

SPECTACULAR
NORTHWEST 
TERRITORIES



NORTHWEST TERRITORIES TOURISM

2023/24 MARKETING PLAN





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YELLOWKNIFE SNOWCASTLE. LENORA BARRETT / MWTT

EXECUTIVE SUMMARY

As the world emerges from the COVID-19 pandemic, there has been a significant shift in the tourism landscape. While there is a great deal of optimism that visitation statistics will return to pre-pandemic levels, there are a number of external factors such as rising fuel prices, inflation, political instability, labour shortages and disruptions in airline service that have all created cause for concern and uncertainty for the future of tourism. The reality is that the tourism landscape is experiencing a significant change. In order for the Northwest Territories tourism industry to thrive, it will require strategic thinking and flexibility to adapt to changing consumer travel behaviours and emerging tourism trends.

Some of the major trends that are impacting the tourism sector include reduced transport connectivity, labour and skills shortages, higher costs, product degradation, frictionless travel, a growing importance on domestic travel, nature-based travel and a desire to have an Indigenous connection as part of the travel experience. In response to these changes in the marketplace, NWT Tourism has outlined a number of strategic priorities for marketing tourism in the NWT. These include targeting high value guests, encouraging repeat visitation, growing the domestic and United States markets, leveraging the efforts of our national tourism partners, reducing travel barriers, supporting the destination development work being done by the GNWT and creating more opportunities for tourism businesses to be successful. One of the challenges our industry faces is increased competition as all destinations look for opportunities in a post-pandemic environment.

We have returned to focusing our efforts on domestic and international travellers. We will continue to use direct-to-consumer, travel trade, and media channels. We are also focused on business travel and recovering meetings, conventions and incentive travel (MCIT).

Direct-to-consumer marketing will focus on content marketing across a variety of channels as a way to engage with our target audiences, and using a digital "Always on" approach to ensure the NWT is top of mind with engaged individuals. Travel Trade promotions will focus on building and maintaining relationships with key accounts, and both Trade and Media programs will once again include familiarization tours.

As we promote our spectacular territory to the world, we will continue to lead with our best which always includes connecting the world with our people and the experiences of the North. This encompasses everything from the Midnight Sun to dancing Northern Lights, from authentic Indigenous experiences to iconic adventure experiences, from paddling the infinite waters of the North, to viewing the majestic wildlife and diverse fish species. Through it all, our purpose is to connect our guests with epic Northern journeys and experiences.

NWT Tourism will continue to foster and maintain strategic partnerships that will help us leverage our investments. We continually strive to create new and innovative ways to support the growth of the tourism sector in the NWT as we showcase and share this spectacular territory. NWT Tourism's marketing plan, drafted by the NWT marketing team in collaboration with its partners, is a rolling three year approach that is updated annually and aims to align with the Government of the Northwest Territories, Department of Industry, Tourism and Investments Tourism 2025 Plan.

Connect with us, share your spectacular and we promise something in the Northwest Territories will change you.



Donna Lee Demarcke
CEO NWT Tourism



ABOUT US

Northwest Territories Tourism (NWT) 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 mandate 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 further partners including Parks Canada and Le Conseil de Développement Économique des Territoires du Nord Ouest (CDÉTNO).

NWT Tourism serves over 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, that reflect the varied sectors, regions and appointed directors representing Indigenous governments from across the Northwest Territories. Marketing plans are presented to the board, our members, and funding partners who provide input and feedback on target markets and marketing plans.

NWT Tourism's main office is located in Yellowknife, where we have an experienced team specialized in direct-to-consumer marketing, travel trade, travel media including 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 that include 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.

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.

NORTHWEST TERRITORIES TOURISM

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OUR SPECTACULAR BRAND

The spectacular brand promises visitors a destination to immerse themselves, a world of multi-sensory, surprising and rejuvenating experiences. These experiences leave a visitor forever changed. In a time when 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 building a reputation as an iconic tourism destination. It is the third largest jurisdiction in Canada by area, and one of the smallest by population, resulting in an abundance of wide-open space and lots of spectacular scenery.

The Northwest Territories offers amazing skies, hundreds of lakes and rivers, towering mountains, vast plains, expansive ocean coastlines, and abundant wildlife. Its enormity, geographic diversity, northern location, authentic Indigenous cultures, and friendly people all offer something extraordinary to visitors in a land that grants so many spectacular moments. The Spectacular NWT brand promises a Northwest Territories that gives 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.

SPECTACULAR
NORTHWEST
TERRITORIES

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 keeps close relationships and funding agreements with organizations that share NWT Tourism's interests 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 GNWT is an important partner for NWT Tourism. The department of Industry, Tourism and Investments (ITI) provides core funding for NWT Tourism to carry out their marketing and sales activities. ITI also conducts tourism market research which helps NWT Tourism and our local tourism businesses to make informed marketing decisions. ITI provides product development, training, mentorship and funding programs to support destination development initiatives throughout the territory. NWT Tourism works 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 in the effort to align 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 to 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 (NWTCB). The Bureau works to attract meetings,

events, conferences and business travel 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 not only respond to the financial challenges we face but also 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.





CanNor 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 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, supporting the northern economy by collaborating on the development and promotion of the tourism industry of the Northwest Territories.

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. They also seek 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 collaborate to develop marketing activities highlighting unique Indigenous experiences.

Destination Canada (DC)

The Canadian Tourism Commission operates as Destination Canada (DC) - Canada’s destination

marketing organization (DMO). DC has historically been promoting tourism to Canada in international markets in collaboration with its Canadian tourism industry partners. While always providing pivotal market intelligence and industry data to its partners, DC’s marketing during the pandemic had increased its focus on the domestic tourism economy and on the building of ambassadorships and resilience in the tourism industry. Moving forward NWTT’s work with DC will have a heavy focus on North America and in-particular the USA and Mexico. 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. Destination development and recovering the business and events sector will both be DC supported areas that will be intergal parts in the recovery of the visitor economy of the NWT.

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.

Conseil De Développement Économique Des Territoires Du Nord Ouest (CDÉTNO)

CDÉTNO is a territorial non-profit organization that develops services in support of the economic development and employment of Francophones in the NWT. NWTT works in partnership with CDÉTNO in engaging with the Francophone audience on our French social media page. Previous domestic market research carried out by Environics on behalf of the NWTT, indicates a lack of destination awareness and French-speaking experience providers. 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 activities. Implementation of a French social media strategy will ensure that we capture the attention of this market build destination awareness, and eventually lead Francophones down the marketing funnel to connect with experiences and activities in the NWT.

Industry Partners

The private sector plays a key role in supporting the growth of the tourism industry in the NWT. NWT Tourism has formed strategic partnerships with a variety of businesses such as airlines, accommodations, food and beverage services providers, local tour operators and travel planning services. These businesses support a variety of NWT Tourism marketing initiatives such as offering discounted rates to host trade and media familiarization (FAM) tours, and for contests that are tied to integrated marketing campaigns. These discounted rates allow NWT Tourism to stretch their marketing budget, effectively creating more opportunities to attract visitors to our territory. Local tourism businesses are also a valued source of information on visitation statistics and may share their insights on changes in the marketplace as they occur in real time.

As a way of supporting tourism businesses, NWT Tourism offers a wide variety of collaborative marketing opportunities including discounted rates to participate in consumer travel shows and marketing events as well as digital, print, and social media advertising. Although the cooperative program is built around the tour operator the program also promotes engagement with ancillary organizations such as Parks Canada as well as regional and/or community tourism development offices. Cooperative marketing partnerships are included in NWT Tourism's overall budget, with the goal of building the tourism economy of the NWT.



TULITA BEAR ROCK ANGELA GZOWSK/ NWT

PRODUCT OFFERINGS

The Northwest Territories has a wide range of product offerings that attract visitors from all over the world. These “offerings” include Aurora Viewing, Indigenous/Cultural Tourism, Fishing, Outdoor Adventure, General Touring, Hunting, Visiting Friends and Relatives (VFR) and Business Travel. Each sector makes a significant contribution to the NWT economy and attracts a diverse visitor base that, combined, supports the tourism industry throughout the year. Each sector has its own unique set of strengths, challenges, and needs, which explains why target markets and marketing tactics can differ considerably. The following snapshot is a high-level overview of each sector. *Note - Many statistics are pre-pandemic and research is underway on the post-pandemic/future value of these sectors.





Aurora Viewing

Seasons Offered

- Summer/Fall, Mid-August to Mid-October
- Winter/Spring Late November to Early April
- Peak Aurora Visitation Months (February and September)

Average Length of Stay

- 2 - 4 Nights

Visitation Statistics (2019-2020)

- Number of Visitors: 37,100
- Percentage of total visitors: 31.5%
- Total visitor spend: \$59.80 Million
- Percentage of total visitor spend: 29.2%
- Average spend per trip per visitor: \$1,611.86

Number of NWT Businesses Actively Marketing Aurora Viewing

- Days Trips/Evening Viewing (36)
- Lodge Stays (10)

Target Markets

- Primary - Asia-Pacific, Canada, United States
- Secondary - German-Speaking/Europe, Australia
- Emerging - Mexico

Market Positioning Statement(s)

- World's Best Aurora (highlight reasons why the NWT is the best place to view the Aurora)
- Aurora Capital of the World

Marketing Channels

- Consumer Direct (Canada/United States)
- Travel Trade (International Markets)
- Travel Media (Domestic and International Markets)

Changes in the Marketplace

- Issues with reduced airline capacity will impact the number of visitors to the NWT, especially from international markets
- Slower rebound rate of travel from Asia-Pacific markets
- Labour shortages including foreign workers impacting service delivery

Strategy and adaptations

- Shift to a greater focus on North American residents in Mexico, USA and Canada.
- Develop packages for the high-end (high value travel) market
- Market to high value target audiences in each Market
- Maintain awareness in Asia-Pacific Markets
- Explore new and emerging markets based on air access

Fishing

Seasons Offered

- Primary Season: June-September
- Ice Fishing: December-April



Average Length of Stay

- 5-7 days

Visitation Statistics (2019-2020)

- Number of Visitors: 5,300
- Percentage of total visitors: 4.5%
- Total visitor spend: \$13.7 Million
- Percentage of total visitor spend: 6.7%
- Average spend per trip per visitor: \$2,584.91

Number of NWT Businesses Actively Marketing Fishing

- All Inclusive Lodges (33)
- Housekeeping Lodges (No Food Provided) (9)
- Day Tours (33)

Target Markets

- Primary: Canada, United States
- Secondary: Australia, Mexico and Europe
- Ice fishing for all international markets

Market Positioning Statement(s)

- World's best freshwater fishing
- Trophy fishing/large fish/records
- Clean waters and pristine nature
- Fishing under the Midnight Sun

Marketing Channels

- Consumer Direct (Canada, United States)
- Travel Trade: United States
- Travel Media (Canada and the United States)

Changes in the Marketplace

- Issues with reduced airline capacity
- Economic impacts of inflation/recession

Strategy and adaptations

- Focus on high value guests
- Provide incentives for repeat guests/focus on customer lifetime value (CLV)
- Target markets with the best (most convenient) air access to the NWT





Indigenous Experiences

Seasons Offered	<ul style="list-style-type: none">▪ Year Round
Average Length of Stay	<ul style="list-style-type: none">▪ 1/2 Day to Multi day
Visitation Statistics:	<ul style="list-style-type: none">▪ In the past statistics specific to Indigenous Tourism have not been gathered. Moving forward efforts will be made to gather visitation data specific to Indigenous Tourism.
Number of NWT Businesses Actively Marketing Indigenous Experiences	<ul style="list-style-type: none">▪ Number of Indigenous tourism operators (16)
Target Markets	<ul style="list-style-type: none">▪ Primary: Canada, United States, Germany, France, UK, German Speaking/Europe, Asia-Pacific, Australia▪ Emerging: Mexico
Market Positioning Statement(s)	<ul style="list-style-type: none">▪ Genuine authentic culture and Indigenous experiences▪ Warm and welcoming communities▪ Immersive experiences▪ Part of national focus on reconciliation
Marketing Channels	<ul style="list-style-type: none">▪ Consumer Direct - Canada, United States▪ Travel Trade - International Markets▪ Travel Media - All Markets
Changes in the Marketplace	<ul style="list-style-type: none">▪ Growing interest in connecting with Indigenous cultures▪ Limited number of export ready projects▪ Challenges with limited air access▪ Decline in the economy (inflation, recession)
Strategy and adaptations	<ul style="list-style-type: none">▪ Build Indigenous experiences into package offerings to raise the profile of the sector▪ We support the idea of 'Nothing About us without us', where we work with ITAC and Indigenous tourism operators for marketing Indigenous tourism 'by', rather than 'about', Indigenous people. We work with our communities in a collaborative approach to content development with all involved parties from the beginning.▪ Highlight Indigenous experiences through content▪ Target repeat visitors for extended-stay Indigenous experiences▪ Incorporate Indigenous tourism experiences into Meeting and Incentive Travel (MCIT) request for proposals▪ Support business development in marketing and industry standards through business, market, and export ready training (GNWT).



Outdoor Adventure



Seasons Offered

- Primary season is June-September (paddling, hiking)
- Winter activities are typically sold as an add-on to Aurora viewing packages (dog sledding, snowmobiling, snowshoeing, cross-country skiing)

Average Length of Stay

- Paddling trips typically run between 10-14 days
- Winter activities

Visitation Statistics (2019-2020)

- Number of Visitors: 7,300
- Percentage of total visitors: 6.2%
- Total visitor spend: \$14.4 Million
- Percentage of total visitor spend: 7.0%
- Average spend per trip per visitor: \$1,972.60

Number of NWT Businesses Actively Marketing Outdoor Adventure Activities

- Guided Canoe Trips (11)
- Self-Guided Canoe Trips (6)
- Rafting (2)
- Stand-Up Paddle Board (1)
- *Dog Sledding (17)
- *Snowmobiling (25)
- *Snowshoeing (9)
- Cross Country Skiing (3)

*Including tour operators that contract out the services of licensed tour operators providing these services

Target Markets

- Paddling: Canada, USA, German-Speaking/Europe
- Winter activities: Canada, USA, Asia-Pacific

Market Positioning Statement(s)

- Best paddling in the world (iconic rivers)
- Pristine wilderness
- Authentic winter activities

Marketing Channels

- Consumer Direct - Canada, United States
- Travel Trade - Asia-Pacific, German-Speaking/Europe
- Media - all markets

Changes in the Marketplace

- Increased costs of travel
- Challenges with flight schedules and air capacity
- challenging economic time

Strategy and adaptations

- Focus on high-value guests
- Promote longer trips with built in buffer days for travel into and within the NWT
- Highlight the wide-open spaces as measure of health and safety

Touring



Seasons Offered

- Year round (with most road touring taking place during the summer months)

Average Length of Stay

- 1-2 weeks

Visitation Statistics (2019-2020)

- Number of Visitors: 20,100
- Percentage of total visitors: 17.1%
- Total visitor spend: \$ 20.5 Million
- Percentage of total visitor spend: 10%
- Average spend per trip per visitor: \$1,019.90

Number of NWT Businesses Actively Marketing General Touring

- Vehicle Rentals (7)

Target Markets

- Primary: Canada, United States, German-Speaking/ Europe
- Secondary: Australia, Chinese-Speaking

Market Positioning Statement(s)

- Iconic Highways (Dempster Highway)
- Unique Northern Scenery
- Epic Road Trips

Marketing Channels

- Consumer Direct: Canada, United States
- Travel Trade - German-Speaking/Europe, Australia, Chinese-Speaking
- Media - All markets

Changes in the Marketplace

- Rising fuel costs
- Limited availability of rental vehicles
- Limited supports for Campervans in NWT
- Decline in economy/inflation

Strategy and adaptations

- Target high value guests
- Focus on nearer markets (i.e. Northern Alberta/BC)



Outfitting



Seasons Offered

- Year Round

Average Length of Stay

- 1-2 weeks

Visitation Statistics (2019-2020)

- Number of Visitors: 520
- Percentage of total visitors: 0.4%
- Total visitor spend: \$7.2 Million
- Percentage of total visitor spend: 3.5%
- Average spend per trip per visitor: \$13,846.15

Number of NWT Businesses Actively Marketing Hunting

- Licensed outfitters (18)

Target Markets

- Primary: Canada, United States
- Secondary: German-Speaking/Europe

Market Positioning Statement(s)

- Pristine wilderness
- Unique northern wildlife
- Authentic Indigenous culture

Marketing Channels

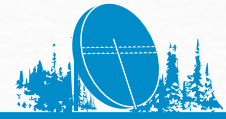
- Consumer Direct - Canada, United States
- Media: Canada, United States

Changes in the Marketplace

- Increased costs of travel
- Limited air access
- Decline in the economy

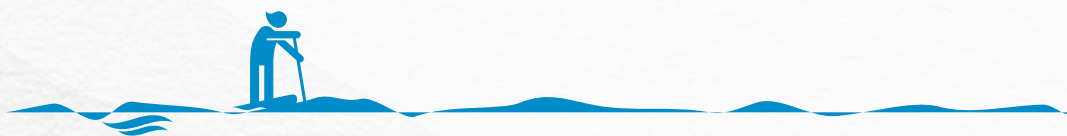
Strategy and adaptations

- As the majority of outfitters are in demand, the strategy will focus on maintaining awareness long term



Visiting Friends and Relatives

Seasons Offered	<ul style="list-style-type: none">▪ Year Round
Average Length of Stay	<ul style="list-style-type: none">▪ 3 days to 1 week
Visitation Statistics (2019-2020)	<ul style="list-style-type: none">▪ Number of Visitors: 15,000▪ Percentage of total visitors: 12.8%▪ Total visitor spend: \$ 10.4 Million▪ Percentage of total visitor spend: 5.1%▪ Average spend per trip per visitor: \$693.33
Number of NWT Businesses Actively Marketing to the VFR Market (offering day tours)	<ul style="list-style-type: none">▪ Community Tours (28)▪ Scenic flight tours (11)▪ Fishing Day Trips (33)▪ Indigenous/Cultural Tours (16)▪ Winter Activity Day Tours (30+)
Target Markets	<ul style="list-style-type: none">▪ Friends and Family of NWT Residents
Market Positioning Statement(s)	<ul style="list-style-type: none">▪ Share your Spectacular▪ Enjoy Spectacular experiences in the NWT as part of your visit with friends and family members living here
Marketing Channels	<ul style="list-style-type: none">▪ Consumer Direct
Changes in the Marketplace	<ul style="list-style-type: none">▪ Increased cost of living▪ Limited flight availability
Strategy and adaptations	<ul style="list-style-type: none">▪ Encourage people to plan their trips in advance▪ Connect with residents to build awareness of the visitor economy



Business Travel



Seasons Offered

- Year Round

Average Length of Stay

- 3-5 days

Visitation Statistics (2019-2020)

- Number of Visitors: 32,300
- Percentage of total visitors: 27.5%
- Total visitor spend: \$78.6 Million
- Percentage of total visitor spend: 38.4%
- Average spend per trip per visitor: \$2,433.44

Number of Communities Actively Promoting Business Travel

- Conferences (3)
- Other business travel (most communities in the NWT)

Target Markets

- Primary: Canada

Market Positioning Statement(s)

- Secondary: USA
- Spectacular meeting locations, unique venues, authentic experiences
- Add a pre or post-vacation trip to your business travel

Marketing Channels

- MCIT: Canada

Changes in the Marketplace

- Significant increase in business travel

Strategy and adaptations

- Focus on air access for domestic and US markets



THE MARKETING ENVIRONMENT

Our assessment of the marketing environment is broken down into two categories. The first category offers a general industry overview of how the tourism industry is performing from global, national, and regional perspectives. The other category takes a closer look at a number of trends that have emerged since the onset of the COVID-19 pandemic, and how these trends will impact how tourism business is conducted moving forward.

Industry Overview

Global

Following a decade of unprecedented year-on-year growth, the global tourism economy experienced losses of epic proportions as a result of the COVID-19 pandemic. The United Nations World Tourism Organization (UNWTO) reported that 2020 and 2021 were the worst years on record since the emergence of tourism statistics back in the 1950s. The UNWTO stated that during 2020 and 2021, international travel and visitor spending was less than 80% of what it was prior to the start of the COVID-19 pandemic. The UNWTO confirmed that during 2020 and 2021, international tourism arrivals and visitor spending were down over 71% from 2019 levels.

Thankfully, with the impacts of COVID-19 decreasing and travel restrictions being loosened, international travel has seen a significant increase in 2022. Tourism destinations around the world hosted almost three times as many international overnight arrivals during the first three months of 2022, resulting in an additional 76 million international arrivals. While this increase is promising, the number of visitors remained 61% below 2019 levels. Although there is cautious optimism that the tourism industry will return to the level of visitation attained in 2019 over the next 4-5 years, there are a number of issues that are cause for concern including health pandemics, economic recessions, labour shortages and global political instability.

Canada

Similar to what was taking place on a global scale, the tourism sector in Canada was hard hit by the COVID-19 pandemic. Leading up to 2020 there was much excitement as the sector was reporting record numbers of visitation and visitor spending. Destination Canada (DC), the national organization responsible for marketing Canada as a tourism destination, reported that in 2019 Canada received 22.1 million overnight arrivals from international markets. This was an increase of 6% from the previous year. Tourism expenditures for 2019 totalled \$82.9 billion CAD, which was a 2.9% increase from the previous year.

Unfortunately, border closures and other COVID-19 related travel restrictions resulted in severe declines for the Canadian tourism sector. Overnight tourism arrivals decreased by 87% in 2020 and 86% in 2021 compared with 2019 levels. The following table is a summary of the overnight arrivals from the key tourism marketing that Destination Canada is active in.

In an effort to mitigate losses, a greater emphasis was placed on local, regional and domestic travel as a way to offset losses from international markets. While this strategy helped to keep many businesses solvent through the crisis, it was not an effective long-term strategy.



Summary of Overnight Arrivals to Canada from 2019 - 2021

Country	2019	2020	% Change	2021	% Change
United States	15.0 M	1.9 M	-87%	2.1 M	-86%
Mexico	487 K	97 K	-80%	86 K	-82%
China	708 K	94 K	-87%	40 K	-94%
Japan	251 K	31 K	-88%	11K	-95%
South Korea	254 K	32 K	-87%	15 K	-94%
Australia	351 K	49 K	-86%	10 K	-97%
United Kingdom	863 K	96 K	-89%	112 K	-87%
Germany	415 K	40 K	-90%	54 K	-87%
France	663 K	96 K	-86%	121 K	-82%

Percentages shown are year-over-year changes compared to 2019

Fortunately, the outlook for the tourism sector in Canada has been showing significant signs of recovery in 2022. During the month of April, Destination Canada reported a total of 720,000 overnight arrivals, compared to only 60,000 during the month of April in 2021. This is a phenomenal increase, but still 47% less than the number of overnight arrivals during April of 2019. There are a number of factors that have supported this increase including reduced travel restrictions related to COVID-19, an improved sentiment towards travel, and pent-up demand.

On the downside, there are several factors unrelated to the COVID-19 pandemic that are impacting the sector's recovery. These include a challenging economic environment driven by inflation and rising interest rates, increased price of fuel, labour shortages and an unstable political environment. The Canadian Broadcasting Corporation (CBC) recently reported on an Angus Reid Poll that stated 56% of Canadians say they can't keep pace with the high cost of living, and are having to make some difficult decisions regarding their discretionary spending. Over 40% of Canadians surveyed said they are delaying major purchases and are driving less, while 32% said they have cancelled or curtailed their travel plans this year. As a result, the tourism sector in Canada will need to be strategic as Businesses compete for business in a market that has been impacted by an unstable economy and rising costs.

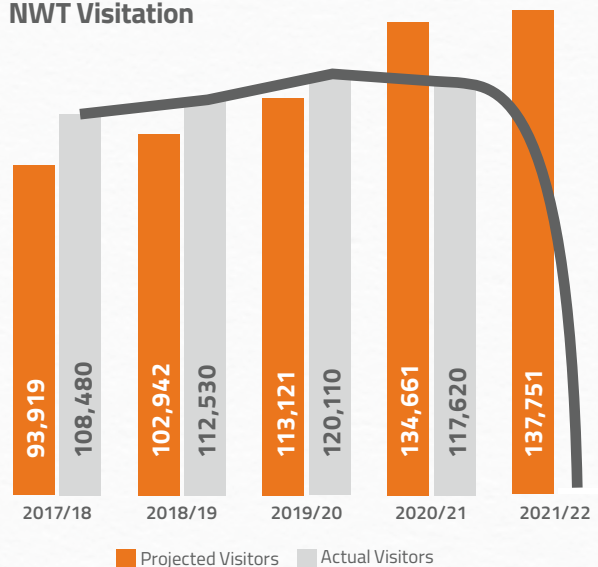
Tourism in the Northwest Territories

Prior to the start of 2020, the tourism sector experienced a period of unprecedented growth. In the 2018/19 fiscal year, the NWT welcomed 87,000 leisure travellers. This was an increase of 58% over the previous five-year average. Visitor spending also reached its top performance to date, with more than \$201.5 million CAD in revenue being generated in 2018-19. This outperformed the target goals that were identified in the Tourism 2020 strategy document by \$50 million.

As the 2020 tourism season began, no one could have predicted the devastating losses the industry would experience as a result of the COVID-19 pandemic. The tourism sector in the NWT was greatly impacted by this crisis. When the Government of the Northwest Territories declared a state of emergency on March 2nd, 2020, the NWT border was closed to non-essential visitors in an effort to keep NWT Residents safe. The NWT border remained closed to visitors until March 2022. As a result of border closures, local tourism businesses were forced to rely on the local market to offset the decline in travel from outside the territory. Unfortunately, with the smaller market base and the apprehension for people to travel (even within their own region) most tourism businesses in the NWT experienced significant financial losses, and some of the businesses were forced to close.

The following chart that was included in the "Northwest Territories Tourism 2020 Year in Review" outlines the significant declines experienced in the 2020/21 fiscal year.

NWT Visitation



Thankfully, the tourism economy in the NWT has experienced a significant increase in the number of visitors since the NWT border reopened for leisure travel. While the official stats of visitation for the 2022 fiscal year will not be available until mid-2023, anecdotal information show that many regions in the NWT are reporting a significant increase in visitation throughout the summer and extending into fall. The Yellowknife Airport reported that it had over 40,000 passengers in June, a number that has not been this high since February 2020. It is assumed that these increases are the result of pent-up demand to travel. However, there is some uncertainty over whether the challenging economic conditions will have an impact on travel to the NWT in the coming years.

Industry Trends

In November of 2021, Destination Canada released the document "Tourism's Big Shift: Key Trends Shaping the Future of Canada's Tourism Industry". The primary purpose of this report is to provide the tourism sector with key insights into how the industry is changing and how tourism businesses can adapt to take advantage of the opportunities that will arise from these trends. These trends have been divided into three categories including macro trends, industry trends and market trends.

Macro Trends

Macro trends focus on the profound socioeconomic changes that affecting businesses and communities on a greater scale. On a macro level, Destination Canada has identified five key drivers that will impact Canadian society as a whole and will affect the tourism industry in both the short and long term.

COVID Uncertainty

As governments and industry partners around the world focus on mitigating the spread of COVID-19, greater emphasis will be on practical tools and measures that help limit the spread of the virus. Booking behavior will strongly be influenced by perceived health and hygiene practices of a destination, as well as how a Country is assessed/perceived in regards to/when

managing the pandemic. Canada's high vaccination levels combined with our unique nature-related experiences may provide a competitive advantage in this challenging operating environment.

Economic Change

As a result of restricted spending opportunities during the pandemic, household savings in many developed countries is at an all-time high. As travel restrictions were lifted, North America has witnessed an accelerating increase in spending across multiple income tiers. During this same period, prices for airline bookings, hotel stays, food and car rentals have soared in response to inflation and supply chain issues. The balance between income and price increases will determine overall travel demand and will most likely result in a focus on higher yield guests.

Social Change

One of the underlying factors of the pandemic was that it exposed systemic racism and structural inequalities around the globe. As a result, there is a newfound awareness to provide a catalyst for real change and to work towards reconciliation. Canadian tourism has a renewed sense of commitment to Indigenous communities and the visitors that are eager to connect with them.

Climate Change

As part of a commitment made by corporations worldwide to curb travel-related emissions, there will be a reduction in business travel. This will be achieved by limiting trip frequency and by relying more on online meetings while optimizing schedules to reduce the number of flights taken. The climate crisis has also increased the number of extreme weather events such as fires, floods, and debilitating heat waves. (Environmental) Calamities such as these have had a negative impact on the industry with soaring insurance premiums for operators in high-risk areas. This has resulted in heightened operating costs, which have to be passed on to the consumer. As extreme weather becomes more frequent, there will be an elevated concern for consumers, and could result in a reluctance to travel.



Accelerated Digitization

As a result of the COVID-19 pandemic, digital technologies have increasingly been adopted when managing customer and supply chain interactions. . Geo-targeting and near-real time data can be used in the decision-making process. This data will give destinations a greater understanding of their visitors and could help them to be more strategic. Advertisers will need to have a more sophisticated approach focused on engaging content and brand promise.

Key Industry Trends

There are a number of trends that will impact the tourism sector. The following trends were identified by Destination Canada through interviews with inbound and outbound tourism stakeholders. Monitoring and adapting to these trends will help minimize risks and maximize market opportunities.

Lack of Access & Reduced Transport Connectivity

The change in airline economics has resulted in a significant decline in air capacity. Reduced frequency on routes within Canada and key international destinations will have a profound impact on the sector's recovery. Access to ground transportation is also becoming increasingly limited across the country, with many rental car companies being forced to reduce their fleets and reshape customer expectations regarding availability and price. In the short term, the current economic climate will delay the reopening of airline routes and will impact the cost and ease of travel.

Labour & Skills Shortage

Recruiting, training, and retaining staff has been an ongoing challenge for the tourism industry. This issue has been magnified by the COVID-19 pandemic, as many workers left the industry due to lack of employment prospects, and chose not to return to the sector as they found more stable employment in other industries. This diminished workforce will be a major challenge for the sector's recovery across all hierarchy levels.



NORMAN WELLS HANS PFAFF / NWTT

Higher Costs

The current consumer demand for travel, coupled with reduced supply and capacity and rising fuel prices, have resulted in a significant increase in travel cost. In many cases, both airline and accommodation prices have surpassed what they were in 2019.

Reduced Business Travel

The corporate travel sector is facing a much slower recovery than leisure travel. The pandemic has reshaped how business is conducted, and there is a greater reliance on connecting with business colleagues remotely. Destination Canada has estimated that business travel will only recover to about 80% of pre-pandemic levels by 2024.

Product Degradation

As a result of the pandemic, financial reserves and access to capital from most tourism businesses is extremely limited. As many providers have had to drastically scale back on their business operations and services, there has been a decline in the quality of experience delivered. This will have a long-term effect on the quality of tourism products in Canada, and in the long term this could deteriorate travel experiences, and gradually damage a destination's reputation.

Reduced Access to Capital & Limited Liquidity

The COVID-19 pandemic has created an additional strain on tourism and hospitality businesses that were already struggling with rising debt. Since the onset of the pandemic, capital assets are at an all time low, with cash being directed towards supporting the survival of ongoing operations. There has been a significant uptake of the programs governments have put in place to help businesses access capital.

Key Market Trends

Over the past two years there has been a transformational shift in consumer behaviours and values. Understanding these shifts can better prepare businesses to adapt to these changes, enhance product development and service channels, and make the best decisions related to their marketing budgets.

Frictionless Travel

As the industry has emerged from the pandemic, travel has become more complicated. Even seasoned travellers are struggling with the ever-changing travel regulations and testing requirements. Travellers are looking for more assistance through digital services and human interactions as they navigate their travel experience. The goal for tourism destinations, and the tourism businesses that operate within them, is to help remove the pain points associated with travel, and put visitors' needs front and centre.

Domestic Travel

With a growing uncertainty and uneasiness towards international travel, Canadians are taking more trips within their own regions. While typically not being as big spenders as international travellers, they have the potential to be repeat customers and to act as ambassadors for the destination.

Responsible Travel

The pandemic has also brought a shift in how people travel. There is a desire to connect with the destination in a meaningful way, while also being respectful of the environment and the local culture. Changes to travel behaviour translate into traveling less, but for longer and more immersive experiences. Many travellers want to reduce their carbon footprint and provide economic and social benefits to the host community.

Ascendance of Communities

Destinations are taking a closer look at how tourism is delivered in their region, making sure to find a balance between economic benefits while minimizing pressure on community resources. Moving forward, the long-term focus will be on more sustainable goals to ensure quality of life for residents living in the region.

Indigenous Connection

Indigenous experiences are continuing to grow in popularity with both domestic and international travellers. The desire of travellers is to have a meaningful connection with Indigenous people and to ensure that the communities they are visiting are benefiting from their visit. While Indigenous tourism has a huge potential for growth, it was one of the hardest hit sectors and will require support for businesses to recover from the pandemic to meet growing demand.

Wild for Wilderness

As the world emerges from the pandemic, there has been a greater appetite for wide open spaces and wilderness travel. This has driven visitation to National Parks and other nature-based destinations. Since Canada is known as a place that offers outstanding wilderness adventures, there is an opportunity to capitalize on this trend.

Health & Wellbeing

The past two years have also seen a significant shift towards wellbeing and personal enrichment. There is a greater focus on escape, rejuvenation, and nature-based healthfulness as part of the travel experience. There is an opportunity for destinations to capitalize on this trend and to define it on their own terms.



RISK ASSESSMENT AND MITIGATION

The following risk assessment takes into consideration a number of factors that may impact the tourism sector in the NWT. The assessment begins by looking at the competitive advantages and challenges the tourism industry in the NWT faces. This is followed by a risk assessment that takes a closer look at how the changes in the marketplace pose a risk to the tourism industry in the NWT. It also looks at how NWT Tourism and our industry partners may be able to reduce some of these mitigating circumstances through advocacy and strategic marketing initiatives.

Competitive Advantages

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 operating 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 structure make it agile, flexible, and adaptable. The Spectacular brand is a genuine one that represents the NWT with authentic and unique storytelling.

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 scientifically supported 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. 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 visitors with the opportunity to enjoy a variety of iconic wilderness experiences in a setting that is truly uncrowded.

Reputation for Being a Health and Safety Conscious Destination

Throughout the COVID-19 pandemic, NWT Tourism and our industry partners adhered to the strict health and safety protocols outlined by the Chief Public Health Officer. The NWT has built a reputation as being a destination that focuses on the health and safety of its residents and of those visiting the territory. As a result, there is a far greater likelihood that people will feel significantly more at ease to travel to the NWT than to other destinations that did not follow strict health and safety protocols throughout the pandemic.

Authentic Indigenous Experiences

As the desire for travellers to connect with Indigenous cultures and communities grows, the NWT is well-positioned to connect travellers with genuine Indigenous culture. The Indigenous culture in the NWT is unique to Canada's North and there are a wide range of cultures and languages through each region of the NWT, making it an ideal place to visit for travelers seeking authentic Indigenous experiences. Community-based tourism operations are constantly emerging, and experiences range from outdoor adventure to culinary, offering visitors a real connection to the land and to the people of the NWT.

We Are More Connected to Industry Partners

Relationships have always been important and an element we rely on for success. NWTT's network of members across the regions has never been more central as a collective voice. The growth of the tourism industry relies on strong cooperation between like-minded partners. NWT Tourism enjoys a secure and durable relationship founded on trust and respect with the Government of the Northwest Territories, which provides core funding. NWT Tourism 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 done within the tourism industry.

Digital Innovation

NWT Tourism has embraced innovative digital marketing, monitoring 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 a sound knowledge of our destination. With over 85,000 mentions, the hashtag #SpectacularNWT is widely used by residents and travellers alike, and user-generated content continues to populate NWTT social media channels. The SpectacularNWT website is diverse and robust. While always offering opportunities for improvement, it is comparable on an international DMO stage.

This content strategy has served to advance fantastic success in search engine optimization (SEO) and search engine marketing (SEM) – an asset we will continue to build on.

Industry Challenges

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 compared to other competing destinations. This cost barrier is particularly the case when considering a journey beyond Yellowknife, and 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, the domestic consumer's 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 and airlines have not been able to support the required routes to recovery visitation in key months of the year. This threat is detailed further below.

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 unique high end 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.



LITTLE DOCTON LAKE: DARREN ROBERTS / NWTT

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, they focus on working in their business. In a digital world, these legendary experiences need to be found before they can be/being enjoyed. There is a concrete/solid opportunity to have a much stronger digital presence. COVID-19 has catalyzed the adoption of technologies and customer digitization. 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 in the tourism workforce questioning the security of a career in the tourism industry. Hiring the necessary workforce has always been a challenge for many businesses in the North, long before the job losses caused by the pandemic. Although this is not a new problem, it may represent one of the largest challenges for the recovery of the industry. The Great Resignation of 2021, which saw 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 insights into these problems in an effort to provide solutions / support in finding solutions.

Perceived Risks

The following table is an analysis of the perceived risk that the tourism industry in the NWT may face over the next few years, as well as some suggestions on how these risks could be mitigated.

Risk Description	Impact on the Industry	Mitigation of Impact
Another wave of virus or pandemic	Increased travel restrictions, possible border closures, reduced travel (particularly from international markets)	<ul style="list-style-type: none"> ▪ Focus more on domestic and local travel ▪ Provide most recent and up to date travel information on NWT website
Ongoing flight issues (reduced flights, baggage issues)	Reduced air capacity for travel to NWT, disruptions in flight and baggage issues	<ul style="list-style-type: none"> ▪ Work with Airlines for solutions and partnerships ▪ Focus on high value guests ▪ Build buffers into travel packages to compensate for travel disruptions ▪ Increase road travel yield
Rising Inflation, economic challenges	<p>High costs reduce the number of people that can afford travel to NWT</p> <p>Increased fuel costs will reduce the number of road travellers</p>	<ul style="list-style-type: none"> ▪ Focus on high value guests ▪ Target near in markets for road trippers (Northern BC/AB) ▪ Build packages that support Free Independent Travelers (F.I.T)
Labour shortages	<p>Reduced products and services available in the NWT</p> <p>Some businesses are forced to close or operate with limited hours</p>	<ul style="list-style-type: none"> ▪ Advocate for foreign workers ▪ Focus on high value guests ▪ Promote the NWT as a great place to live and play.
Climate Change	<p>Climate change causes disruption to travel services</p> <p>NWT affected by climate change related disasters such as forest fires and floods</p>	<ul style="list-style-type: none"> ▪ Focus on high-value guests ▪ Provide clear and up-to-date information on any natural disasters to ensure visitors are informed and can adjust their travel plans accordingly
Domestic Competition	Potential visitors choose to travel to destinations in Canada that offer similar experiences at lower prices	<ul style="list-style-type: none"> ▪ Promote the unique aspects of the NWT ▪ Focus on high-value guests ▪ Focus on repeat travellers and customer lifetime value (CLV)
Aging Infrastructure	Tourism operators are not able to maintain the quality of their businesses as a result of rising costs and a reduction in visitors	<ul style="list-style-type: none"> ▪ Advocate on behalf of industry to ensure they are receiving adequate support to maintain/upgrade their business infrastructure
Welcomeness of Residents	Certain communities in the NWT may be reluctant to welcome visitors into their communities	<ul style="list-style-type: none"> ▪ Conduct local promotional campaigns to ensure locals are aware of the value of tourism ▪ Build packages around the communities that are open to receiving visitors

STRATEGIC PRIORITIES

In response to the changes in the tourism environment, Northwest Territories Tourism has identified the following strategic priorities. The intent of these strategic priorities is first of all to help offset the losses that the tourism industry in the NWT may experience/encounter as a result of changing economic conditions, reduced flight capacity, labour shortages, and secondly to position the sector for long-term success.

Target the Right Travellers

We need to attract the right guests for our members, and that means appealing to the NWT lovers, the visitors that communities love to host. These are the guests who love the NWT and the guests that communities love to host. These guests bring positive outcomes and are aware of their impact on a destination. These are the best guests; these are our high value guests, who also match our target segments (Appendix B). With rising costs and the current tourism industry supply issues including the reduced flight schedules, the number of people who can afford to or have access to travel will be considerably reduced. To help mitigate the situation, NWT Tourism will identify and target high-value guests who have interest in NWT products. They have the financial means to travel to the NWT spend more time in the territory. The goal is to increase yield, with higher average visitor spend to mitigate the lower number of visitors to each region and the higher cost(s) of operations. The best way to attract these guests is often through word of mouth. It starts with travel trade and industry partners, which is why it is crucial that residents become Spectacular ambassadors.

Encourage Repeat Visitation

As the tourism products offered in the NWT are both iconic and diverse, there is an excellent opportunity to encourage visitors to return to our territory time and time again to be enriched by the experiences available to them. People who have travelled to the NWT at least once have a far greater understanding of and appreciation for the territory. They are familiar with the

logistics involved with travel to and within the region, and know what to expect in terms of amenities and level of service. It is more cost-effective to attract repeat visitors than it is to convert new customers. There is an opportunity for a greater return on investment by focusing on Customer Lifetime Value (CLV), and by creating special programs and incentives to target repeat visitors. This will prompt past visitors to promote the NWT to their family, friends, and colleagues through word-of-mouth.

Build off the Spectacular Brand to Grow the Domestic and United States Markets

Since the launch of the Spectacular Northwest Territories brand in 2006, there has been a significant increase in destination awareness and interest in the NWT, particularly within Canada and certain areas of the United States. As it is expected that overseas visitation will take longer to recover, it will be important to offset these losses through increased travel from Canada and the United States. Promotions in these regions will focus on our iconic products including Aurora, fishing, paddling, and road touring, and will incorporate Indigenous tourism experiences to add to the authenticity of a vacation to the Spectacular Northwest Territories. NWT Tourism will focus on creating opportunities for guests from our targeted marketing efforts to engage in our brand and visit the NWT.



Leverage the Marketing Efforts of our National Tourism Partners

As our national partners, Destination Canada (DC) and the Indigenous Tourism Association of Canada (ITAC) have helped raise the profile of Canada (and its regions) in the international markets they are active in, NWT Tourism will continue to benefit from aligning our international marketing efforts with these organizations. NWT Tourism will continue to participate in trade shows, sales calls and cooperative marketing activities that are made available through these organizations. As growing the USA market is a top priority for NWT Tourism, we will explore what marketing initiatives align with the goals we hope to achieve in the USA market.

Reduce Travel Barriers by Simplifying Travel to and Within the NWT

As we emerge from the pandemic, travel has become far more complicated and stressful. With travel regulations frequently changing, flight cancellations and lost luggage becoming increasingly problematic, there is an apprehension for people to travel, especially to destinations that are less known and/or require multiple flights. Unstable weather conditions can further complicate travel logistics for people visiting remote regions of the NWT. To help lessen the impacts of these issues, NWT Tourism will provide clear communication on any changes in travel regulations. It will support the development of tourism packages to simplify travel and encourage visitors to build in buffer days for travel into and within the NWT. NWT Tourism will also encourage visitors to connect with northernmost hosts and local travel planning services that can help visitors navigate through the complexities of travel in a post- pandemic world. This will include efforts in reducing digital friction and managing expectations associated with travelling in the northern environment.

Employ a Diversified Approach to Marketing the Territory

NWT Tourism recognizes that each of the sectors that make up the tourism industry in the NWT has its own unique set of challenges and opportunities. In an effort to support our tourism operators to the fullest capacity, NWT Tourism will outline specific tactics that are tailored

to the needs of each sector. While each of the sectors will be included in the general awareness marketing activities undertaken by the association, adopting specific actions targeted to each sector will ensure that all needs are properly supported.

Support the GNWT's Destination Development Efforts

As part of the GNWT's role in supporting the tourism sector in the NWT, the department of Industry, Tourism and Investment (ITI) provides a number of services to new and existing tourism businesses to help them achieve long-term success. These includes funding support, training, strategic advice, and business development support. As a result of this support, a variety of new or enhanced tourism products and services are developed each year. NWT Tourism is committed to aligning messaging and marketing efforts in support of any new products that have been developed. This will include ongoing communications with Government of the Northwest Territories- Department of Industry, Tourism and Investment (GNWT/ITI) to learn about the destination development activities taking place in the regions. We will continue to share insights on the emerging industry trends that may help guide GNWT/ITI's destination development efforts.

Create More Opportunities for Tourism Businesses to be Successful

The tourism industry in the NWT is made up of a large number of businesses providing a wide-range of products, services, and experiences. The level of business readiness also covers a wide spectrum. Some businesses (particularly new business start-ups) do not meet all the requirements to be considered business-ready or market-ready. Others are seasoned tourism businesses that are already selling their products and services to the international markets (export ready). NWT Tourism recognizes that not all tourism businesses will have the capacity or interest in becoming export-ready. As part of our marketing strategy, NWT Tourism will look to create business opportunities for all levels of readiness. This will be accomplished by marketing these businesses to the appropriate target audiences. Strategies include the promotion of self-guided



HAY RIVER WATERFALL COLIN FIELD / NWT

experiences to resident and the visiting friends and relatives (VFR), to promote market-ready packages to Free and Independent Travelers (FIT) and export-ready packages through media and the travel trade.

Keep the NWT Top of Mind

As we weather the storm of the COVID-19 pandemic and adapt to the changes in the marketplace, NWT Tourism recognizes the need to ensure that our spectacular destination remains top of mind for people planning on travelling to the NWT in the immediate future, or for those who plan on visiting at a later date. To achieve this, NWT Tourism will continue to use an Always On approach through strategic digital, social and content marketing to attract visitors and ensure that the NWT remains a dream destination for longer-term travellers. While NWT Tourism anticipates that international travel will take longer to match visitation levels prior to COVID-19, we understand that the travel trade and media distribution channels are relationship-based. To maintain our relationships with our key trade and media partners, we continue to participate in trade shows, support trade co-ops that are mutually

beneficial, and train travel agents through virtual and in-person sessions. Also, and most importantly, we aim to re-establish the frequency of our trade and media familiarization (FAM) tour programs.

Utilize Sound, Timely Research and Data to Guide Marketing Decisions

To ensure we are achieving the best ROI in our marketing budget, it is imperative we make decisions based on sound and timely research. NWT Tourism will work closely with ITI, DC and ITAC to obtain the latest visitor statistics and industry research to ensure our decisions are based on the most recent research data. We will also continue to establish key performance indicators (KPIs) for all of our marketing activities and report on these KPIs on an ongoing basis in order to adjust our marketing efforts where required. A primary focus will be to ensure the use of first party data (mainly postal codes) and to encourage all visitor information centres throughout the NWT to collect data digitally so that it can be shared with NWT Tourism as well as our industry partners in real time where possible.

TARGETING OUR MARKETS

NNWT 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 and changes in economic conditions. While markets remain geographic, we strive to connect with like-minded travellers by repurposing content across markets, and to communicate with individuals on the basis of interests and media consumption. In an ever-changing world, we will need to continually assess the situation and adapt our strategy accordingly.

Since the NWT Border restrictions were lifted, the focus has shifted from the local NWT market back to Canada, the United States, and our key overseas markets. 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. For overseas markets our General Sales Agents (GSAs) are contracted to help us understand and attract audiences from around the world.

Research on post-pandemic traveller behaviour is underway and NWTT will use this analytical data to target our marketing activities to the best audience possible. While pre-pandemic visitors tended to be over the age of fifty (50), a broader audience is a logical choice as NWT aims to dial into the functional (business traveller) and emotional marketing of target audiences in target markets. We are broadly targeting Canadian Residents aged 35–65). Research will 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, along with their motivations, and their media habits, which allows us to ensure our marketing decisions are data driven. Appendix B shows 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 called Explorer Quotient (EQ), based on travel values. This method was employed 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 value-based segmentation for today's digital marketers. EQ segmentation data cover 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 with 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 more of an independent experience while at a destination, choosing to have control over their itineraries and schedules. Authentic Experiencers are looking for authentic, tangible engagement with the destinations they visit, and have a particular interest in understanding the history of the places they visit.



PADDLING ON THE SLANE RIVER RAPIDS DARREN ROBERTS / WWW.TT

Cultural Explorers are avid travellers who value learning and discovery while travelling. They don't want to feel like a typical 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 collects census data as its base and then enhances it with dozens of other authoritative data sources. It classifies every Canadian household into one of 68 segments reflecting current demographics, lifestyles and values.

Deeper than demographic insights, PRIZM allows for an understanding of 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 territory. 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.

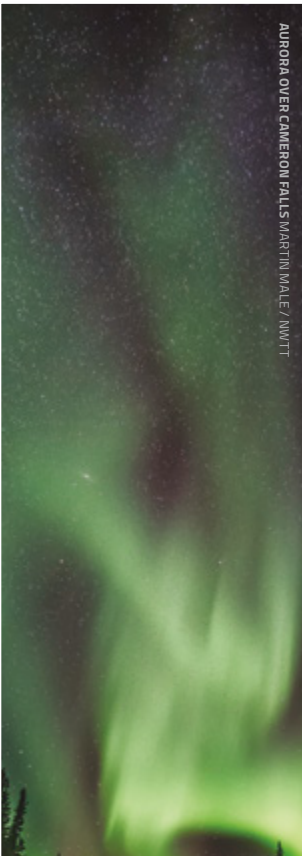
Keeping Connected

Geographic markets are the areas we send our messages to and represent the areas we hope to attract visitors to the NWT from. NWTT 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. These markets also rely on air access and the marketing activities need to align and focus on geographic areas with air access.

For more information on these markets and target audiences, please 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 multiple variables in our target markets and working with partners to track changes in the markets is pivotal when welcoming visitors back to the NWT. We assist our members in the process of targeting the right audiences for their businesses and communities.



AURORA WATCHING IN TULITA ANGELA GZOWSK / NWTT



AURORA OVER CAMERON FALLS MARTIN MALE / NWTT



VIRGINIA FALLS ANGELA GZOWSKI / NWTT



JEAN MARIE RIVER ARTS AND CRAFTS BEN WEILAND / NWTT



FORT SIMPSON TEEPEE BEN WEILAND / NWTT

2023/24 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 to rely on when moving through the calendar of marketing activities. This plan can be shared to show partners planned actions toward marketing the NWT. As we closely monitor the tourism environment, it is evident that the tourism industry is changing rapidly. NWTT must plan to be flexible in the face of this changing 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, our goal has not changed; focusing on the tourism industry's 'growth' now implies growth from the ground up, rebuilding the tourism economy. 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 sustainable economic development of the NWT.

Objectives

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

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 work towards the following eight objectives:

1. Grow tourism visitation and tourism-related expenditure in the NWT.
2. Expand destination and brand awareness of the NWT.
3. Encourage regional distribution of the visitor economy 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 and high engagement in media marketing channels - earned, paid, shared, and owned.
7. Build awareness of the NWT, develop relationships, instill resilience, and support 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 KPIs as the gauge to confirm success, milestones 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 strive for in the marketing plan include:

- Maintaining brand awareness for SpectacularNWT in key markets and expand secondary markets.
- Measuring and maintaining audience quality and engagement rates.
- Measuring and building owned content engagement.
- Establishing benchmarks for earned media value.
- Monitoring and tracking results for paid media KPIs.
- Increasing social media engagement and building followers on new platforms.
- Video engagement and follower growth.
- Increasing the number of subscribers of SpectacularNWT E-Newsletter.
- Attracting MCIT Events to each region of the NWT.
- Establishing website landing content for all primary markets and sectors.
- Working with partners to establish benchmarks for visitation and expenditure post-COVID-19.

Marketing Channels

NWT Tourism approaches our marketing through four key distribution channels:



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 helps develop local visitor economies. 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, or other content aimed to spark interest and engage an individual online. There is normally a call to action to then go further and click on a link to a member listing, jump-off to member websites, or engage in a phone call with a member.

The consumer distribution channel remains the largest focus of our marketing efforts. The primary consumer target is potential visitors from the whole of 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. Residents know the NWT is a place of spectacular beauty brimming with adventure. We aim to build 'SpectacularNWT' brand ambassadorship and encourage storytellers to share the spectacular NWT with friends, family and anyone who seems like they might enjoy it up here.

Media

One of the most effective ways to increase destination awareness is through paid, earned, and owned media channels. This is where people spend their time; searching, exploring, reading, watching and listening to stories of what might be their next travel adventure. In the past, NWTT has highly prioritized 'travel media', and while this remains a priority (now), NWTT now approaches the media in a holistic model known as PESO (Paid, Earned, Social, & Owned).



HAY RIVER GOLFING COLIN FIELD / NWTT

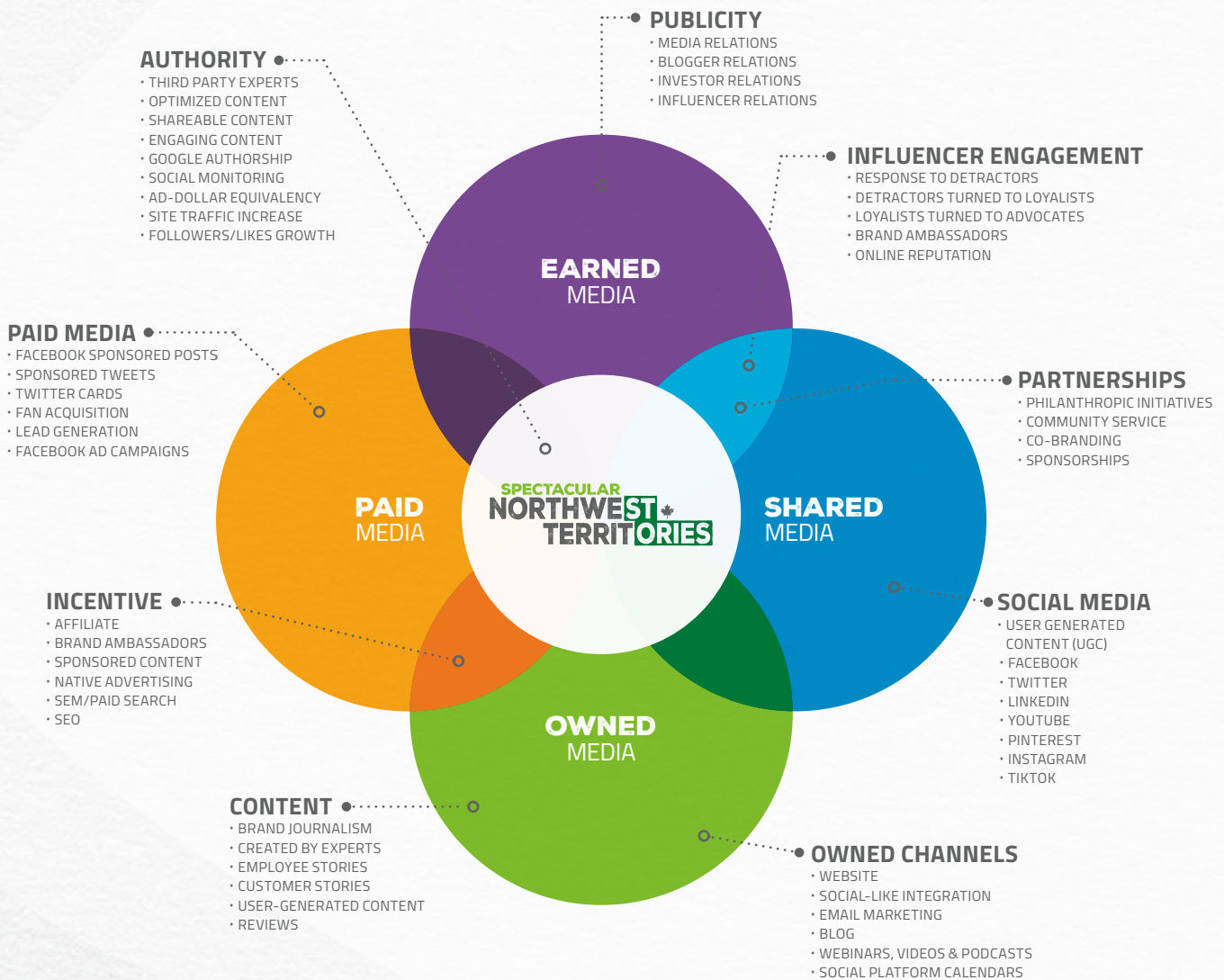
Owned media is when we create content and share it with our consumers organically on unpaid channels. This includes stories and other pages on the SpectacularNWT website and original content on our social media channels.

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. Earned media often 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 a reader. However, the destination often has little to no control over what is said or when it will be published.

Paid media is when we pay for our content or to have content developed 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 where people are not already exposed to our content. The benefit of paid media is that the destination controls the message, the target audience, and for how long it 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 to retain and build the earned media ad value we have managed to build.



ADAPTED FROM: GINI DIETRICH, SPINSUCKS ©

Shared Media

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 with our GSA partners on international channels. NWTT must keep its online presence consistent and “on brand” across all of our platforms. The main objective for all social media channels is to increase brand awareness and engagement and measure click-throughs to shared content.

Travel Trade

Without travel trade, travel virtually stops. The travel ecosystem is an intriguing web of airlines, travel agents, online travel Agents (OTAs), booking agents, wholesale agents, bookable experiences, hotels and much more. The travel trade is mainly the intermediary and liaison organizations between travellers and tourism suppliers. These organizations include tour operators, regional tour operators (RTOs), wholesalers and travel agents. These groups all promote and sell to North American and overseas markets and create an essential link between tourism suppliers and potential customers. Working with the travel trade requires tourism suppliers to contribute commissions. Rates vary and are negotiated from around 10% for direct retail agents in Canada and the USA, to around 20% for longer haul markets like the UK, Australia, Japan and China, and even higher when working with a wholesaler or global receptive. A portion of commissions often go towards the marketing of the destination in the tour operators distribution systems.

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 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)

The MCIT channel targets a different type of demographic altogether. This channel is composed 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 remotely and in person), 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, spending more on average per visit than any other visitor, and the growth of bleisure is an essential consideration in this channel. They are the most technologically savvy, socially driven, shared economy, savvy and smart travellers in the world today. There is 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 and event-related groups.

Marketing Strategies and Tactics

NWT Tourism uses data and research insights to determine the right core strategies and associated tactics. By identifying channels where we can target primary, secondary, and emerging geographic markets we take a 'full funnel approach'. Customer segments are identified, and with a NWT Tourism sector in mind, marketing activity is undertaken that aims to bring potential visitors into the digital marketing funnel (opposite page). As we bring consumers through the phases of 'awareness' and then 'engage' them we strive to build a 'desire' to travel to the NWT. Eventually we offer a call-to-action (CTA) that encourages the user to 'evaluate' a trip to the NWT and ideally begin a conversation with our members.

Integrated Marketing

The aim is to bring the strategic components together in an integrated marketing approach. Content is developed 'on-brand' with audiences in mind and our best experiences and attractions are marketed to this audience directly or where they engage with media. While markets and channels vary, tactics employed will be integrated across all channels and markets wherever possible. We ensure there is consistent messaging and branding throughout our marketing and that content and collateral is being shared widely and re-purposed to amplify our marketing efforts. This ensures the best return on investment (ROI) for our budget.

Marketing activities focus on six strategic areas:

- Brand Ambassadorship and the continual upholding and enhancement of the Spectacular NWT brand.
- "Always-On" marketing strategy to meet people where they are searching, reading or scrolling.
- Content marketing to share the spectacular and tell stories that engage our audiences.
- Leading with our best experiences and unique NWT attractions.
- Working together with partners for maximum impact and shared success.
- Data-driven marketing and results-driven 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.

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.

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, NWTT updates its brand visual assets every 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 the 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 change you.

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.

NWTT continues to increase the budget in these areas to allow for increased asset acquisition. This will fill the gaps in our content library and continue to provide fresh and exciting NWT content. International photographers, videographers and visiting travel media can also provide content. Additionally, by monitoring #SpectacularNWT for UGC, NWTT tracks shares of Spectacular content. It continues to be invested in NWT-based content creators and works hard on developing long-term relationships with the northern photo and video community if the subject is still NWTT.

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 evoking 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 for images to be bright, warm, and awe-inspiring.

The visuals NWT Tourism pursues go further than just capturing a great image or video – they also tell a story, educate and inspire. The content NWT Tourism acquires and creates captures the viewers, making them wish that they were here. Spectacular brand content tells a story and conveys emotion, as well as a sense of uniqueness belonging to this place. Photography that often performs best includes images captured in the first person, with a focus on an individual who is in-frame, and a spectacular landscape in the background.



SLAVE RIVER RAPIDS JASON VAN BRUGGEN / NWT

2. Digital: Always On

Every trip today begins online. Whether it be through inspiring Instagram photos that ignite the mind movie, or by watching, reading, or looking up itineraries, the Internet 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 fueled 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 constant monitoring, we shifted programmatic advertising to a strategic list of content providers and specific audiences with great results which continue to validate the strategy.

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 - to engaging the user through their preferred content thereby 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 2023/24, NWTT will continue to transform marketing online for improved reach and effectiveness. NWTT will consider digital evolutions and extensions of existing tools such as the Spectacular Guide, email distribution and of how we tell our stories by employing more video storytelling. We will continue to embrace social in everything we do, by focusing what makes 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 'first-party 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 have been affected by the pandemic. It is not always appropriate to ask consumers to 'book now.' Therefore, we use creative language to connect with 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

The primary tactical approaches employed for social media 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, and sharing content, and by interacting with followers every day on all social media channels.

We aim to have an engaged conversation with followers including residents and both past and potential visitors to the NWT.

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 purpose - 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 delivers value by answering the audience's questions, educating them on the destination, and bringing them further down the funnel toward a conversion. Through content marketing, NWTT can build trust with the audience, add value, and emotionally connect with potential visitors 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 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 act. 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 for themselves.

Results-based Content Development

Knowing what content audiences are seeking online is key to ensuring NWT 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 assess 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 emphasize, 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 Optimization (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 tags for all images and videos on the website.

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

- Ensuring that searchable keywords appear on all pages.
- Ensuring that the keyword 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 videos whenever possible.
- Ensuring that descriptions, image captions and alternative text for images appear.

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, right now 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. We aim to help visitors connect to culture while, in line with our strategy, highlighting all regions of the NWT. We will lead with our best marketing and trade-ready regional products. Our marketing is research-based and consumer-driven-content. 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 directing a strong focus on 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 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 is 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 confirms that Indigenous experiences are 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. There is an increased desire both domestically and across the globe to travel with purpose. This includes discovering different cultures 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, from the mountains to the Mackenzie, the rivers in the NWT are truly spectacular. The waterways are a key feature of what makes the 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 the amazing opportunities to see them in the wild. We promote the diversity of fish species and, through marketing, share unique stories about them and what we believe – that the best fishing is up here.

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 organizations where both organizations 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.

6. Research: Strengthen How Research and Results Drive Decision-making

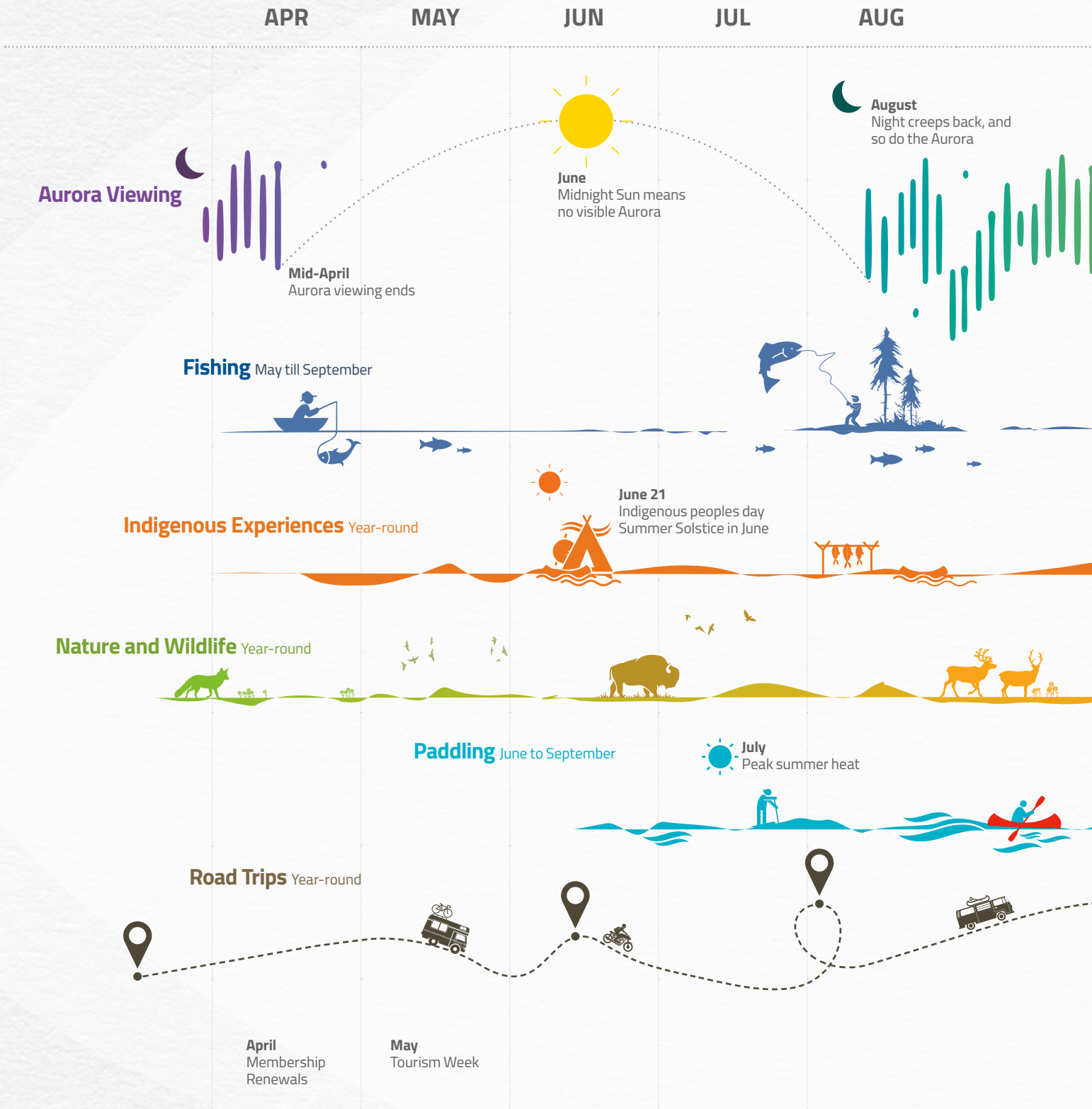
Marketing strategy relies on timely research which is planned, implemented, reviewed, and interpreted with key partners to underpin marketing success. This guides marketing messaging, timing, and tactics.

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 in real time.

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.



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

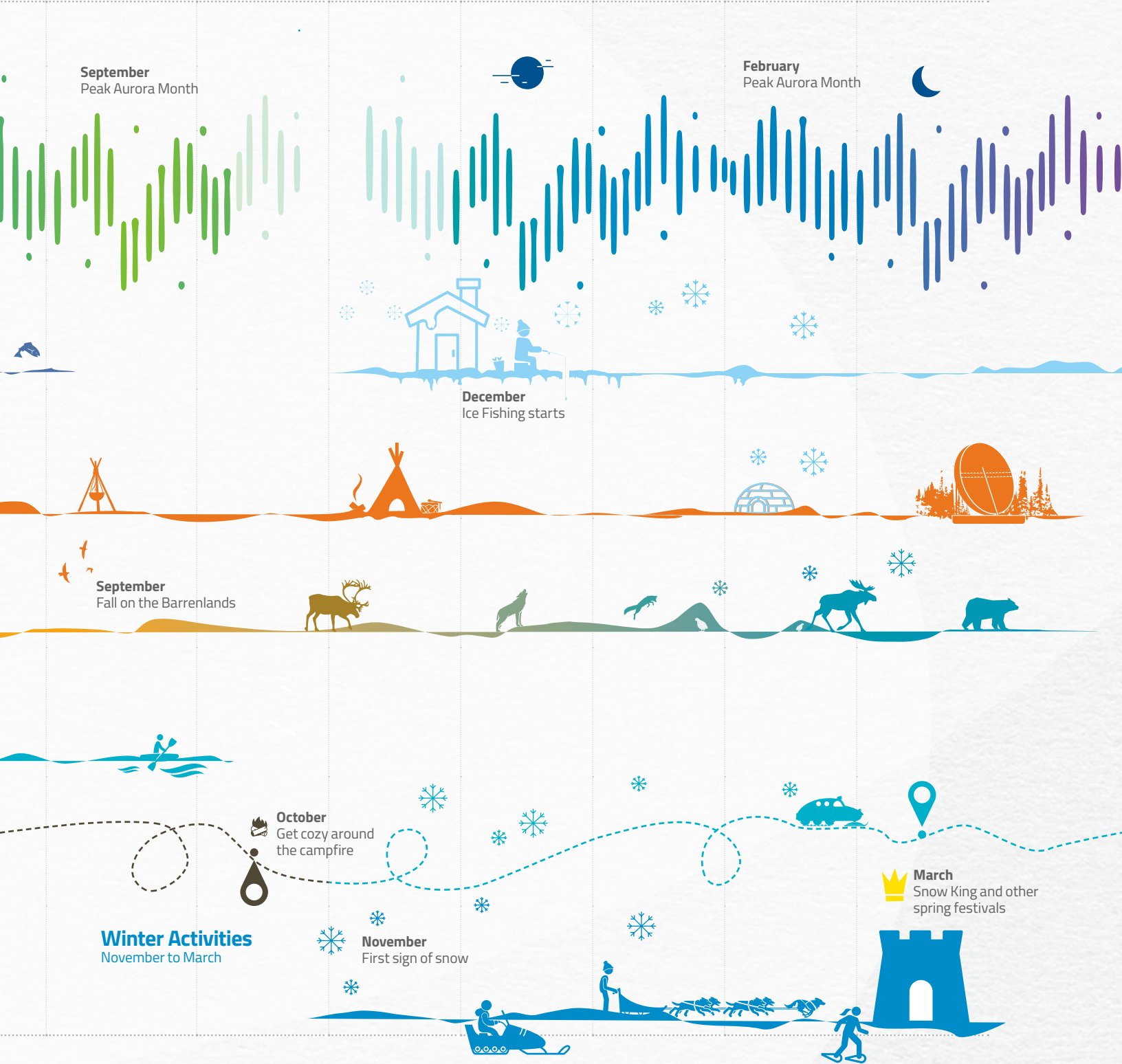
September
Fall on the Barrenlands

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)	
CONSUMER, TRADE AND MEDIA EVENTS	Toronto Sportsman Show, Toronto OAS, Montreal OAS, Calgary OAS, Vancouver OAS Snow Travel Expo Sydney/Melbourne Co-op opportunities increased	Focus Mexico Showcase Asia 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

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/per 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.



ARCTIC OCEAN

Northwest Territories Tourism 2023/24 Marketing Budget

CALL CENTRE

Mail and Delivery	\$33,500.00
Service Supplies	\$1,000.00
Toll Free Telephone	\$4,000.00
Upgrades to System	\$1,500.00
<i>Call Centre</i>	<i>\$40,000.00</i>

OUT OF HOME (OOH) MARKETING

Consumer Shows	\$49,500.00
<i>OOH Marketing</i>	<i>\$49,500.00</i>

AGENCY CONTRACTS

North America	\$113,000.00
Europe	\$70,000.00
Asia Pacific	\$125,000.00
<i>Agency Contracts</i>	<i>\$308,000.00</i>

COMMUNICATIONS

Media Shows and Events	\$25,000.00
Media Program and Familiarization (FAMS)	\$80,000.00
Media and Public Relations (MR/PR)	\$20,000.00
Photography and Video	\$75,000.00
Media Show Travel	\$10,000.00
<i>Communications</i>	<i>\$210,000.00</i>

MARKETING

North America	\$800,000.00
International	\$300,000.00
<i>Total General Advertising</i>	<i>\$1,100,000.00</i>
Regional Advertising	\$250,000.00
Special Projects	\$75,000.00
Brochure Development	\$47,000.00
Business Meetings	\$2,045.00
Promotional Materials	\$13,500.00
Research	\$25,000.00
B2B Shows, Meetings and Virtual Events	\$37,000.00
B2B Familiarization	\$16,000.00
Trade Shows Registration & Fees	\$37,500.00
Digital Development	\$115,000.00
Social Media	\$110,000.00
<i>Marketing</i>	<i>\$2,185,545.00</i>

NWT TOURISM CONFERENCE AND AGM

AGM Logistics	\$20,000.00
Venue Expenses	\$20,000.00
Speaker Travel (AGM)	\$10,000.00
Speaker Fees and Expenses	\$20,000.00
<i>Market Ready Training/Conference</i>	<i>\$70,000.00</i>

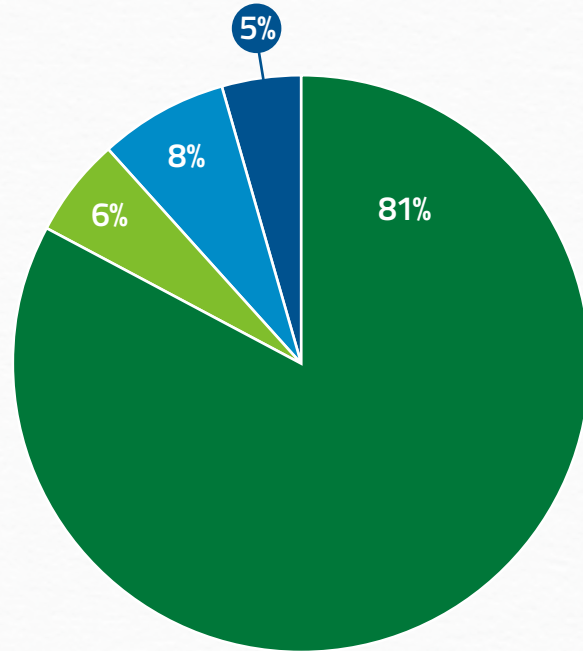
TOTAL BUDGET

\$2,225,545.00

Breakdown of Marketing Budget

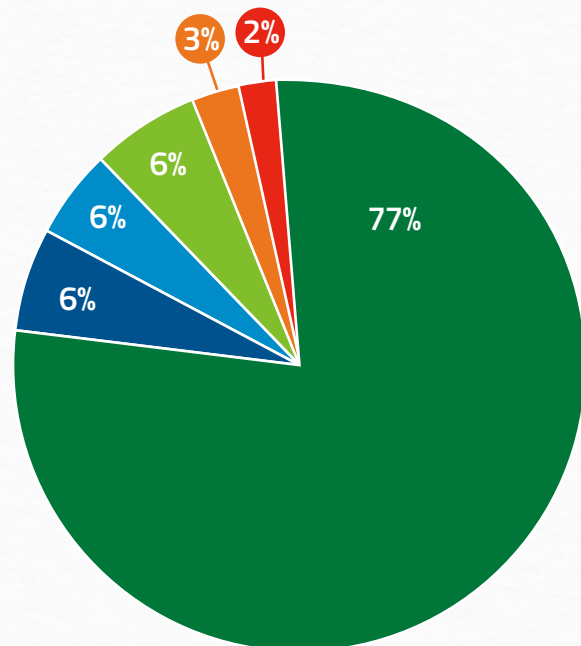
2023/24 Marketing Channel Budget Summary

- Consumer
- Media
- Travel Trade
- MC&IT



2023/24 Geographic Market Budget Summary

- North America
- Japan
- Europe
- Chinese Speaking
- Australia
- Korea



**Government of the Northwest Territories Budget Contributions only. Does not include additional funds supplied by NWT through partners such as Canada 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. Also, the call centre acts as the center for promotional items, the online store, shipping, consumer guides, brochures and the information centre for all things NWT.

Out Of Home (OOH) 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. While we will continue to attend these shows, the ROI will be measured. The pandemic's impact on large gatherings and travel behaviours have greatly impacted NWTT's participation in this activity causing us to consider alternate methods and rely on our strong digital strategy. We will increase the efforts in OOH marketing while also measuring the show program. 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). OOH efforts will focus on these areas.

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 videos and websites.

Market Ready Training

NWTT prepares and delivers market ready and other industry training as part of its Annual General Meeting (AGM). 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

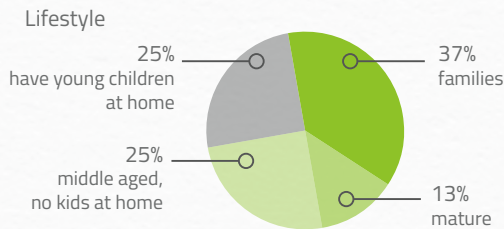
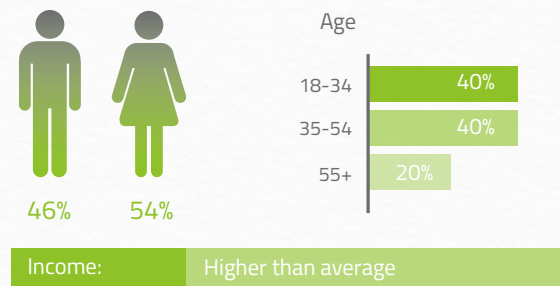
13% OF GLOBAL MARKET

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



Travel Values

Luxury, bragging rights, checklist samplers

CULTURAL EXPLORERS

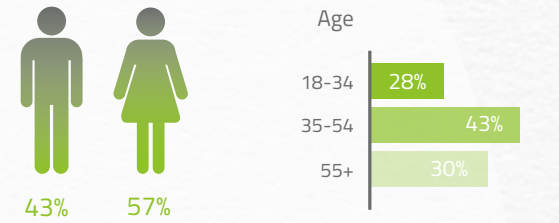
12% OF GLOBAL MARKET

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.

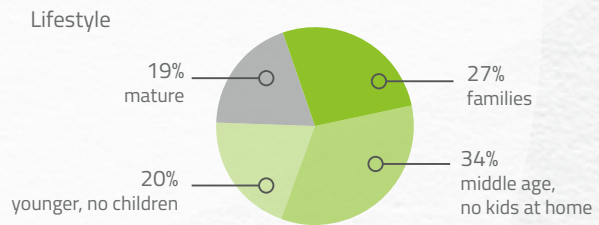
Social Values

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

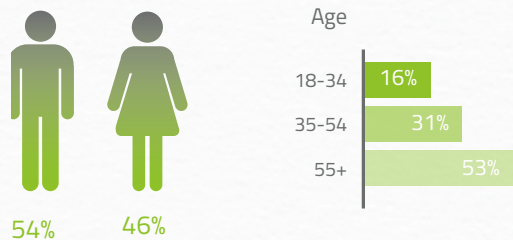
9% OF GLOBAL MARKET

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.

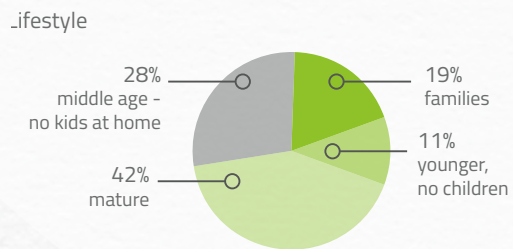
Social Values

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

Demographics



Employment:	Work full-time - higher percentage of retirees
Education:	Higher than average



Travel Values

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

NO HASSLE TRAVELLER

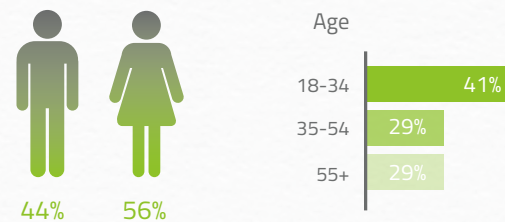
11% OF CANADIAN MARKET
10% OF AUSTRALIAN MARKET

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.

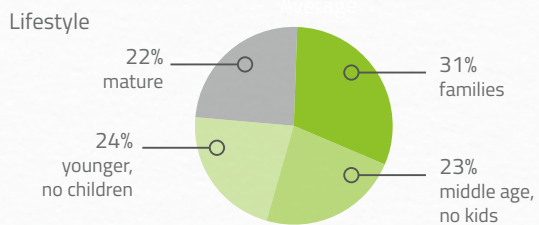
Social Values

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



Employment:	Full-time employed
Education:	Lower than average



Travel Values

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

SOCIAL SAMPLER

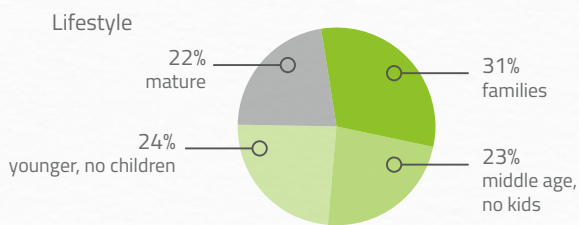
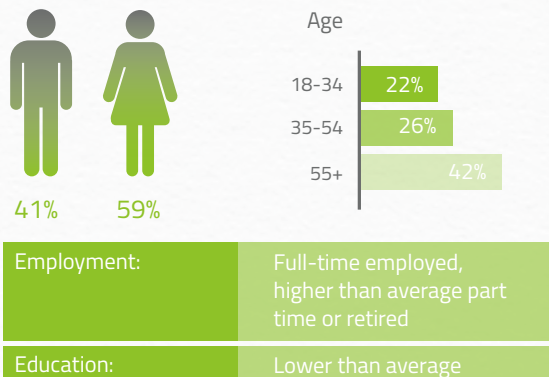
14% OF AUSTRALIAN MARKET

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



Travel Values

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

PERSONAL HISTORY EXPLORER

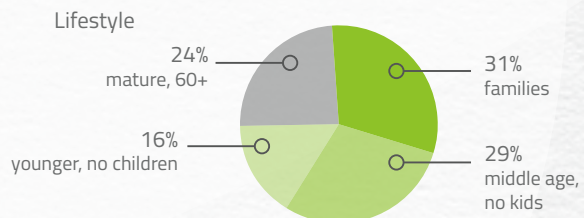
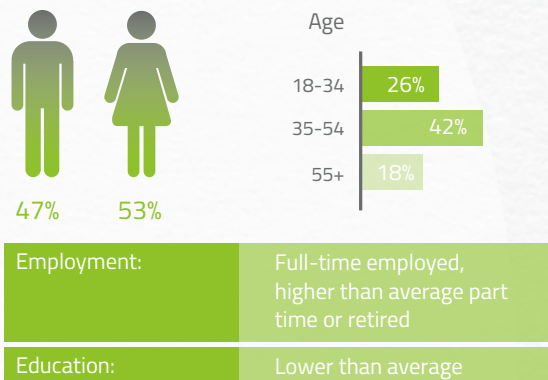
13% OF CANADIAN MARKET
14% JAPANESE MARKET
10% SOUTH KOREAN MARKET

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



Travel Values

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

REJUVENATORS

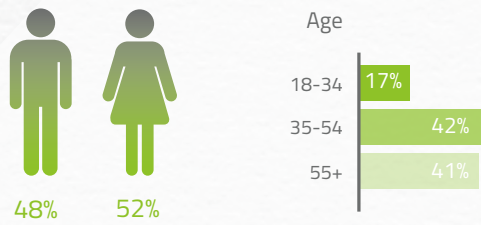
6% OF CANADIAN MARKET

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

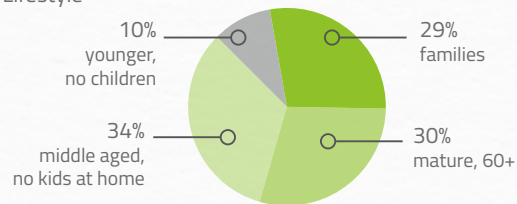
Stand up for their own beliefs, penchant for saving money, yet will buy on impulse, ethical consumerism, meaningful moments, they stick with social conventions

Demographics



Employment:	Less likely to be full time, higher than average retired or students
Income:	Lower than average

Lifestyle



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

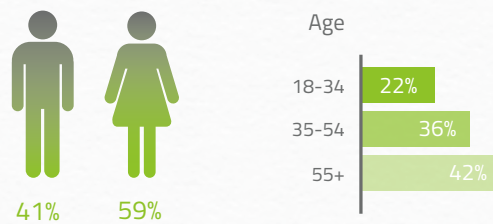
25% OF CANADIAN MARKET

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

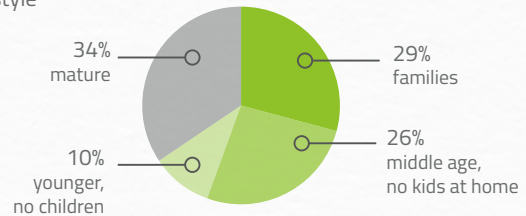
Living virtually, meaningful moments, savor the pleasures of life, high respect for authority, they find it thrilling to try new things

Demographics



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

Lifestyle



Travel Values

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

CULTURAL HISTORY BUFFS

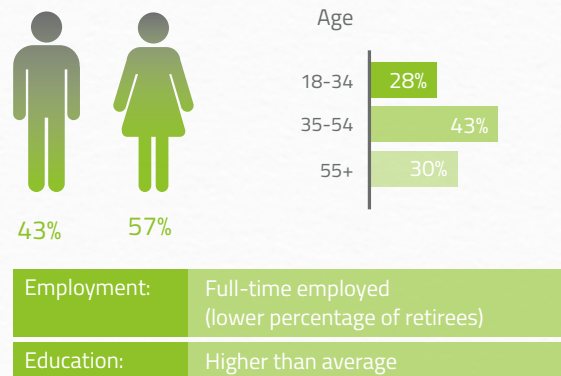
12% FRENCH MARKET
16% JAPANESE MARKET
16% SOUTH KOREAN MARKET

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.

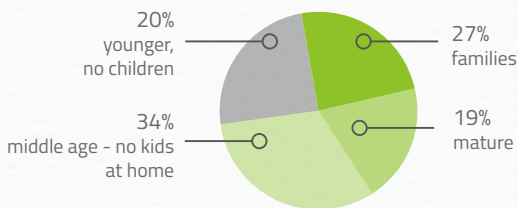
Social Values

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



Lifestyle



Travel Values

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

ASPIRING ESCAPISTS

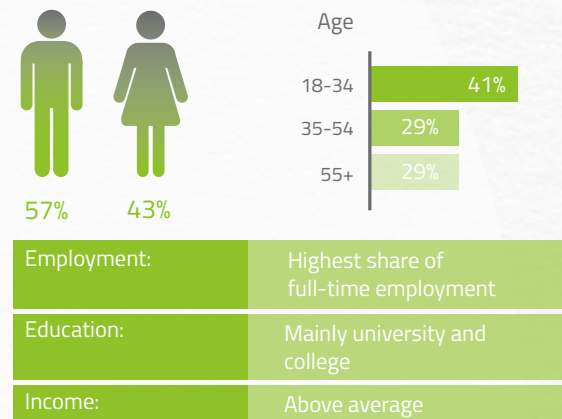
20% CHINESE MARKET

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.

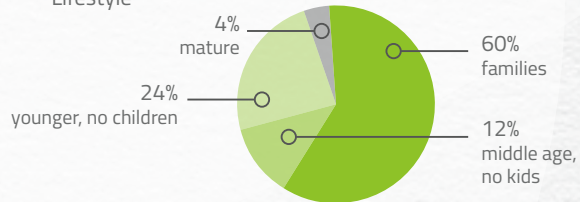
Social Values

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

Demographics



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**

WARRIOR WEST TOR



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%

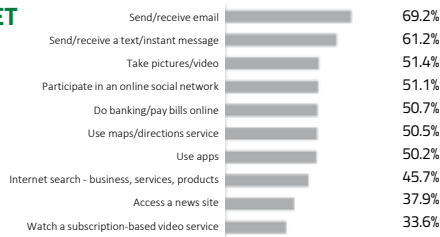
TOP MAGAZINE PUBLICATIONS

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

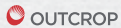


KEY TOURISM ACTIVITIES

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)

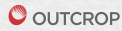
This group is composed of Canada's wealthiest households, which tend to be older, living in cities or suburbs. They see themselves as having worked hard and enjoy rewarding themselves for their efforts. They value status symbols and gravitate towards opportunities they personally find valuable or distinguishing.

 **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)




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 NWT 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 and was added as a primary market during the pandemic. 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 is 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 been met with success and will continue to be used to build Spectacular brand ambassadorship and support for the tourism economy from NWT residents.

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





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 within their (national) borders. 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 many major cities 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):

Jonview, JAC, Entrée Destinations, Dominion Tours, Anderson Vacations

TRAVEL TRADE SHOWS:

Rendez-vous Canada 2023 (Quebec), 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. 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. For the NWT this number is likely much higher due to the cost of trip for fishing, paddling and outfitted wilderness experiences. From January to November 2019, US arrivals to Canada by automobile and air averaged a combined year-over-year growth of 7%. 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. Furthermore through Destination Canada research, the Northern Lights were identified as a key potential trip driver. Working with Northern partners a pan-Canadian approach will be employed to attract US based Aurora visitation to Northern Canada.

According to Destination Canada, some of the other top activities that American leisure travellers wanted to experience included local food and drink tasting, nature-based experiences, such as seeing natural attractions, hiking or walking in nature, visiting nature parks, and viewing wildlife.

*Canada wide average

While air access for the US has been slow to recover, prior to the pandemic air travel from many major US cities to Yellowknife could be achieved in one day. Most US flights connect through Toronto, Montreal, Calgary, or Vancouver with Edmonton and Ottawa US connections an opportunity to explore further.

There are high costs to connecting directly to consumers in the US. In the busy marketplace, NWT Tourism’s marketing efforts need to focus on direct audience groups, niche markets and select outlets, for sector specific marketing activity. Travel Media provides the most cost affective way to connect with audiences weather with national partners or independently.

MEDIA TRADE SHOW: International Media Marketplace (IMM)

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, Google discovery, SEO/SEM.





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

Since January 2023, Chinese citizens are free to travel again as the country ends three years of strict COVID-zero policies. The China Outbound Tourism Research Institute estimates 18mn will travel internationally in the first half of the year, followed by 40mn in the second. While limited commercial flights and a backlog of visas present challenges, the China market remains one of Canada's most important potential markets. Pre-pandemic, China was Canada's second-largest long-haul market. China also presents a valuable average visitor spend of \$2,668 per visitor, ranking as one of the top spenders of all countries.

NWTT has sustained its presence and partnerships in the China market through the pandemic and is well-positioned to continue promoting the trip-motivating message of NWT as the world's most spectacular place to experience the Aurora. In 2023, the NWTT marketing program in China integrates trade development, consumer awareness, promotion and social media. In step with Destination Canada China, NWTT targets High Value Travellers (HVT) in affluent urban centres who value unique, legendary experiences close to nature. 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. NWTT will continue engaging partners with Chinese-language materials that showcase local operators and businesses in web, print and digital formats.

Notably, NWTT has continued to target the over 1.5 million local Chinese already living in Canada with activations, geo-targeted messaging and non-traditional partnerships. Local Chinese have a high probability of repeat travel and are more likely to visit lesser-known areas of NWT and in off-peak season. This demographic of local Chinese already comfortable travelling in Canada have been among the first to visit NWT when borders reopened. 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:

RVC (China), DC China Special Events

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 and welcome Chinese travel globally now that borders have reopened.





JAPAN



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 Buffs 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 was in addition to direct flights between Tokyo and Calgary. Direct flights between Vancouver and Yellowknife, and Calgary and Yellowknife has made the NWT highly accessible to Japanese travellers.

Many of these flight routes have been slow to return and some have ceased all-together. Working in partnership with air carriers will be very important to recovery the Japanese market.

TRAVEL TRADE SHOWS: The importance of this market requires an annual trade update. Partners will be sought in-market to maximize efficiency of FAM's, as well as sales and training visits or trade missions.

STRATEGY: The show, Focus Japan, is held every second year. It is anticipated that the next Japan event will take place in the fall of 2023, 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: HIS, JTB, Fellow Travel, Global Youth Bureau, Alpine Tour Service, Maple Fun Tours, Hankyu, Club Tourism, Jalpak, and Mitsukoshi Isetan Nikko Travel.





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 Sprits 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 an eight-night 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 visit, 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 increasing 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. 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)





POPULATION: 128.9 million

AUDIENCE SIZE IN MEXICO:
344,500

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

EQ TRAVEL SEGMENTS:

Authentic Experiencers 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. With short lead in times on bookings, the Mexican Market has been a well suited first mover in the recovery of tourism in the NWT.

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 2023

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





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 2023, 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

MARKET INSIGHTS:

Australians want iconic, memorable and authentic experiences that they can touch and feel. They are looking to form lifelong memories and take pride in telling their friends that they've done something truly unique. 2.79 million Australian travellers have immediate potential to book a trip to Canada, with 522,000 of those identified as High Value Guests (HVG).

Traditionally, Australian travellers spend more and prioritise travel over other major purchases. This remains true in the post pandemic world, with Australians holding over \$8 billion of travel credits and post-pandemic household savings.

VALUE ALIGNMENT:

Many Australians are seeking out responsible travel options and they consider Canada a socially and environmentally friendly destination. They are drawn to experiences that allow them to connect with people in the communities they visit.

RELIANCE ON TRAVEL AGENTS:

With travel becoming increasingly complex, travel agents will be essential. A large majority of Australians indicate that they will rely on travel expertise to navigate the complexities of post-COVID travel. The Global Tourism Watch indicates 78% of Australians are likely to use a travel agent to book their trip to Canada.

POTENTIAL MARKET:

5,555,000 with 50% definitely/very likely to visit Canadian the next 2 years.

2,794,000 is Canada's immediate potential in the next 2 years

DEMOGRAPHICS AGE:

36% (18-34)

31% (35-54)

33% (55+)

TOP MOTIVATORS:

Safe to visit

Outdoor experiences

TRAVEL ACTIVITIES:

Cruise, rail, rockies, wildlife and aurora viewing as the biggest bucket list items



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