing.

Media

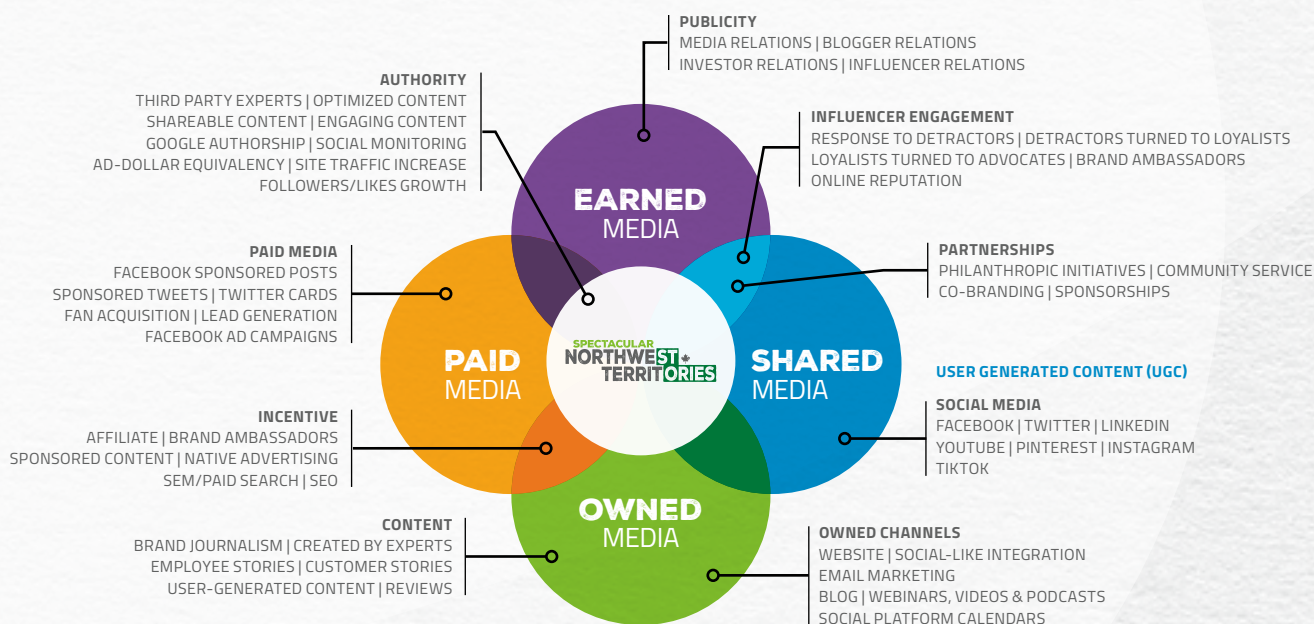
One of the most effective ways to increase destination awareness is through paid, earned, and owned media channels. While NWTT has placed a high priority on 'travel media' in the past, NWTT is placing a higher priority on approaching the media in new and more dynamic ways.

Owned media is when we create content and share it with our consumers organically on unpaid channels This includes stories on the Spectacular NWT website and original content on our social media channels.

Earned media is when content about the destination has been created or shared by a third-party site, a travel or news publication, or the public.

Often earned media comes from traditional and online media that specialize in reporting on travel and destinations. NWTT builds relationships with travel media through travel media marketplaces organized by Destination Canada, and by matching qualified travel media to products their audiences are interested in following. Any mentions, shares, re-posts, or reviews on our social channels would also be considered earned media. Receiving earned media coverage is the most cost-effective way to expand reach and general awareness for a destination.

While travel media plays a crucial role in promoting and selling tourism destinations, COVID-19 had an impact on familiarization (FAM) tours - an essential factor in obtaining travel media coverage. The media coverage by travel writers, bloggers and broadcast journalists enables a greater reach than most other marketing activities. Consumers trust earned media more than paid advertising. It provides a voice of authenticity with readers because it is genuine, and the destination is not controlling the message. Earned media is where the destination earns the emotional connection that talented writers offer to a reader. However, the destination has no control over what is said or when it will be published.



ADAPTED FROM: GINI DIETRICH, SPINSUCKS ©



COREY MYERS / NWTT

The importance of paid media has grown while travel restrictions are in place, and NWTT has taken a holistic approach to media that leverages owned and locally earned media, paying placement and promotion.

Paid media is when we pay for our content to be promoted to a broader audience that we may not have access to organically. For example, paid media would include any advertising or advertorials, as well as any boosted social posts. The benefit of paid media is that the destination controls the message, the target audience, and the duration for which the piece will be promoted. The downside of paid media is that it consistently costs more than earned media and is less trusted by the consumer. Each channel works hand in hand and is very important for maximizing media coverage. By combining all three channels and using social media's connectivity, we can amplify our reach and destination awareness more effectively. This year our objective will be to maintain destination awareness through these three media channels and work toward attaining earned media values achieved pre-pandemic as FAM tours resume and earned media recovers.

Travel Trade

Without travel trade, travel stops. The travel ecosystem is an intriguing web of experiences, travel agents, online travel Agents (OTAs), booking agents, wholesale agents, airlines, hotels and many more. The 'travel trade' is the intermediary and liaison organizations between travellers and tourism suppliers. These organizations include tour operators, receptive tour operators (RTOs), wholesalers and travel agents. These all promote who all promote and sell to North American and overseas markets and create an essential link between tourism suppliers and potential customers.

The travel trade has played a vital role in marketing the NWT to our key international marketplaces where direct marketing

to the consumer is cost-prohibitive and destination awareness is low. As the tourism industry recovers, there will be a need to rebuild and connect with the domestic travel trade. NWTT benefits from working with the travel trade as it has established sales networks and a loyal client base. Our GSAs act as an extension in their respective markets to ensure awareness is high and they have developed long-standing relationships with key accounts. Our marketing efforts to countries outside the United States and Canada rely heavily on the travel trade distribution channel.

As part of the overall NWTT travel trade strategy, we will attend key travel trade marketplaces, make sales calls and present product training in-person or through webinars. We also provide the the travel trade with regular updates on export ready products in the NWT, host travel trade professionals on familiarization (FAM) tours (both in-person and virtually where applicable) and establish cooperative marketing partnerships with key trade accounts.

Meetings, Conventions and Incentive Travel (MCIT)

Different from the other three channels, MCIT isn't a way to connect to consumers; it's a different type of demographic altogether. This channel is comprised of those who broker and organize business and convention travel. NWTT's Conference Bureau manages this channel and works with local businesses in the NWT to gather information to respond to requests for proposals (RFPs) on behalf of the region. Marketing efforts focus on attracting mid to small-sized meetings and conferences and on promoting the NWT to incentive companies looking for innovative ways to reward their top clients and employees. The NWT Conference Bureau customarily attends MCIT shows and events (both virtually and face-to-face), hosts site visits for planners, and helps local partners submit bids and proposals to host meetings, conferences, and events in the NWT. The NWT Conference Bureau builds resiliency in the MCIT markets by continued investment in online digital advertising, coupled with modern visual assets such as virtual tours and virtual experiences.

MCIT plays a crucial role in generating revenues from business travellers to the NWT. The business traveller is the highest value traveller to the NWT, and the growth of bleisure is an essential consideration in this channel. They are the most technologically savvy, socially driven, shared economy smart travellers in the world today. There needs to be a focus on business travellers to extend their stay pre/post-event. The business traveller group includes government workers, executives, doctors, nurses, and other MCIT related groups.



MARKETING STRATEGIES AND TACTICS

NWT Tourism uses strategic insights to determine the right tactics to move core strategies and associated tactics. This is done by identifying channels where we can target primary, secondary, and emerging geographic markets. At the same time, we look to address psychographic and customer segments that match the NWT's core tourism assets. NWT Tourism aligns activities with a tourism focused path to plan when the right marketing activity should occur. The path to purchase model can also be seen as a funnel that depicts NWT's marketing strategies and tactics and their intentions graphically.

Integrated Marketing

The approaches and tactics employed through these strategies will be integrated across all channels, ensuring consistent messaging and branding throughout our marketing, thereby amplifying our marketing efforts and ensuring the best investment return. Integrated marketing across all channels and strategies, along with destination and regional marketing efforts, are more effective than stand-alone campaigns. Marketing activities focus on six strategic areas:

1. **Brand:** Enhancing and upholding our brand.
2. **Digital:** Always On.
3. **Content marketing:** Telling stories that engage.
4. **Lead with our best:** Experiences and unique NWT attractions.
5. **Partnership:** Working together for maximum impact.
6. **Research:** Strengthen how research and results drive decision making.

THE MARKETING FUNNEL

THE MARKETING FUNNEL HAS TWO DOMAINS: THE **MARKETING DOMAIN** AND THE **DESTINATION DOMAIN**.

The marketing portion focuses on four areas: Awareness, Engagement, Desire and Evaluation.

AWARENESS

The Awareness portion is about the destination and brand awareness. This is 'Always On' in a digital world with digital advertising, paid advertising, paid social media, organic search and SEO, paid search and SEM and social media marketing.

ENGAGEMENT

On dream list: Consumers are connected to earned or paid media; they have engaged with the NWTT website, or they may be communicating with NWTT social media or a member directly.

DESIRE

On consideration list: There may be itinerary planning, wish lists, or early contact with the NWTT call centre or online travel agents.

EVALUATION

Decision Time: Consumers will have engaged with NWTT content, there may be items in digital shopping carts after a jump-off to member sites, quotes for creating vacation plans or flights may be booked.

The other four key areas rely, for the most part, upon the destination to perform. These are the Conversion, Experience (Travel), Advocacy and Expansion areas of the customer journey.

CONVERSION

Transaction: Spending activity, bookings, deposits, detailed itinerary planning, selecting dates, and interactions with suppliers.

EXPERIENCE

Travel: Journey to and within the destination, customer experience

ADVOCACY

Value Add: Get to know the customers, add to the trip, buy a meal, positive flow-on effect from tourism.

EXPANSION

Word of mouth is the most powerful marketing tool: positive experiences build brand ambassadors for the destination.



MARTIN MALE / NWT

1. Brand: Enhancing and Upholding our Spectacular Brand to Maximize Destination Awareness

Our brand is what we want our market to think of when they think of the Northwest Territories. As such, it is critically important that our brand messaging is consistent across all initiatives, campaigns, activities, and products. It must be consistent whether we are marketing the NWT as a whole or any subset or region of the NWT, whether promoting Indigenous tourism, Aurora or any other particular sector.

The Spectacular NWT brand will traverse and integrate with every other strategy. It will resonate in our content and be ubiquitous in our digital presence. It will anchor our product marketing and be the driver of our partnerships. In support of this, NWT will update its brand visual assets this year.

Our Brand Promise

The Northwest Territories offers discovery – a wonderfully child-like type of discovery. We offer the thrill of a first-time experience, the surprise of discovering something new, the reward of trying something you have never done before. In short, Spectacular NWT is simplicity, surprise and awe.

The Northwest Territories' destination brand is what we want potential visitors to see as their "mind movie" when they think of the Northwest Territories. Through our marketing, the Spectacular brand provides a compelling reason for customers to select our destination for their travels.

We will continue to strengthen our brand and use it to maintain destination awareness, positioning the NWT as a place full of spectacular experiences, untouched wonder, and the ultimate destination for the traveller seeking a story of a lifetime.

We will continue to build on the promise that a visit to the Northwest Territories is a life-changing and transformative experience. Not only is the NWT Spectacular - but something here will leave you changed forever.

Photo and Video Assets:

Photos and video are a huge part of destination marketing. Consumers are drawn to visual content when it comes to booking their next adventure. Luckily for the NWT, there is no shortage of beautiful, inspiring visual content in the Territory. NWT Tourism's inventory of content is full of an assortment of high-quality visuals from all five regions.

NWT continues to increase the budget in these areas to allow for increased asset acquisition. This will fill the current gaps in

our content library. The challenges of travel restrictions also means that earned media opportunities are limited which will increase the cost of content creation and acquisition. By monitoring #SpectacularNWT for UGC, NWTT is investing more with NWT resident content creators and working hard on developing long-term relationships with the northern photo and video community.

NWTT aims to purchase a range of images representing all NWT regions and the diverse landscape, activities, and culture. When acquiring photo and video, it is essential to show genuine, true-to-life visuals that evoke emotional responses. Our visuals include experiences, locations, and details of real Northwest Territories adventures and the authentic cultural experience available to visitors. It is essential that images acquired are bright, warm, and awe-inspiring visuals that are 'on brand.'

The travel photography NWT Tourism seeks out goes further than just capturing a great image – it also tells a story, educates, and inspires. The photos NWT Tourism acquires pulls the viewer into the shot, making them wish that they were here. Spectacular brand photos tell a story and convey emotion, as well as a sense of the uniqueness of this place. Videography does the same, but over many frames. Photography that often performs best includes images captured in the first person, with a focus on a single person in frame while also featuring a spectacular landscape in the background.

2. Digital: Always On

Every trip begins online - be it through inspiring Instagram photos that start the mind movie, or looking up itineraries - the web is the central starting point for trip planning. Therefore, digital marketing intersects all of NWTT's marketing strategies. The digital space has become increasingly necessary after isolation periods saw a real need for people to stay connected while at home.

NWTT's digital marketing strategy uses various tools and tactics, including search engine optimization (SEO) and search engine marketing (SEM). It also uses programmatic media buying, retargeting, and paid ads on social media. Our digital strategy also includes monitoring trends in all channels, ensuring that NWTT is on top of emerging trends and their place in the digital space. For example, during COVID-19 response marketing, NWTT worked with partners to adjust messaging and remove display advertising away from news sites and other areas that put our destination at risk of being seen alongside negative news. With digital presence monitoring, we shifted programmatic advertising to a strategic list of content providers and specific audiences.

NWTT has an opportunity to engage the digitally connected traveller and enable them to easily find the information they are seeking in order to choose the NWT as their destination. The NWT must be present digitally at each stage in the consumer's path to purchase, from awareness through dreaming, engaging the user through their preferred content, creating the desire to consider visiting the NWT. Digital marketing enables people to imagine their vacation and get excited about itinerary planning. It aims to develop a feeling of urgency to finalize travel arrangements and book the trip to come and experience the NWT.

In 2022-2023, NWTT will continue to transform marketing online for improved reach and effectiveness. We will consider digital evolutions and digital extensions of existing tools such as the new consumer guide - the Spectacular Guide, email distribution, and how we tell our stories employing more video storytelling. We will continue to embrace social in everything we do, focusing on those things that make the NWT unique and by encouraging engagement. Being alive in the digital space not only builds awareness and helps consumers along the path to purchase, it also provides valuable tools for NWTT. Here we collect research and gather data that will help us better target our marketing efforts in real-time, and create content that continues to resonate with target consumers.

Calls to Action CTAs

Although we use calls to action CTAs in almost all marketing in some way, calling for action and the use of CTAs has been affected by the pandemic. It is not always appropriate to ask consumers to 'book now.' Therefore, using creative language to connect consumers through CTAs that offer more engagement and direction: Go Paddling, Reel in a Giant, See the Sky, and Experience the Culture are some examples of revised CTAs.

Social Media Strategy

Social media continues to be an essential tool for destination marketing. Social media is a direct-to-consumer platform and one of the most effective ways to engage, inform, and share firsthand experiences with potential visitors.

NWT Tourism works with our Agency of Record to manage domestic social media channels and international channels. NWTT must keep its online presence consistent and 'on brand' across all our platforms. The main objective for all social media channels is to increase brand awareness and engagement and provide a click through to the right content.



ANGELA GZOWSKI / NWTT

The primary tactical approaches employed are creating new organic content, repurposing owned content and sharing user generated content (UGC). Social media activity increases engagement with NWTT's following by liking, commenting, sharing content, and interacting with users daily on all social media channels.

Leveraging UGC with these users has been an effective way to promote the destination authentically. NWTT operates a UGC monitoring platform that helps NWT Tourism track user-generated images and content on social media platforms using hashtags (#SpectacularNWT and others). This platform also allows us to ask user permission to share their photos through our social media channels. Furthermore, closely monitoring social content allows NWTT to monitor member and professional photographer content. NWTT will purchase images from photographers in accordance with spectacular brand needs and with a priority to members of the NWT Professional Media Association. Photographers are encouraged to use #SpectacularNWT and reach out directly to NWTT for our list of required assets.

3. Content Marketing: Telling Stories That Engage

Stories are written into the brand and featured in the logo for a reason – content marketing. Using storytelling and content in destination marketing is an excellent strategy for multiple reasons. Not only is it a way to grow awareness and engage with our audience, but it also provides them with value. It does this by answering the audience's questions, educating them on the destination and bringing them further down the funnel toward a conversion. With content marketing, NWTT can build trust with the audience, add value and emotionally connect with consumers to generate jump-offs and leads for NWT tourism suppliers.

The tourism marketplace is always evolving, and consumers are continually demanding a stream of new content that fulfills their immediate needs. This includes engaging videos and storytelling, third-party testimony, as well as social evidence of the experiences that destinations offer. By having a likable array of content, NWTT reaches various segments

of its audience through their preferred medium. It also offers additional content opportunities on social platforms that can drive click-throughs to the SpectacularNWT.com website. By continuing to serve up the relevant content, NWTT can increase audience retention. Developments to the website have included a points-based algorithm that positions similar content on story pages to keep users engaged until they take action. Tools used to share UGC provide highly authentic content and encourage engagement. To this end, content that shows up at the right place and the right time for the right audience will improve the NWT connection to potential visitors.

Brand recall and retention will happen when spectacular content provides value, along with the unique and identifiable voice, style, and delivery of the Spectacular brand. NWTT is working to build trust and relationships with our audience by applying this strategy across all distribution channels. This highlights why great content is a vital asset for customer relations. It is the ticket to capturing audience attention and continually reinforcing a positive brand impression. Well-delivered content marketing can create a positive experience for potential visitors and give them the information they need to make educated decisions. NWTT premium content can compel people to come back for more and eventually experience the spectacular NWT's for themselves.

Results-based Content Development

Knowing what content audiences are seeking online is key to ensuring NWTT information, stories and videos are resonating with audiences and pushing them further down the conversion funnel. Content based on trends and industry insights leads to conversions in areas where opportunities lie. A strategic approach, starting with fact-based content development and keeping search engines in mind, is how all of our content is developed. We tend to amplify content that performs well against the metrics used to measure content performance. Stronger performing content gets pushed to the target audiences. If there is a topic of content that the marketing team wants to feature or push forward more, the content team develops this content with key findings from the tools used to measure content performance.

The recent upgrade and launch of the Aurora web page, 'World's Best Aurora,' is an example of responding to consumers' search and content needs. This page proved successful with comprehensive text, image and video content curated to provide more traffic. There was more traffic during the launch month than all the traffic combined in the year prior. This tactic is employed for future landing page developments with similar results expected.

Search Engine Marketing (SEO)

Search Engine Optimization (SEO) is essential for tourism marketing. SEO involves tactics that increase the visibility of a website or web page in a search engine's (i.e. Google or Bing) organic results. Activities to drive more search traffic to the SpectacularNWT.com website include: creating premium, long-form content; building a website structure that is search-engine friendly; including metadata for all webpages; and including alternative photo tags for all images on the website.

Some specific tactics that NWT Tourism uses on the website include the following:

- Ensuring that searchable keywords are present on all pages.
- Ensuring that the key word for search is included in the title of all stories .
- Updating the site infrastructure so that it conforms to industry standards.
- Refreshing content and adding new images and video whenever possible.
- Ensuring that descriptions, image captions and alternative text for images are all present.

Search Engine Optimization tactics are continually changing as Google and other search engines change their algorithms for determining which web pages are delivered first in a search. For example, organic search results that rank on page one of Google contain an average of 1,890 words, which gives excellent support to our premium story content strategy for the website.

4. Experiences: Lead with our Best

NWT Tourism will always lead with our best. Our in-market materials will highlight the best attractions and experiences available to visitors. We will show the world our cultures, wildlife, parks, unique landscapes, and spectacular natural environment. In line with our strategy, to highlight all regions of the NWT, we will lead with our best trade-ready regional products and, where there is no trade-ready product, we will lead with our best market-ready products. Our marketing is research-based and consumer demand-driven. We optimize marketing efforts based on what consumers want and where that demand aligns with products offered in the NWT. Demand drives a destination's ability to highlight other lesser-known attractions and regions. Research into consumer demand online helps identify areas of focus. Leading with our best means a strong focus in areas such as: Aurora, Indigenous experiences, paddling, wildlife viewing or simply some of the world's best fishing.

Worlds Best Aurora

The NWT has built a reputation as being one of the best destinations in the world for Aurora viewing. We are experiencing increasing competition both from within Canada and internationally. In addition to reaffirming that our Aurora are scientifically proven to be the best, we will ensure our messages reach target audiences and that we are top of website searches for both Aurora and Northern Lights keyword terms. The NWT has the world's best Aurora viewing opportunities and the goal is to spread this message.

Indigenous Experiences

Research reveals that Indigenous experiences are back on the travel list for Canadians, and a growth in demand is expected. Indigenous tourism experiences can help to create sustainable and meaningful employment for Indigenous communities, and provide opportunities for elders to pass down culture, history, and traditions to youth. This also benefits any business that collaborates with Indigenous groups as many NWT operators do.

There is an increased desire both domestically across the globe to travel with purpose. This includes discovering different people, cultures or landscapes and being immersed in local communities. It also means being conscious of contributing to the well-being of a place. The pandemic has enhanced the desire to connect in meaningful ways with places visited and foster a local regenerative economy.

In an era of more conscious and responsible travel, Canadian tourism organizations have a once-in-a-generation opportunity to take actions that are meaningful to both Indigenous communities, their tourism businesses, communities, and the visitors who could engage with them. NWT Tourism is focused on marketing tourism experiences with Indigenous operators and communities while supporting Indigenous tourism 'by' Indigenous people rather than 'about' Indigenous people.

Paddling Experiences

Paddling in the NWT is a unique experience as our rivers and lakes offer once-in-a-lifetime trips for both novice and expert paddlers. Marketing showcases the diversity of our waterways. From the Nahanni to the Barrenlands to rivers flowing from the lakes and the rivers of the NWT into the Arctic Ocean - the waterways are a key feature of what makes NWT spectacular.

Wildlife and Diverse Fish Species

For many travellers, capturing an image of a unique animal that can only be seen in a certain place is the most valuable souvenir they can bring back from a trip. The diverse wildlife and fish species in the NWT are key attractors. NWT Tourism promotes the diversity of wildlife and fish species through marketing and sharing unique stories about them.

5. Partnership: Working Together for Maximum Impact

Strategic partnerships provide the opportunity to lever messaging and resources synergistically. We will continue to seek out alignment between NWT Tourism objectives and potential project funding sources from partners such as CanNor, TIAC, ITAC and Destination Canada.

We will pursue co-marketing opportunities: innovative partnerships with non-traditional, non-competitor partners with complementary goals and similar audiences, such as the film commission, hotels, airlines, sporting goods manufacturers, and others. Co-marketing is a partnership between two or more companies where both companies participate in a marketing opportunity, split the costs, and share the benefits.

We will add value for NWTT members by offering co-op marketing opportunities that make marketing more affordable for both NWTT and its members. This can include reduced fees to participate in trade shows or advertising, for example.

Research: Strengthen How Research and Results Drive Decision-making

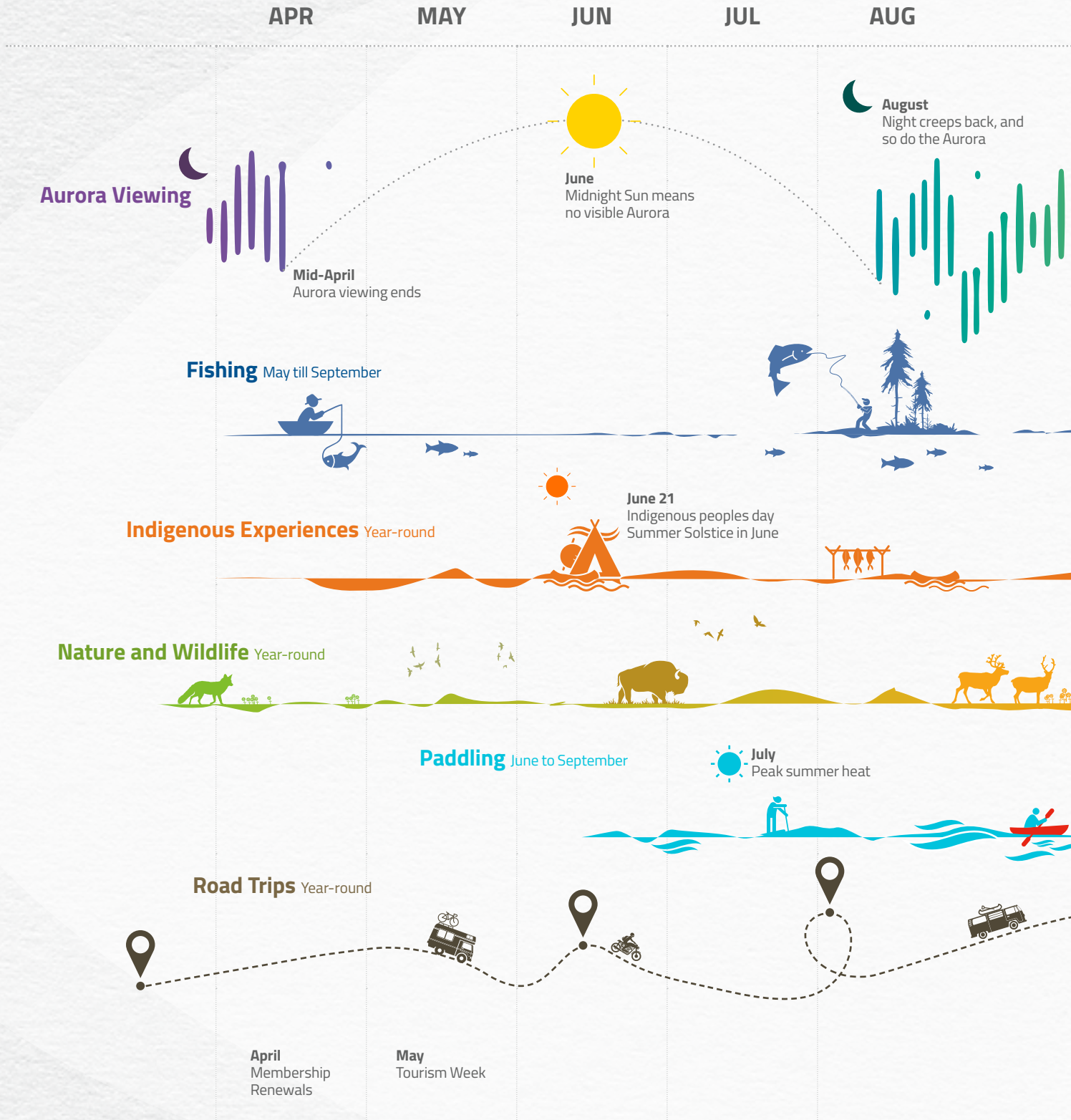
Marketing strategy relies on timely research which is planned, implemented, reviewed, and interpreted with key partners to underpin marketing success. This guides marketing messaging, timing and tactics. Marketing without research is guesswork and holds less potential to meet objectives. The pandemic has severely impacted the tourism landscape. New analysis into target demographics and re-establishing market knowledge will be critical. NWTT will continue to work closely with the GNWT to identify research needs and access data as it is gathered.

As part of our digital strategy, NWTT and its partners will study existing pools of data such as that available through Destination Canada, Google Analytics, and other online data sources. There is a continuous and essential need to conduct ongoing visitor profiling and analysis of the consumer journey. This enables predictive content development and marketing activity.



NICKY RICHARDS / NWTT

NORTHWEST TERRITORIES TOURISM SEASONAL ACTIVITY CALENDAR



SEP

OCT

NOV

DEC

JAN

FEB

MAR

September
Peak Aurora Month

February
Peak Aurora Month

December
Ice Fishing starts

September
Fall on the Barrenlands

October
Get cozy around
the campfire

November
First sign of snow

March
Snow King and other
spring festivals

Winter Activities November to March

NORTHWEST TERRITORIES TOURISM ANNUAL ACTIVITIES BY CHANNEL

ACTIVITY	CONSUMER	TRAVEL TRADE
GUIDE	Spectacular Guide (English and French)	
TRADE SHOWS	Toronto Sportsman Show, Toronto OAS, Montreal OAS, Calgary OAS, Vancouver OAS Snow Travel Expo Sydney/Melbourne Co-op opportunities increased	Focus Mexico Showcase Korea Rendez-vous (RVC) Corroboree, Australia
ADVERTISING PRINT	Evolve to new formats, multi-channel	Various placements
ADVERTISING DIGITAL	Always on	Geotarget RTOs at shows
ADVERTISING CO-OP	Member offers with enhanced value proposition	Min 1 per international market
MEMBERSHIPS		CITAP
VISUAL ASSETS	35,000 (+1000) with focus on video	1500 (+100) CANTO
WEB CONTENT	English – weekly Japanese – monthly Chinese – redirect to Weibo German – redirect to domestic site	English: Travel Trade website regular updates
SOCIAL MEDIA	Social media activity as per our social media strategy	
FAM		1 Qualified trade per market
NEWSLETTER	English - monthly	Travel Trade – quarterly in each market Sponsor content in trade e-newsletters

MEDIA

GoMedia, TMAC
International Media
Marketplace (IMM)

Various placements

Various placements

TMAC, Communications
Working Group (DC)

CANTO/Agility PR/Crowdriff

Update media site
Repurpose content in stories

Influencers' # posts
Share media stories

1 Qualified media/market
6 North America

Share media stories

MCIT

CME, IMEX, Tête-à-Tête,
Destination Direct, CSAE

Various placements

Targeted campaign

CSAE, MPI

1500 (+20)
CANTO

Update with strong call to
action, venues and hotels

Lever local businesses and
organizations

FAM for leisure & business to
maximize spend

Legend:

CITAP

Canadian Inbound Tourism Association

CSAE

Canadian Society of
Association Executives

DC

Destination Canada

FAM

Familiarization tour

MPI

Meeting Planners International

OAS

Outdoor Adventure Show

RVC

Rendez-vous Canada

RTO

Receptive Tour Operator

TMAC

Travel Media Association of Canada

MEE

Meetings and Events Expo



BUDGET SUMMARY

The marketing budget breakdown is provided by spend through the four channels of activities; Consumer, Travel Trade, Media, MCIT and by geographic markets; Canada (including French-speaking Canada), USA, Mexico, Germany (German-speaking Europe), Japan, China, South Korea and Australia. All channels are used to reach the targeted audience with a variety of marketing activities as identified geographically dependent on the target profiles and how best to reach them.

NORTHWEST TERRITORIES TOURISM 2022/23 MARKETING BUDGET

CALL CENTRE

Mail and Delivery	\$23,500.00
Service Supplies	\$1,000.00
Toll Free Telephone	\$4,000.00
Upgrades to System	\$20,000.00

Call Centre **\$48,500.00**

CONSUMER PROGRAM

Consumer Direct Marketing Program	\$44,500.00
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Consumer Program **\$44,500.00**

AGENCY CONTRACTS

Project Management	\$78,000.00
Europe	\$70,000.00
Asia Pacific	\$125,000.00

Agency Contracts **\$273,000.00**

COMMUNICATIONS

Media Shows and Events	\$6,500.00
Media Program (FAMS)	\$81,500.00
Media and Public Relations (MR/PR)	\$13,000.00
Photography Contracts	\$75,000.00
Media Show Travel (Go Media)	\$6,000.00

Communications **\$182,000.00**

MARKETING

North America	\$800,000.00
International	\$220,000.00

Total General Advertising **\$1,020,000.00**

North American Domestic Recovery	\$135,000.00
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Total North American Domestic Recovery **\$135,000.00**

Regional Advertising	\$100,000.00
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Special Projects	\$75,000.00
------------------	-------------

Brochure Development	\$47,000.00
----------------------	-------------

Business Meetings	\$2,045.00
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Promotional Materials	\$13,500.00
-----------------------	-------------

Research	\$25,000.00
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B2B Shows, Meetings and Virtual Events	\$37,000.00
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B2B Familiarization	\$16,000.00
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Trade Shows Registration & Fees	\$37,500.00
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Digital Development	\$253,000.00
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Marketing **\$606,045.00**

TOTAL MARKETING BUDGET **\$2,309,045.00**

NWT TOURISM CONFERENCE AND AGM

AGM Logistics	\$10,000.00
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Venue Expenses	\$10,000.00
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Speaker Travel (AGM)	\$10,000.00
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Speaker Fees and Expenses	\$20,000.00
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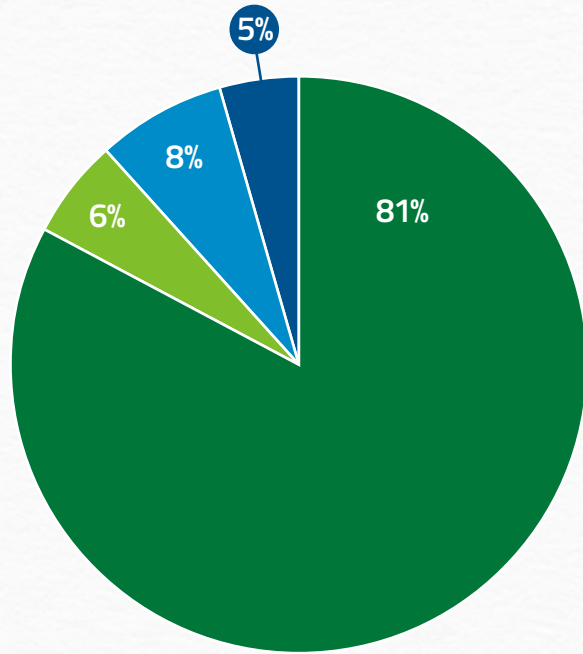
Market Ready Training/Conference **\$50,000.00**

TOTAL BUDGET **\$2,359,545.00**

BREAKDOWN OF MARKETING BUDGET \$3,009,545.00

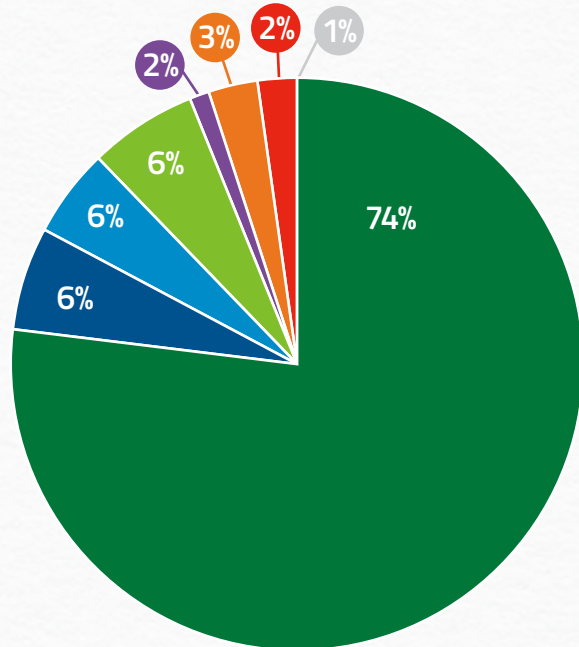
2022/23 Marketing Channel Budget Summary

- Consumer
- Media
- Travel Trade
- MC&IT



2022/23 Geographic Market Budget Summary

- Canada
- Japan
- Europe
- China
- USA
- Australia
- Korea
- Mexico



**Government of the Northwest Territories budget contributions only. Does not include additional funds secured by NWTT through partners such as CanNor or Destination Canada.*

CALL CENTRE

The call centre budget includes all non-human resource costs associated with operating the call centre, including mail and delivery, service supplies, toll-free telephone, and other associated costs. While the nature of contact with consumers has changed since the pandemic, with more consumers calling to request information about closed borders, the call centre still proves to be an essential avenue for connecting personally and directly with the consumer. It provides a means in which additional information on travelling to and within the NWT is shared with consumers. The call centre ensures that the NWT is kept alive in the hearts and minds of people who want to travel.

DIRECT-TO-CONSUMER MARKETING

NWTT participates in several consumer trade shows across Canada. The budget allocated to this activity has historically been used for shipping and courier costs, show fees and services, supplies to enable participation in these shows, and associated travel costs for NWTT staff to attend the shows. Restrictions on large gatherings and travel have greatly impacted NWTT's participation in this activity causing us to consider alternate methods and rely on our strong digital strategy. Our data-driven digital approach will ensure that we keep our destination connected to this important demographic.

Consumer show attendance primarily supports paddling, fishing and lodge sectors of the NWT tourism market. Geographic locations yielding a high rate of return have been identified as Ontario (GTA & Ottawa), Alberta (Calgary & Edmonton) and BC (Vancouver). In lieu of physically attending consumer shows for 2021, NWT Tourism has pivoted to a consumer direct digital campaign, using a combination of content marketing material, focused on affected sectors, delivered through social channels and supported by paid media in key markets.

AGENCY CONTRACTS

To help achieve the objectives of this marketing plan, NWTT contracts the services of Outcrop Communications. Additionally, NWTT has contracts with sales agents and marketing agencies to work with key language groups both domestically and in overseas markets including German, Japanese, South Korean, Australian and Chinese. This budget reflects those contract costs.

COMMUNICATIONS

Communications include costs associated with the development and production of newsletters and publications, as well as our interactions with the media, through whom we communicate with our target markets. Communications expenses include: media show fees, media familiarization, media events and promotions, newsletters and publications, photography (contracts, rights acquisition, library cataloguing), supplies and materials, and media show travel.

MARKETING

Marketing encompasses the greatest proportion of the NWTT budget. It includes all costs associated with core advertising, special projects, business meetings, promotion materials, research and reporting, Trade and MCIT travel and familiarization tours, trade show registration and fees, and the development of digital tools such as our 360 degree videos.

MARKET READY TRAINING

NWTT prepares and delivers market ready and other industry training as part of its annual general meeting. This budget is for costs associated with AGM logistics and venue expenses, and speaker travel, fees and other related expenses.

APPENDIX A: EQ MARKET SEGMENTS



FREE SPIRITS

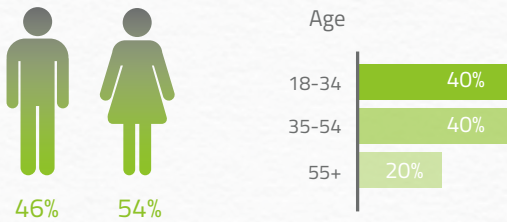
13% OF GLOBAL MARKET

Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others.

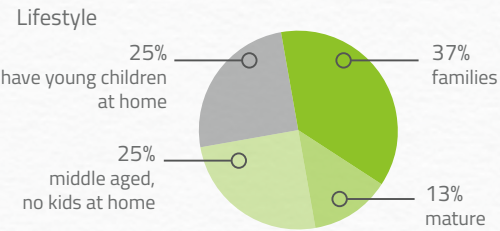
SOCIAL VALUES

Joy of consumption, social mobility, attraction for crowds, confident risk takers, see themselves happy and full of life. They want to show their success to the world

DEMOGRAPHICS



Income: Higher than average



TRAVEL VALUES

Luxury, bragging rights, checklist samplers

CULTURAL EXPLORERS

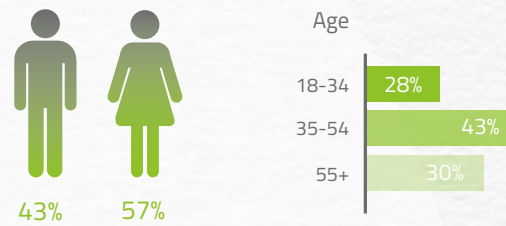
12% OF GLOBAL MARKET

Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit. They are open, accepting, non-traditional and enthusiastic.

SOCIAL VALUES

Spontaneity, cultural sampling, adaptable to environment, enjoy trying new experiences, like to feel in control, long for personal escape, enjoy personal challenge

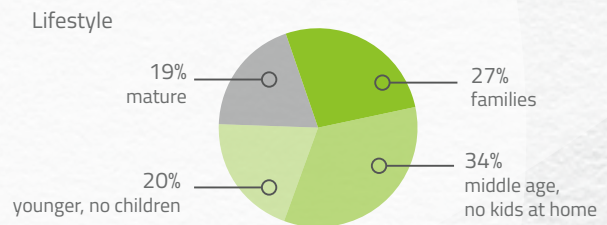
DEMOGRAPHICS



Employment: Full-time employed (lower percentage of retirees)

Education: Higher than average

Income: Average



TRAVEL VALUES

Constant travel (excited about the next trip), living history, culture, beauty of nature, see travel as a journey, going with the flow

AUTHENTIC EXPERIENCERS

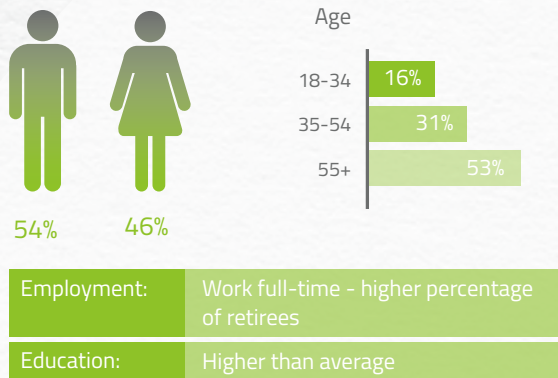
9% OF GLOBAL MARKET

Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit. They are steadfast, understated, responsible, interested and rational.

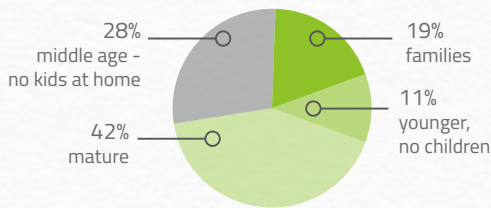
SOCIAL VALUES

Personal control, spontaneity, cultural sampling, the need to feel responsible, skeptical towards advertising, concerned for the environment

DEMOGRAPHICS



Lifestyle



TRAVEL VALUES

Living history/culture, comfort and rejuvenation, escape from the daily pressures of life

NO HASSLE TRAVELLER

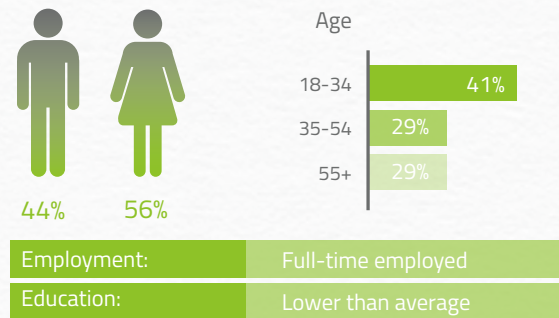
11% OF CANADIAN MARKET
10% OF AUSTRALIAN MARKET

No-Hassle Travellers are extroverted, flashy people who seek secure group travel, allowing them to be pampered in luxurious surroundings while seeing all the main sights of a destination.

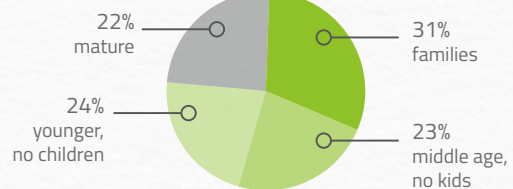
SOCIAL VALUES

Financial security, huge consumers, like to use their purchases to impress others, confidence in advertising, like to keep things simple, believe in big brands

DEMOGRAPHICS



Lifestyle



TRAVEL VALUES

Seek comfort, checklist travel, luxury, like to show off their status

SOCIAL SAMPLER

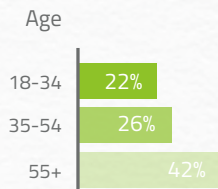
14% OF AUSTRALIAN MARKET

Social Samplers are defined by their affinity for travelling in groups, as well as by the idea that time is limited while travelling, thus they show a preference for focusing on 'must-see' attractions.

SOCIAL VALUES

Living virtually, meaningful moments, savor the pleasures of life, high respect for authority, find it thrilling to try new things

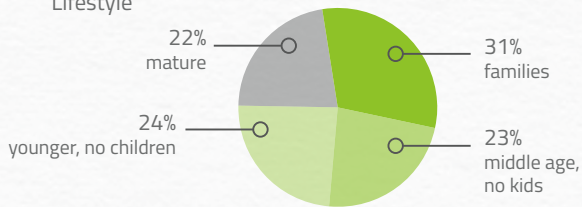
DEMOGRAPHICS



Employment:	Full-time employed, higher than average part time or retired
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Education:	Lower than average
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Lifestyle



TRAVEL VALUES

Group travel, historical traveller, sampling a variety of experiences, sharing experiences with others, constant travel

PERSONAL HISTORY EXPLORER

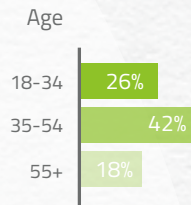
13% OF CANADIAN MARKET
14% JAPANESE MARKET
10% SOUTH KOREAN MARKET

As travellers, Personal History Explorers are primarily defined by their desire to connect to their own cultural roots – and do so by travelling in comfort, style and security.

SOCIAL VALUES

Love to savour life's pleasures, need for status recognition, search for family roots, concern of appearance

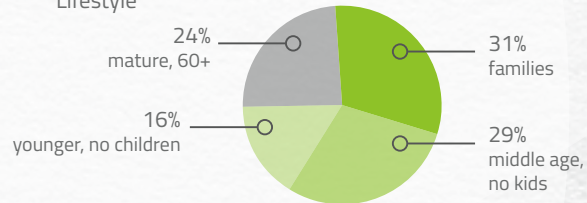
DEMOGRAPHICS



Employment:	Full-time employed, higher than average part time or retired
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Education:	Lower than average
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Lifestyle



TRAVEL VALUES

Discovering their roots, comfort and luxury, security, shared experiences

REJUVENATORS

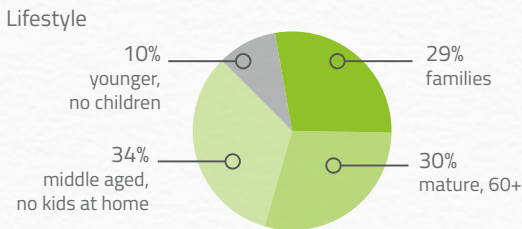
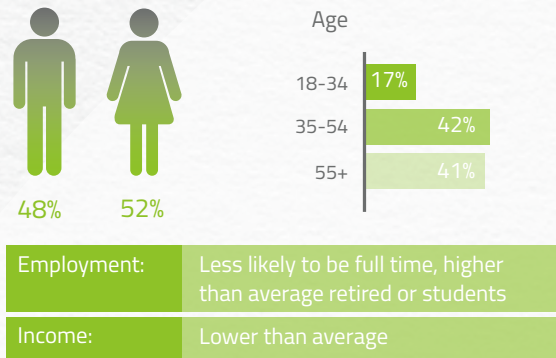
6% OF CANADIAN MARKET

Rejuvenators are family-oriented people who travel with others to escape from the stresses of everyday life to get pampered and indulge themselves.

SOCIAL VALUES

Stand up for their own beliefs, penchant for saving money, yet will buy on impulse, ethical consumerism, meaningful moments, they stick with social conventions

DEMOGRAPHICS



TRAVEL VALUES

Seek comfort, looking for escape, prefer unstructured travel, awestruck by nature, see a vacation as a time to be carefree and indulge

GENTLE EXPLORERS

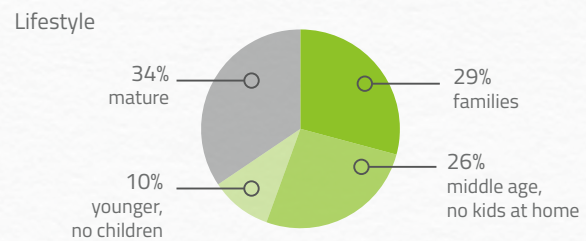
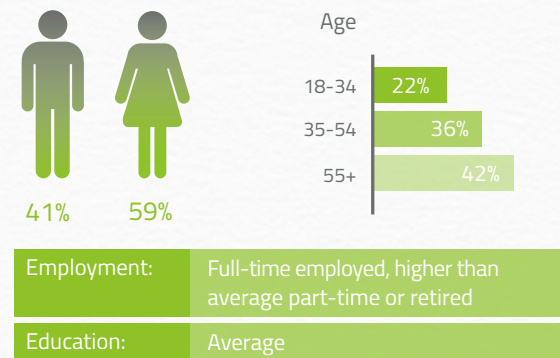
25% OF CANADIAN MARKET

Gentle Explorers are primarily defined by their reluctance to venture far beyond the comfort of home and travel 'on condition,' demanding the very best and most comfortable environments for themselves when they must do so.

SOCIAL VALUES

Living virtually, meaningful moments, savor the pleasures of life, high respect for authority, they find it thrilling to try new things

DEMOGRAPHICS



TRAVEL VALUES

Group travel, historical travel, sampling a variety of activities, enjoy sharing experiences with others, constant travel

CULTURAL HISTORY BUFFS

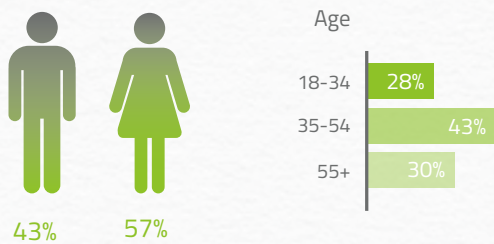
12% FRENCH MARKET
16% JAPANESE MARKET
16% SOUTH KOREAN MARKET

Cultural History Buffs are defined by their focused interest in the history, culture and natural surroundings of the places they visit. They are driven to learn everything about a culture, in the company of other like-minded people.

SOCIAL VALUES

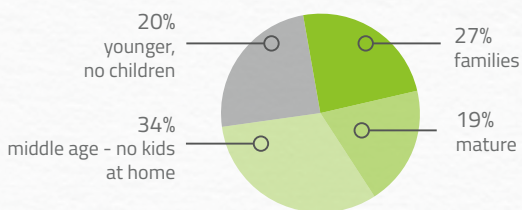
Importance of spontaneity, guided by emotions and will change options easily, approach life with vitality, autonomy and personal control, feel more confident to deal with unexpected changes

DEMOGRAPHICS



Employment:	Full-time employed (lower percentage of retirees)
Education:	Higher than average

Lifestyle



TRAVEL VALUES

Nature, historical travel, cultural emersion, group travel, constant travel.

ASPIRING ESCAPISTS

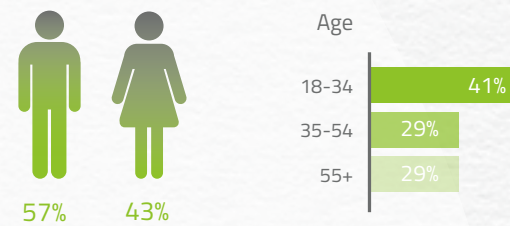
20% CHINESE MARKET

Aspiring Escapists are stressed about life in general and more apprehensive about travelling – but if travel offers sufficient comfort and safety, they may be tempted to leave the comforts of home to escape.

SOCIAL VALUES

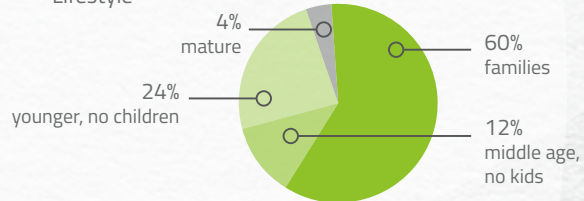
Financial security and social mobility, high importance on aesthetics, fashion and brand, time stress and fatalism from busy hectic lifestyles, voluntary simplicity

DEMOGRAPHICS



Employment:	Highest share of full-time employment
Education:	Mainly university and college
Income:	Above average

Lifestyle



TRAVEL VALUES

Comfort and luxury, safety, like to show off their travel experiences to their friends, like to briefly try a variety of experiences

APPENDIX B: TARGET SEGMENTS - SNAPSHOT OF AFFLUENT AND MATURE SEGMENT*

For more information on target segments contact NWTT.



MEDIA AFFLUENT & MATURE

TOP RADIO PROGRAMS

Programs (Weekly)

News/Talk	31.3%
Mainstream Top 40/CHR	19.3%
Adult Contemporary	16.9%
Classic Hits	14.4%
Hot Adult Contemporary	13.8%
Multi/Variety/Specialty	12.5%
Today's Country	11.5%
AOR/Mainstream Rock	11.0%
Modern/Alternative Rock	9.1%
Not Classified	7.5%

TOP TV PROGRAMS

Programs (Average Week)

Movies	47.3%
Evening local news	37.3%
Primetime serial dramas	30.7%
News/current affairs	29.0%
Hockey (when in season)	28.1%
Home renovation/decoration shows	26.1%
Suspense/crime dramas	26.1%
Situation comedies	26.0%
Documentaries	25.5%
Cooking programs	22.3%

TOP NEWSPAPER SECTIONS

Frequency Read (Occasionally/Frequently)

Local & Regional News	58.0%
National News	54.2%
International News & World	51.4%
Movie & Entertainment	36.1%
Health	34.2%
Editorials	32.5%
Food	32.3%
Sports	30.7%
Business & Financial	29.9%
Travel	29.3%

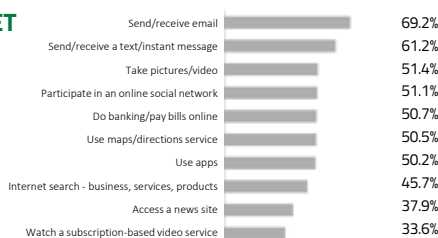
TOP MAGAZINE PUBLICATIONS

Read (Past Month)

CAA Magazine	11.2%
Canadian Living	8.3%
Other U.S. magazines	7.9%
Other English-Canadian	7.5%
Maclean's	5.5%
Hello! Canada	5.4%
Cineplex Magazine	5.1%
National Geographic	5.0%
Food & Drink	5.0%
People	4.5%

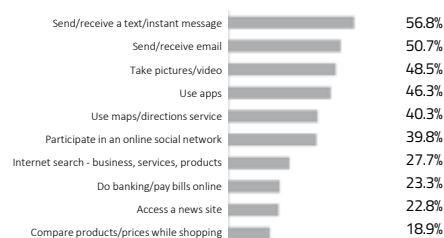
TOP INTERNET ACTIVITIES

Activity (Past Week)



TOP MOBILE ACTIVITIES

Activity (Past Week)



NWTT VISITOR PROFILES



KEY TOURISM ACTIVITIES

LEGEND Highest group Lowest group

ACTIVITY

ACTIVITY	AFFLUENT & MATURE	MATURE EXPLORERS	CULTURAL TRAVELLERS	MIDDLE-CLASS FAMILIES	DIVERSE TRAVELLERS
Adventure sports	11.6%	9.6%	10.8%	11.2%	10.8%
Art galleries, museums & science centres	33.4%	33.8%	34.4%	33.0%	33.2%
ATV & snowmobiling	11.7%	15.6%	12.5%	20.4%	9.0%
Beer, food & wine festivals	11.7%	10.5%	11.3%	9.2%	-
Camping	46.8%	46.5%	46.1%	52.4%	42.3%
Canoeing & kayaking	34.9%	33.4%	34.1%	32.9%	31.7%
Cross country skiing & snowshoeing	20.5%	22.4%	19.2%	21.2%	16.4%
Curling	7.8%	8.7%	7.9%	10.9%	6.4%
Cycling	43.1%	40.1%	41.0%	41.0%	37.2%
Exhibitions, carnivals, fairs & markets	36.6%	40.9%	36.4%	39.4%	-
Fishing & hunting	23.9%	28.5%	24.6%	33.1%	20.2%
Hiking & backpacking	38.7%	37.8%	37.3%	36.2%	37.6%
Historical sites	26.8%	26.9%	25.7%	27.0%	25.2%
Motorcycle shows	1.4%	1.2%	1.2%	1.2%	1.1%
Music festivals	8.5%	9.7%	9.0%	9.6%	-
National or provincial park	28.0%	31.5%	28.2%	33.4%	23.7%
Parks & city gardens	36.2%	40.3%	36.5%	38.5%	-
RV shows	2.1%	2.8%	2.0%	3.2%	1.5%
Sportsman & outdoor shows	2.2%	2.7%	2.4%	3.2%	2.1%
Travel shows	1.5%	1.4%	1.3%	1.2%	1.6%



NWTT VISITOR PROFILES




TARGET GROUPS AFFLUENT & MATURE (MARKET: CANADA EXCLUDING NT, NS, NB, NL)

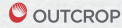
This group is composed of Canada's wealthiest households, which tend to be older, living in cities or suburbs. They see themselves as having worked hard and enjoy rewarding themselves for their efforts. They value status symbols and gravitate towards opportunities they personally find valuable or distinguishing.

 **Total Population: 2,609,657**
7.4% OF MARKET
(35,352,147)

 **Total Households: 874,620**
6.3% OF MARKET
(13,955,923)

 **Average Household Income: \$203,016**

 **Median Household Maintainer Age: 58**



EQ SEGMENTS (% of target group households)


EQ Segment	% of target group households
Free Spirits	100%
Authentic Experiencers	100%
Cultural Explorers	
Cultural History Buffs	
Personal History Explorers	
Gentle Explorers	
No Hassle Travellers	
Virtual Travellers	
Rejuvenators	

TOP GEOGRAPHIC MARKETS

Census Metropolitan Area	Target Group		Market	
	% of Group	% of Market	HH Count	% of Market
Toronto, ON	24.7	9.2	2,330,252	19.6
Vancouver, BC	10.7	9.0	1,033,601	8.7
Calgary, AB	8.7	13.3	565,543	4.8
Ottawa-Gatineau, ON/QC	8.1	12.0	580,720	4.9
Edmonton, AB	5.0	7.9	547,874	4.6
Montréal, QC	4.8	2.3	1,817,206	15.3
Hamilton, ON	4.5	12.4	312,700	2.6
Winnipeg, MB	3.3	8.6	326,742	2.8
London, ON	2.7	10.6	222,421	1.9
Victoria, BC	2.6	12.9	172,186	1.5

 **52.1%**
Couples With Kids at Home

 **40.2%**
University Degree

 **25.7%**
Born outside Canada

 **63%**
Married/Common-law

 **23.6%**
Belong to visible minority group

NWTT VISITOR PROFILES



LEGEND

C	Consumer and Call Centre	B	Business	F	Fishing
M	Media	T	General Touring	H	Hunting
TT	Travel Trade	O	Outdoor Adventure	A	Aurora
MCIT	Meetings, Conventions and Incentive Travel	V	Visiting Friends and Relatives		

APPENDIX C: GEOGRAPHIC MARKETS

Before the pandemic, NWT Tourism’s target markets were well-established. These are supported by Destination Canada data and internal and external research. At the time of writing, there is much uncertainty globally about the long-term effect on travel and tourism within and between countries. We will keep up-to-date on research and other information related to travel as we move forward. When the pandemic subsides, we will rely on this research to ensure that NWTT is focusing on markets that have the best opportunity for a high return on investment for the territory.

For this report, we are including our traditional markets with the addition of the Northwest Territories as a target market. With the NWT border closed to leisure travel, local staycations are an important target market for us. While the data below will need to be updated and adjusted, it does give a snapshot of our target market intelligence before the pandemic emerged. The most important point here is that we need both domestic and international tourism to succeed. Staycations and domestic visitation offer a much smaller visitor spend and lower revenue per guest. In the latest data from Destination Canada the baseline average visitor amounts for spend are;



NORTHWEST TERRITORIES



POPULATION: 45,161

AUDIENCE SIZE: 12,780

AVERAGE HOUSEHOLD INCOME:
\$134,057*

The Northwest Territories offers a unique value proposition. The Northwest Territories has the highest median personal income in Canada; however, we have only a small population of adults to target to engage in a tourism-related activity. The right price point will be vital in driving success in this market as we have seen with staycation success going to operators who adjusted their pricing and product

to suit the local market. There is hope, however, as many residents have moved here from outside of the territory and are eager to partake in activities that would be normal daily activities to long-time residents.

Regions have a unique opportunity to test products and offerings to a 'gritty' northern audience. This will enable the development of new products that will have success with the first VFR and domestic visitors we see. There is an opportunity to rebuild products with locals in mind and a plan to scale experience offerings that become

feasible with domestic and international audiences.

Strategy: A community-based strategy will include local media advertising with print, digital, radio and social media. NWT Tourism will utilize Staycation messaging to encourage NWT residents to explore their backyard. Geo-targeted social media posts have met with success and will continue to be used to build Spectacular brand ambassadorship to welcome VFR and returning domestic visitors when the time is right.

* NWT BUREAU OF STATISTICS:
[HTTPS://WWW.STATSNWT.CA/LABOUR-INCOME/INCOME/INDEX.HTML](https://www.statsnwt.ca/labour-income/income/index.html)



CANADA



POPULATION: 37.6 Million

AUDIENCE SIZE IN CANADA:
2.17 million

**AVERAGE SPEND PER VISITOR
(EXCLUDING AIR):** \$380

EQ TRAVEL SEGMENTS:
Learners aged 35-64

With current geopolitical and health/safety issues around the world, Canadians are limited to travel at home. Like most other Canadian destinations, the NWT traditionally draws most of its visitors from within Canada. Canadian visitors accounted for 60 – 80% of travellers to the NWT in 2019. Domestic marketing efforts of NWTT have focused on increasing general awareness of the Northwest Territories. In 2019, the number of Canadian visitors to the territory was at an all-time high. Due to the COVID-19 pandemic and

its impacts on international visitation, NWTT has shifted focus to attract more Canadians to visit the territory through domestic marketing efforts.

Travel from any major city in Canada to the NWT can be accomplished in a day. While the cost to travel to the NWT can be more expensive than travel to most southern cities, competition between major airlines creates regular seat sales and price competitiveness.

RECEPTIVE TOUR OPERATORS (RTO): Discover Holidays, Jonview, JAC, Entrée Destinations, Dominion Tours, Anderson Vacations

TRAVEL TRADE SHOWS: Rendez-vous Canada 2021 (Edmonton), CITAP Winter Function

MEDIA TRADE SHOW: GoMedia Canada (national and international media), TMAC

CONSUMER TRADE SHOWS:

Toronto Outdoor Adventure Show, Toronto Sportsman Show, Calgary Outdoor Adventure Show, Montreal Outdoor Adventure Show, Vancouver Outdoor Adventure Show

MCIT: Canadian Meeting and Events Expo, CSAE, Tête à Tête and Destination Direct

STRATEGY: Content approach, guided by editorial calendar focusing on planning/booking cycle. Refresh top content, deeper with more content and fewer publishers. Integrate messaging across all platforms with emphasis on digital/social focus. Expand on our digital platforms and create more opportunities for collateral development such as video, augmented reality, search engine marketing. Canada 'NICE' Partnership with Destination Canada for content promotion.



UNITED STATES



POPULATION: 328.2 Million

AUDIENCE SIZE IN US:
4.75 million

**AVERAGE SPEND PER VISITOR
(EXCLUDING AIR):** \$738

EQ TRAVEL SEGMENTS:
Learners aged 25-44,
Free Spirits 25-44

Before the pandemic, the United States was Canada's most significant source of international visitors. The average spend for a US visitor was \$738 in 2018, and approximately 14.4 million Americans visited Canada. From January to November 2019, US arrivals to Canada by automobile and air averaged a combined year-over-year growth of 7%. However, Destination Canada projects that due to the ongoing pandemic, the change in tourism export revenue from 2019 will be down 85% or approximately \$9.4 billion dollars.

Typically, American travellers like to take advantage of long weekends for travel, with 70% of all travel taking place between May and October. Around 11% of potential American travellers to Canada expressed an interest in visiting Canada's north, and one in three US visitors expressed an interest in Indigenous cultural experiences.

According to Destination Canada, some of the top activities that American leisure travellers wanted to experience were trying local food and drink, nature-based, including seeing natural attractions, hiking or walking in nature, visiting nature parks, and viewing wildlife.

Air travel from many major US cities to Yellowknife can be achieved in one day. Most US flights connect through Toronto, Montreal, Calgary, or Vancouver.

TRAVEL TRADE SHOW:

Travel Exchange (NTA)

MEDIA TRADE SHOW: US Market (TBD)

MCIT TRADE SHOWS: IMEX

STRATEGY: Content approach, guided by editorial calendar focusing on planning/booking cycle. Refresh top content, deeper with more content focusing on angling, paddling and general touring. Integrate messaging across all platforms: social/digital. Explore more digital platforms and opportunities such as video, augmented reality, search engine marketing. Have relevant content ready and available for immediate marketing once travel restrictions allow.

TRAVEL TRADE KEY ACCOUNTS:

Collette, Road Scholar, Globus,
The Ensemble Group



CHINA



POPULATION: 1.4 billion

AUDIENCE SIZE IN CHINA:
2.04 million

**AVERAGE SPEND PER VISITOR
(EXCLUDING AIR):** \$2,668

EQ TRAVEL SEGMENTS:

Escapists aged 35+ from Tier 1 cities (Beijing, Shanghai, Guangzhou and Shenzhen), Free Spirits 35-44

Pre-pandemic, China was Canada's second-largest long-haul market. While China was the earliest travel market to be hit by COVID-19, at the time of writing, it is already in post-COVID recovery with a surge in domestic tourism and booming consumer confidence. While the geopolitical climate and China-Canada relations are often a concern for tourism, there is no denying the Chinese tourism market's value. China also presents a valuable average visitor spend of \$2,668 per visitor, ranking as one of the top spenders of all countries, when given the opportunity to do so.

Notable to NWT recovery planning, there are over 1.5 million local Chinese already living in Canada. Local Chinese have high probability of repeat travel and are more likely to visit lesser-known areas of Canada and in off-peak season. It is anticipated this demographic of local Chinese already comfortable travelling in Canada will be among the first to visit NWT when borders reopen.

Most Chinese visitors to the NWT stay for three nights. Some Chinese travellers have stayed longer and expressed interest in visiting areas outside of Yellowknife. Road and self-drive trips are increasing in popularity among the Chinese, creating new opportunities for the NWT regions and lesser-known products.

TRAVEL TRADE SHOWS: Showcase Canada-Asia, CITAP

STRATEGY: Sustain consumer awareness of NWT as a travel destination in key Chinese-language markets: Chinese in

Canada are first priority, followed by Greater China including an expanded focus on Taiwan and Hong Kong. Increase short-haul travel and product knowledge among local Chinese living in Canada, and engage this audience to stimulate Chinese travel globally when safe to do so. In step with Destination Canada in China and major tourism boards, NWTT is maintaining baseline trade and digital activities in China appropriate to the market conditions and consumer sentiment. Digital initiatives will focus on bringing the best of NWT to the consumer at home, and leveraging new platforms that excel at virtual experiences. Trade activities with Chinese travel agencies in Canada and China will cultivate and deepen relationships with active companies most likely to send travellers to NWT in the future. In addition, NWT will develop and expand Chinese-language materials that showcase local operators and businesses in web, print and digital formats.



POPULATION: 126.8 million

AUDIENCE SIZE IN JAPAN:
2.63 million

**AVERAGE SPEND PER VISITOR
(EXCLUDING AIR):** \$2,019

EQ TRAVEL SEGMENTS:

Free Spirits 25-34, Cultural History
Bufs 55+

In 2018, 251,240 Japanese travellers visited Canada, spending on average \$1,810. This was down significantly from 2017—a drop of about 15%. The 2019 visitor forecast without the pandemic factored in is down a further 3.5% to approximately 242,000. However, spending was forecast to grow by 1.3%.

Of the identified Japanese target market, 27% indicated they are likely to visit Canada in the next two years, with 14% of those saying they are interested in visiting the north.

Japanese visitors have been travelling to Yellowknife for more than three decades, and the Canadian north is well-known in Japan for its Aurora and natural attractions.

Air access to Canada increased in recent years before the pandemic, with flights from Osaka to Vancouver. This is in addition to direct flights between Tokyo and Calgary. Direct flights between Vancouver and Yellowknife, and Calgary and Yellowknife have made the NWT highly accessible to Japanese travellers.

Most Japanese visitors prefer to have a Japanese-speaking guide for their tours, and some will request specialty food during their stay.

TRAVEL TRADE SHOWS: The importance of this market requires an annual trade update. Partners will be sought in-market to maximize efficiency of a sales and training visit.

STRATEGY: The show, Focus Japan, is held every second year. It is anticipated that the next event will take place in October of 2022, but no specific dates have been established yet. In years where there is no trade show, we increase sales calls to maintain our presence. Ensure seasonality of the message to align with planning and booking timelines. Drive consumer demand through fresh Japanese language content across multiple channels. Nurture relationships with travel agents and key trade partners. Maintain a general sales agent in market. Establish long-term relationships with online travel agencies.

TRAVEL TRADE KEY ACCOUNTS: H.I.S., JTB World Vacations, Kiki Nippon Travel Agency, Maple Fun Tours, JalPak



SOUTH KOREA



POPULATION: 51.6 million

AUDIENCE SIZE IN SOUTH KOREA:
3.56 million

**AVERAGE SPEND PER VISITOR
(EXCLUDING AIR):** \$1,751

EQ TRAVEL SEGMENTS:

Free Spirits 25-34, Free Spirits 55+

Many South Korean travellers arrive in Canada after a stay in the United States, rather than flying into Canada directly. Month-over-month statistics show growth in the number of arrivals of South Korean visitors of one to two percent prior to the pandemic. On average, South Korean visitors spend \$1,751 in Canada and average eight nights stay.

Travellers from South Korea are interested in Canada's natural and cultural settings. About 22% of potential visitors expressed interest in visiting Canada's north. Of note, more than half of South Korean travellers to Canada were solo travellers—more than any other of the NWT's target markets. More than half of South Korean leisure travellers booked an organized group travel package, predominantly via online travel agents or tour operators. Approximately 32% of the market also expressed interest in participating in Indigenous cultural experiences, which makes the NWT a desirable location.

TRAVEL TRADE SHOWS: Focus Korea

STRATEGY: NWT Tourism will maintain the status quo with respect to South Korean marketing efforts. We will partner with Destination Canada on marketing activities and continue to build awareness of the NWT in market through social media content and responsiveness. NWTT is looking to partner with domestic key accounts to target Koreans residing in Canada to build resilience in the VFR market when international travel returns.

TRAVEL TRADE KEY ACCOUNTS:

Pharos Travel, Hana Tour, Mode Tour, Prime Travel



GERMAN-SPEAKING EUROPE

(GERMANY / AUSTRIA / SWITZERLAND)



POPULATION:

83.1 million Germany,
8.6 million Austria,
8.55 million Switzerland
= 100.25 million

AUDIENCE SIZE IN GERMANY:

3.22 million

EQ TRAVEL SEGMENTS:

Learners aged 25-34, Free Spirits 45-64

According to Destination Canada research, Canada ranks third, behind the United States and Thailand, for long haul travel by Germans. In 2019, approximately 412,000 Germans visited Canada, up 1.5% from 2018. German travellers spend, on average, \$1,720 when they visit Canada which is more than any other European market. Germany remains the world's third largest outbound market in terms of tourism expenditures. Both interest and actual travel to Canada were highest among German leisure travellers between May and October 2019.

Of potential German travellers to Canada, a significant 21% indicated they are likely to visit the north. Use of travel agents/tour operators for either planning or booking purposes was up significantly in 2019 compared to other international markets.

Top experiences German leisure travellers desire while on holiday include sampling local food and drink, summer and fall outdoor experiences, exploring Indigenous culture, city tours and exploring places other tourists won't go which is a great fit for the Northwest Territories. Natural attractions, visiting nature parks, wildlife viewing, and hiking/walking are the top trip anchor activities for German travellers. Northern Lights are also a big draw, particularly among German-speaking travellers ages 25-34 (46% interest).

The majority of German leisure travellers on their most recent trip to Canada (60%) did not travel in an organized group travel package.

Germans are a good fit for travel to Canada as they typically have five to six weeks of annual vacation and are avid travellers. They also prefer natural areas to cities. Most Germans speak enough English that they do not require the use of an interpreter while travelling. Germans tend to plan trips well in advance, often four months or more prior to booking.

Air access from Germany to Canada has been excellent. Airline seat capacity increased in 2018 by another 3.5% and we expect to see all airline routes recover enabling access to key airports such as Edmonton or Whitehorse.

STRATEGY: Similar to the North American strategy, focus will be on increasingly digital delivery of destination information. We will drive consumer interest through social media accounts while redirecting website traffic. We will maintain relationships with media, travel trade and our general sales agent in market. Germany continues to show positive growth to the Western Arctic region, particularly the Northwest Territories, with 177 recorded German visitors visiting this region in 2018. NWTT will align its tactics with the Yukon to further promote road traffic to the Western Arctic, and the South Slave/Dehcho regions for road trip options to Nahanni and Wood Buffalo National Parks

TRAVEL TRADE KEY ACCOUNTS: Canusa Touristik, SK Touristik, Dertour, Travel House/Hotel Plan (CH)



AUSTRALIA



POPULATION: 25.7 million

AUDIENCE SIZE IN AUSTRALIA:
995,500

**AVERAGE SPEND PER VISITOR
(EXCLUDING AIR):** \$2,293

EQ TRAVEL SEGMENTS:

Cultural Explorers 25-34,
Social Samplers 55+

Australia ranks as a top 20 country across a wide range of indexes including the economy, international trade, investment, education, and other global indexes. Prior to the COVID-19 pandemic, Australia had completed 28 consecutive years of annual economic growth—one of the few economies in the post-WWII period to achieve this — (2018-19) (Australian Bureau of Statistics).

Year-end 2019, Statistics Canada customs tabulations reported 354,000 overnight arrivals from Australia by air and sea almost on par with the previous year.

Direct air access from Australia to Vancouver sees British Columbia as the most visited province, with itinerary combinations of Western Canada being the most sought-after packaged vacation.

Aurora viewing and wildlife remain to be the top two reasons Australians want to travel to Canada, combined

with rail travel, glacial lakes and Rocky Mountains in summer months, and winter wonderland plus skiing in winter months. Both seasons provide great opportunities for the Northwest Territories to be combined with trip to Western Canada.

The average length of stay for Australian travellers ranges between 18 to 25 days and Australia continues to be one of the highest international spenders in market.

The COVID-19 pandemic has had an unprecedented impact on the global economy and Australia was not immune to its effects. This impact was off the back of an extreme bush fire season in late 2019 and early 2020. These combined impacts pushed Australia into its first recession in 30 years. In October 2020, the Australian Federal Government announced plans to inject \$98 billion into jolting Australia's economy.

The Australian Federal Government is aiming to target six advanced sectors in a modern manufacturing strategy for recovery, growth, and a resilient economy. The sectors are resources and critical minerals, food and beverages, medical products, recycling plus clean energy, defence, and space.

TRAVEL TRADE SHOWS: The Australian tourism industry is heavily reliant on

the travel trade for conversion due to the distance in travel from Australia to Canada, and the cost of travel. Destination Canada's roadshow in Australia, "Corroboree" is set to take place every two years. At the time of writing, this event is not scheduled for 2022, therefore NWTT will focus on both key travel trade led trade shows and also consider consumer facing shows linked with trade including the Snow Travel Expo to capitalise on future winter Aurora bookings.

STRATEGY: Ensuring future growth via incremental tourism revenue, NWTT will motivate travellers with compelling reasons to visit around the two Aurora seasons 1) summer/spring and 2) winter. Iconic distinctions of Aurora variations for NWT vs the rest of the world will be highlighted through Indigenous and cultural identities, free spirited local people and unique off-the-grid type experiences that provide a deep emotional resonance with travellers.

WHOLESALE: Adventure World, Momento, Entire Travel Group, Natural Focus Safaris, APT, Ski Max, Travel Associates

DISRUPTORS: Luxury Escapes, Trip A Deal, Inspiring Vacations

RETAIL: Helloworld, Flight Centre, MTA Travel, Phil Hoffman



POPULATION: 128.9 million

AUDIENCE SIZE IN MEXICO:
344,500

**AVERAGE SPEND PER VISITOR
(EXCLUDING AIR):** \$1,792

EQ TRAVEL SEGMENTS:

Authentic Experiences 18-34,
Free Spirits 35-54

Following the removal of the mandatory travel visa requirements, Mexican visitors to Canada increased by 47%. This growth was supported by a significant increase (71%) in direct air access to Canada. In 2018, this growth trend continued, with more than 400,000 Mexican visitors to Canada—an increase of almost 5% year over year. Geopolitical situations between

Mexico and the United States has the potential to create further incentive for Mexicans to forgo travel to the US in favour of Canada. Destination Canada's COVID-19 impact study states that as of September 2020, the tourism export to Canada from Mexico was down 78% or, approximately, \$557 million dollars.

Mexicans prefer to visit Canada in the summer. However, the Northern Lights is the top trip anchor for which Learners 35-64 would be willing to book a trip around. Of potential Mexican visitors to Canada, 12% indicated that they are likely to visit the north. Mexican travellers generally book their travel to Canada within two months of travel time.

TRAVEL TRADE SHOWS:

Focus Mexico 2022

STRATEGY: Mexico is an emerging market for NWT Tourism. We will focus on Mexico media and trade familiarization tours (virtual, if necessary), and market business-to-business. We will support partnered activities with Alberta and Vancouver to enable testing of the market opportunity and to grow our understanding of what can drive Mexican travellers to our destination.

SPECTACULAR
NORTHWEST 
TERRITORIES

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