



NORTHWEST TERRITORIES TOURISM

PURSUING SPECTACULAR POTENTIAL

2019/20 MARKETING PLAN

SPECTACULAR
NORTHWEST
TERRITORIES





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EXECUTIVE SUMMARY

Both the Government of the Northwest Territories and Northwest Territories Tourism (NWTT) have a five-year strategy with goals and objectives that are focused on growing the value of tourism in our Territory.

Each year NWTT concentrates its marketing efforts towards meeting these goals. Content marketing continues to show success and in 2019-20 we will expand content marketing within our overall marketing programming.

In 2017-18 our marketing efforts blended our traditional approach of one major integrated campaign each year, with our new approach of “always on” and an increased focus on digital. The “always on, in all markets” approach that has guided our work since January 2018, will continue to guide the marketing efforts in 2019/2020.

This plan maps out the activities and related distribution channels that make up NWTT’s annual marketing calendar. A detailed budget is included in this plan and quarterly financial reporting will be aligned to the budget.

This year’s plan focuses on proven tactics related to ongoing digital marketing efforts and introduces some new marketing techniques, including cobranding and influencer marketing.

We will continue using content marketing as a centrepiece of our activities, delivering fresh content in a variety of channels to our targeted audiences. Using Search Engine Optimization (SEO) and Search Engine Marketing (SEM), we will pull more of the right people to read and act on our messaging.

The plan is grounded in research and provides clear and concise indicators that we can measure our progress against. These indicators are relevant to the industry and will help ensure we’re reaching our target audiences with the right messages.

To reach our target of \$235 Million in visitor revenue in 2020/21, we look forward to working closely with our government partners, and all our stakeholders in the tourism industry.



ABOUT US

Northwest Territories Tourism (NWTT) undertakes all destination marketing activities for the Northwest Territories through funding agreements with the Government of the Northwest Territories (GNWT). NWTT also works to enhance these efforts through other public funding agreements and private partnerships.

NWTT is a non-profit organization serving close to 200 members whose businesses involve the tourism industry. Our organization is governed by a Board of Directors that includes elected representation from the various industry sectors and regions and appointed directors who represent Indigenous governments. Based in Yellowknife, our small team of nine staff work with contracted General Sales Agents in Japan and Germany and with other contracted marketing partners in South Korea, China, and Australia to present the Northwest Territories as a great travel destination.

Using a variety of innovative marketing strategies to help build destination awareness and to drive business to local tourism operators, we actively promote all NWT regions and tourism sectors to our key domestic and international markets.

NWTT works closely with a variety of local, regional, national and international partners to establish our brand, uphold our destination's reputation and increase visitation and visitor revenues to the NWT.

VISION: A thriving, vibrant, sustainable and successful tourism industry

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

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OUR SPECTACULAR BRAND

Our brand encourages visitors to immerse themselves in a world of multi-sensory experiences that are surprising and rejuvenating. Our people are friendly, hospitable and great storytellers. Like the land they dwell in, they are quirky, honest and full of surprises.

The Northwest Territories is the third largest jurisdiction in Canada by area, and the third smallest by population. Northwest Territories offers amazing skies, hundreds of lakes and rivers, towering mountains, vast plains, expansive ocean coastlines and abundant wildlife. Its enormous size, varied geography, northern location, authentic Indigenous cultures and friendly people are all part of the Northwest Territories' brand assets.

More than 10 years ago, the Northwest Territories selected the word "spectacular" to define its brand assets. The implied promise behind "Spectacular NWT" was and continues to be that "the Northwest Territories offers a range of 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. In short, Spectacular NWT is simplicity, surprise and awe.

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

SPECTACULAR
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FUNDING AND PARTNERSHIPS

A healthy tourism industry is good for the economy. In 2017, visitors to the NWT directly spent \$203.4 million dollars. This expenditure supports hundreds of NWT businesses plus their supply chain, and contributes to employment as well.

In addition to core funding agreements, public and private partnerships play a key role in the success of any Destination Marketing Organization (DMO). Core funding can be leveraged to obtain additional funding envelopes that help NWTT undertake research, pursue training and develop marketing innovations, all of which are key to any DMO being able to carry out its mandate. Our partnerships include national, territorial and community-based organizations in both the public and private sectors. At the heart of our partnership success is the core marketing funding provided by our primary funding partner – the Government of the Northwest Territories.

GOVERNMENT OF THE NORTHWEST TERRITORIES

Since NWTT was established in 1996, the GNWT has and continues to contract NWTT to market our territory on its behalf.

The core marketing program is the most significant component of NWTT's marketing program. Core marketing activities focus on building general awareness in our key target markets. The ultimate intent is to drive the customer to contact local tourism operators and hospitality related businesses as they explore visiting the NWT or better yet, to book their trip and the experiences they will have while visiting us.



The primary focus is the domestic market, which currently generates the largest number of visitors to the NWT. Marketing efforts also focus on our key international markets, which attract a higher spend per visitor to the NWT. Our marketing budget ratio is approximately 70% domestic marketing and 30% international marketing. Domestic marketing focuses on consumer direct marketing, with digital being the primary mode of communication with our target audience. International marketing efforts focus primarily on the travel trade and where we pursue the consumer directly, our partnerships with Destination Canada and marketing agencies to elevate our destination's presence on social media platforms are important.

While our core marketing is planned to ensure a reflection of the whole territory, additional regional marketing projects and other special initiatives are carried out with funds linked to GNWT's Tourism 2020 initiative. *Tourism 2020: Opening our Spectacular Home to the World* is the GNWT's third in a series of five-year tourism plans, designed to increase the value of the industry in the Northwest Territories. Regional projects are planned with GNWT's regionally based tourism staff, to focus specifically on marketing the products, experiences and activities in the five regions of the NWT. Special initiatives are unique marketing projects initiated by GNWT ITI as new opportunities arise, which NWTT advances in partnership with GNWT.

NWTT has an agreement with the GNWT to operate the NWT Conference Bureau. Activities of the NWT Conference Bureau include the preparation and submission of bids to host conferences in the Northwest Territories in follow-up to sales leads generated by NWTT's activities in the Meetings, Conferences and Incentive Travel (MCIT) markets. It also includes hosting site visits in the Northwest Territories for southern based event planners who have shortlisted the NWT as a potential destination for their meeting or conference. Site visits help southern event planners confirm that the NWT has the facilities, services and resources for them to hold their event or conference successfully in the NWT.

CANADIAN NORTHERN ECONOMIC DEVELOPMENT AGENCY (CANNOR)

Established in 2009, CanNor works to develop a diversified, sustainable and dynamic economy across Canada's three territories. CanNor fosters growth and economic development in Canada's North by delivering economic programs that respond specifically to the economic challenges and 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 targeted our key domestic and international markets and that enhanced our core activities. NWTT has submitted an application to CanNor for the 2019/20 and 2020/21 fiscal years. Our application includes destination



awareness research to benchmark awareness midway in our 5 - Year Strategy, and other enhancements to our core marketing in both domestic and international markets. At the time of writing this plan, a decision by CanNor on our application is pending.

DESTINATION CANADA (DC)

DC is the official national DMO for Canada. In collaboration with its tourism industry partners, DC promotes Canada as a travel destination internationally. DC's primary markets are Australia, China, France, Germany, India, Japan, Mexico, South Korea, the United Kingdom and the United States. DC offers partnership and cooperative marketing opportunities to promote Canada in the international marketplace to all provincial and territorial DMOs and to other industry partners. NWTT regularly partners with DC where there is a fit between target markets and campaign priorities.

INDIGENOUS TOURISM ASSOCIATION OF CANADA (ITAC)

ITAC is a national non-profit organization that creates partnerships between associations, organizations, government departments and industry leaders across Canada to support the growth of Indigenous tourism in Canada and to address the demand for development and marketing of authentic Indigenous experiences.

ITAC has set aside funding for each province and territory to support partnerships with ITAC on mutually agreed upon

activities. In September 2018, GNWT, NWTT and ITAC signed an MOU to work together on common areas of interest. For NWTT, partnerships with ITAC will focus on shared marketing regarding unique Indigenous experiences that the visitor can enjoy when in our destination and making available our copyrighted training materials to grow business, market and trade ready Indigenous operators.

INDUSTRY & OTHER PARTNERS

As part of an annual cooperative marketing program, NWTT offers a wide range of cooperative marketing opportunities to local tourism operators. This includes discounted rates to participate in consumer shows, digital advertising and social media advertising. Each year, local tourism businesses contribute approximately \$50,000 to the overall budget through this program. Local partners also help NWTT stretch its marketing dollars further by providing discounts to support media and trade familiarization tours.

NWTT also works with CDETNO (Conseil de développement économique des Territoires du Nord-Ouest), whose mandate is to promote tourist attractions of the Northwest Territories in Francophone markets as part of its economic development mandate. Working together, NWTT and CDETNO have advanced key marketing collateral materials in French languages for use by both NWTT and CDETNO, with CanNor funding.



INDUSTRY INSIGHTS

Visitors to the Northwest Territories come from around the world as well as from across Canada. They come for different reasons, and they look for different experiences. As part of our annual marketing plan development, we examine international and domestic markets for travel numbers, travel habits and travel interests. We start with a larger overview of these markets, then we examine them in more detail (see Appendix A) to streamline the market - product match.

2017 CANADIAN VISITATION STATISTICS

Market	# of Arrivals	% Increase from 2016
 United States	14,300,000	3%
 United Kingdom	801,000	-3%
 China	682,000	12%
 France	571,000	5%
 Germany	388,000	5%
 Australia	375,000	13%
 Mexico	359,000	47%
 Japan	304,000	0%
 South Korea	286,000	17%
 India	254,000	18%
TOTAL	18,320,000	

GLOBAL CONTEXT

The international tourism industry continues to grow at a rapid rate. The United Nations World Tourism Organization (UNWTO) reported that international tourist arrivals for 2017 totaled 1.323 billion. This is an increase of over 84 million (6.78%) from the previous year. The tourism sector has now seen uninterrupted growth in arrivals for eight consecutive years. International tourism receipts increased by 5% in 2017, with total tourism exports totaling \$1.6 trillion USD (\$4 billion a day). China continues to lead global outbound travel, spending \$ 258 billion USD on international tourism in 2017. This is approximately one-fifth of the world's tourism spending in 2017. Available data for early 2018 confirms international tourism's continued growth with a year-on-year increase of 6% in arrivals between January – April.

With the ongoing developments in mobile and wireless technology, there has been a significant shift in how the consumer researches and books travel. Mobile devices are now nearing a point where they will surpass computers as the primary tool used to access travel information and to book travel. Social media continues to play an important role in travel decision making.

Another emerging trend in the global travel industry is the personalization of the customer travel experience. With the ability to collect and analyze a growing volume of customer data, it is essential for DMOs and tourism providers to build more relevant and personalized customer experiences that anticipate the customers' needs in order to stand out from the competition.

CANADIAN CONTEXT

Inbound international travel to Canada continues to perform very well. In 2017, Canada surpassed previous visitation records by welcoming an estimated 20.8 million international tourists. This is an increase of 820,000 from the previous year. This increased visitation was supported by a growth in aviation capacity, currency advantages, a strong Canada brand and a significant increase in federal marketing investments made with Destination Canada. The awareness generated by Canada's 150th anniversary and visitors to Canada from a number of prominent travel publications, helped to put Canada in the international spotlight.

Canada experienced notable growth from key markets in 2017.

Mexico generated nearly 50% growth in arrivals to Canada, which was largely attributed to the elimination of travel visa requirements and an increase in air capacity. Significant growth from India (18%) was the result of an increase in air capacity. While growth from the US market was more modest at 3%, visitors entering Canada via air increased by approximately 7% from the previous year. Arrivals to Canada from China reached a record level of 682,000 visitors, up 12 % from 2016. With the Government of Canada's New Vision for Tourism putting emphasis on this market, with a goal to double this number by 2021, this is expected to see further growth.

During the first three months of 2018, Canada's tourism economy grew by 5.6% over the previous year buoyed by significant gains in both the domestic and international travel markets. The largest gains occurred in the passenger transport (8.8%), food and beverage (5.3%) and accommodation (4.4%) sectors.

TOURISM IN THE NWT

Based on the most recent research data available, visitation to the Northwest Territories is at an all-time high. In the 2017/18 fiscal year (April 1 – March 31), 76,730 leisure travellers visited the NWT. This is a 4% increase from the previous year. The number of Aurora visitors continues to grow at a substantive rate. This past year, 34,900 visitors travelled to the NWT to see the Aurora, with most of them visiting the Yellowknife area. The visiting friends and relatives market fell after a prominent 2017 when Canada celebrated its 150th birthday, with 14,600 visitors travelling to the NWT in 2017/18. Business travel increased by 3% from the previous year. Sport fishing numbers showed a decline of 7%, reflecting a decline in recreational fishing that is Canada wide.

Visitor spending also reached its top performance to date, with \$203.4 million in revenues being generated in 2017/18. This expenditure puts us well on the path to meeting the target of our Five Year Marketing Strategy, which is to increase annual visitor expenditures to \$235 million annually by 2020/21. The biggest economic drivers for this were business travel at \$87.1 million and the Aurora sector at \$56.9 million.

Northwest Territories Visitation Statistics

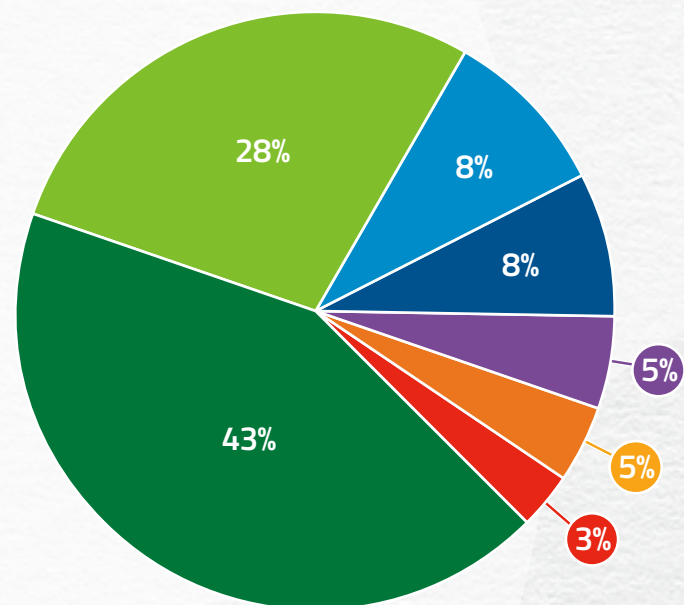
NUMBER OF VISITORS							
Main Purpose of Travel	2013-14	2014-15	2015-16	2016-17	2017-18	% Change (Yearly)	% Change (5 Year)
Aurora Viewing	21,700	16,400	24,300	29,800	34,900	17%	61%
Fishing*	5,600	4,300	4,600	4,200	3,900	-7%	-30%
**General Touring	14,800	14,900	19,000	15,800	16,200	3%	9%
Hunting	510	510	510	480	430	-10%	-16%
**Outdoor Adventure	1,900	2,100	2,400	7,400	6,700	-9%	253%
Visiting Friends and Relatives (VFR)	14,100	17,200	12,200	15,900	14,600	-8%	4%
TOTAL LEISURE TRAVEL	58,610	55,410	63,010	73,580	76,730	4%	30%
Business Travel	35,300	29,400	30,900	34,900	35,800	3%	1%
TOTAL VISITORS	93,910	84,810	93,910	108,480	112,530	3%	19%

Visitor Spend Percentages 2017-18

BY PRODUCT CATEGORY

- \$87.1 million – Business Travel
- \$56.9 million – Aurora Viewing
- \$17.1 million – Outdoor Adventure
- \$16.4 million – General Touring
- \$10.1 million – Visiting Friends/Relatives
- \$9.7 million – Fishing
- \$6 million – Hunting

\$203.4 million - Total spend



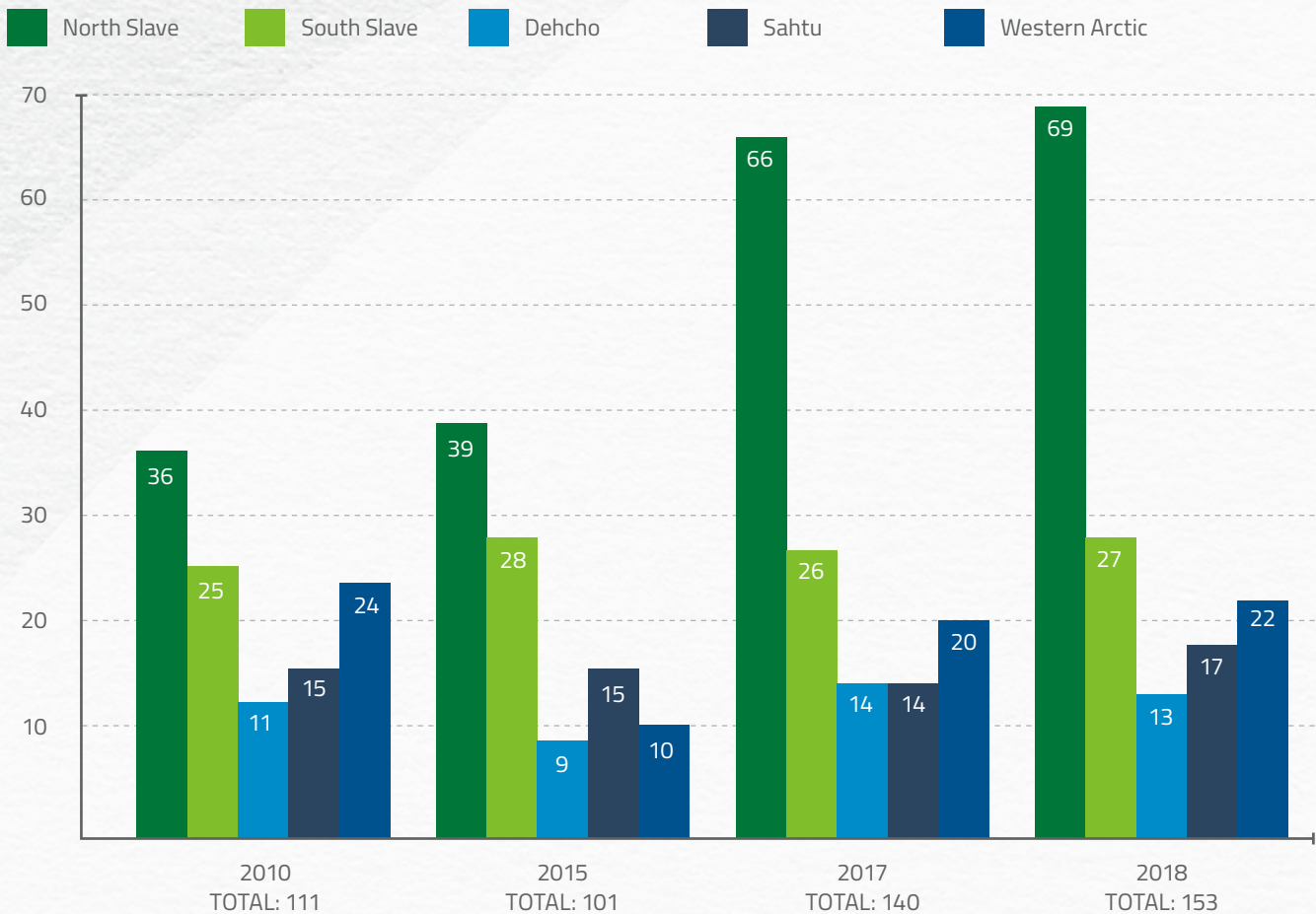
Notes:

*Methodology and historical data revised in 2016-17

**Methodology for data collection was adjusted in 2016-17 to more accurately segment General Touring and Outdoor Adventure visitors. This adjustment must be taken into consideration when viewing historical comparisons.

Information prepared by the GNWT Department of Industry, Tourism and Investment.

NWT Licensed Tourism Operators



Data from several of the regional visitor information centres indicates that there has been an increase in travel to the regions. In 2018, the visitor information centre in Tuktoyaktuk received 1,535 visitors between July 18 and August 18, with the majority of this new traffic as a result of the opening of the all-season road between Inuvik and Tuktoyaktuk in late 2017. The Hay River visitor information centre reported a significant increase in traffic in 2018, between the months of May – September.

The increase in the number of visitors and visitor spending has resulted in a significant growth in the number of licensed tour operators in the NWT. In 2010 there were 111 licensed tourism operators in the NWT. This has increased to 153 in 2018.

The growth in tourism has also resulted in an increase in air capacity for flights coming into the NWT. Air Canada has added a daily year-round direct flight between Vancouver and the NWT, in addition to the direct flight that has and will continue to operate during the winter Aurora season.

There has also been significant capital private sector investments to increase accommodations in Yellowknife in response to growing demand during peak Aurora seasons. The regions are well positioned to benefit from this trend, as a number of travellers, particularly from the Chinese market, have expressed an interest in experiences outside of the capital city. Car rental companies in Yellowknife and RV rental companies are experiencing increased demand for their fleets from the leisure tourism market.

EMERGING INDUSTRY TRENDS

Culinary Tourism

An increased interest in food when travelling has been steadily increasing, transforming culinary tourism into a new global trend. Across all of Destination Canada's international markets, culinary activities are one of the top travel activities chosen when visiting Canada. Culinary tourism focuses on culinary experiences that feature locally sourced food and drink, rather than merely sightseeing. As part of the experience, the tourist learns about, and/or consumes food that reflects the local, regional or national cuisine and traditional culinary techniques. The article "The rising trends in travel and tourism for 2018" states that future culinary tourism will move away from expensive dining to more authentic food experiences including visiting local markets and dining with locals in their homes. For some travellers, their entire holiday will be planned around food, with destinations chosen based on their culinary offerings.

Indigenous Tourism

Indigenous tourism in Canada has grown significantly in recent years. According to research conducted by Destination Canada (DC) and the Indigenous Tourism Association of Canada (ITAC), authenticity appears to be the primary factor for travellers who are considering an Indigenous tourism experience. Travellers seeking Indigenous tourism experiences are looking for one-on-one interactions with Indigenous people in a small intimate setting. They are looking for opportunities to learn about cultures, traditions, arts, food, storytelling and the history of the area. They want to be active participants in a one-of-a-kind adventure that provides them with a deeper connection to their surroundings.

Indigenous cultural experiences tend to be booked as an add-on when the traveller is already at a destination. Sometimes the traveller is specifically looking to partake in an authentic Indigenous tourism experience, while other times they partake in an activity that is part of a pre-booked package.

Recognizing this opportunity, NWTT will work closely with GNWT ITI and ITAC to market authentic Indigenous tourism experiences, incorporating these into the fabric of the travel experiences offered in the NWT.

Luxury Travel

Luxury travel has become one of the fastest growing travel segments. In the report "Shaping the Future of Luxury Travel" by Tourism Economics, it was stated that growth in luxury travel between 2011-2015 expanded at a rate of 4.5%. This is slightly higher than the overall travel growth rate (4.2%). The luxury travel market has remained resilient despite challenging economic times. Over the next 10 years outbound luxury travel is projected to grow at a rate of 6.2 %, which is a third greater than overall travel at 4.8%.

It is important to remember that luxury travel is subjective. There is no one definition of luxury travel, but it is determined from a range of products. This includes unique scenery, specialized cuisine, breathtaking décor, and integrated travel experiences that combine everything from gourmet foods to spa experiences.

LGBTQ2 Travel

A memorandum of understanding between Destination Canada and Travel Gay Canada was signed in 2017 to help promote Canada as a travel destination for choice to the LGBTQ2 traveller. The global value of this market was over \$211 billion USD in 2015. Further research from the UNWTO Second Report of LGTB Travel states that there are over 35 Million international tourists that are part of the LGBTQ community. This is an emerging sector, across all markets which can create economic opportunities for the NWT, should product offerings be available.

Bleisure

Travellers who combine business and leisure, known as "Bleisure" is a growing segment. On average, 60% of business trips turned into bleisure trips. (Countries studied were US, UK, China, Denmark, Germany). Bleisure travellers tend to extend their domestic business trips into bleisure ones, and are most likely to be travelling for a conference. This market holds potential for the NWT to grow as the MCIT activity increases.

SWOT ANALYSIS

A SWOT analysis is a useful technique for understanding the strengths and weaknesses of the tourism industry in the NWT. It identifies opportunities and threats that may have an impact on our industry. The following is a summary of our current SWOT analysis.

Strengths

- Significant natural assets including the Aurora, pristine lakes and rivers, mountains, barrenlands, and wildlife
- The only all-weather road in North America that leads to the Arctic Ocean
- Scientific proof that the NWT is the best Aurora viewing destination in the world
- Increased air access from both domestic and international markets, including the recently added year-round direct flights from Vancouver
- Diverse authentic Indigenous culture throughout the NWT
- World class sport-fishing throughout the territory
- World class national and territorial parks
- NWT is considered a safe destination and travellers are increasingly considering safety in their travel plans
- Growing number of licensed tourism operators in the NWT
- The MCIT (meetings, conference, incentive travel) is performing well
- Availability of programs and services to support tourism growth in the NWT

Weaknesses

- High cost of travel, especially outside of Yellowknife
- Limited products, services and activities available to visitors
- Low number of trade-ready operators
- Shortage of accommodations during peak Aurora seasons
- Limited regional conference capacity and higher regional costs for southern based conference planners considering the NWT
- Conference facility configurations in Yellowknife challenged the ability to host over 350 delegates
- Aging demographic for the sport-fishing market and a decline in recreational fishing nationally
- Visitor data across the regions is not uniformly collected and is limited, and does not show seasonal trends
- Shortage of front line workers in the hospitality industry, and a growing need for those that speak foreign languages
- Marketing budget is less than most competitor destinations

Opportunities

- Availability of BMT standards training programs and trained trainers to support an increase in the number of market and trade-ready operators
- 2018 MOU with GNWT, NWTT and ITAC to develop, train and market NWT Indigenous tourism experiences
- Enhanced marketing and research projects in partnership with CanNor
- Destination Canada's NorthStar 22 Cooperative Marketing Programs
- Co-branding with other partners to extend market reach
- Legislation enabling municipal accommodation levy collection and increased destination marketing funds
- Regional marketing plans
- Exponential growth of the Asian markets in Canada
- Upcoming establishment of Thaidene Nene National Park and product development advancements in the community of Lutsel K'e
- Globalization of social media and digital research enables information about the NWT to be targeted at and served to travellers interested in travel products that NWT offers

Threats

- Stiffer competition for Aurora visitors from both domestic and international markets
- Price advantage and modernization of fishing lodges in other Canadian destinations
- Extensive global reach of social media when unfavourable travel situations occur
- Unlicensed accommodation providers may increase risk of negative guest experiences
- Global warming affecting weather patterns, causing a number of weather related issues for travellers
- Northern airline merger could reduce marketing partnerships available for NWTT and/or may result in increased airfares and reduced air capacity

TOURISM 2020



Using insight of the GNWT publication “Tourism 2020: Opening Our Spectacular Home to the World” NWTT will work closely with ITI with our marketing efforts to ensure we do our best to assist in achieving the overall goals of the plan. The focuses outlined have intertwining elements with NWTT’s 5-year Strategic Plan, and the work undertaken by NWTT will support Tourism 2020’s success.

Guiding Principles; Integrated, Sustainable, Community-Driven, Risk Sharing, Flexible.

Focus I Visitor Attraction & Experience

1. Increase Visitor Volume and Visitor Spending
2. Increase Supply and Diversity of Tourism products
3. Sustain Demand through Visitor Experience Excellence

Focus II Aboriginal Cultural Tourism

1. Support and Encourage the Development of Aboriginal Cultural Tourism
2. Increase Capacity to offer Aboriginal Cultural Tourism
3. Strengthen Aboriginal Cultural Tourism through partnerships

Focus III Community Tourism Development

1. Build the Foundation for Community Tourism
2. Engage Stakeholders and Build Capacity for Tourism

Focus IV Skills Development

1. Develop and Support the Tourism Workforce

Focus V Tourism Research & Planning

1. Focused Research
2. Gather, Assess, Report and Monitor
3. Support Research through Partnerships and Engagement

Partnerships will guide the success of Tourism 2020. The GNWT identifies that industry, organizations and all levels of government are needed to achieve the goals and objectives of its five-year plan. NWTT is a key partner for GNWT and its role is to support the marketing-related goals of Tourism 2020.





TARGETING OUR MARKETS

Identifying primary and secondary markets is an important step in developing a successful tourism marketing plan. Markets are broken down into psychographic markets (attitudes, beliefs and values) and geographic markets. This approach allows us to develop a thorough understanding of these market segments, and to determine what markets are a match for the tourism products and services offered in the Northwest Territories.

NORTHWEST TERRITORIES VISITATION BY PURPOSE OF TRAVEL 2017/18

MAIN PURPOSE OF TRAVEL	VISITORS #	SPEND (MILLIONS)
Aurora Viewing	34,900	\$56.90
Fishing	3,900	\$9.70
General Touring	16,200	\$16.40
Hunting	430	\$6.00
Outdoor Adventure	6,700	\$17.10
Visiting Friends and Relatives	14,600	\$10.10
Total Leisure	76,730	\$116.30
Total Business	35,800	\$87.10
TOTAL	112,530	\$203.40



PSYCHOGRAPHIC MARKETS

To better understand Canada's target markets, Destination Canada developed a proprietary market segmentation system based on the science of psychographics. Psychographics is an evolution of the traditional demographics used to identify, and communicate to, target markets. This system, developed in partnership with the Environics Research Group, is called the Explorer's Quotient® (EQ). The focus of EQ is specifically on the travel market. Instead of just breaking travellers into groups based on age, income, gender, family status or education level—all of which is useful information -- psychographics looks deeper at people's social values and views of the world.

Working with the EQ data, DC has established 10 different categories that travellers to Canada fit into. These include Free Spirits, Cultural Explorers, Authentic Experiencers, No-Hassle Travellers, Social Samplers, Personal History Explorers, Rejuvenators, Gentle Explorer, Cultural History Buff and Aspiring Escapists. Destination Canada has used EQ for its own Brand Canada Marketing efforts since 2006/07, and offers it to provincial, territorial and regional destination marketing organisations (DMO's) on a licensed basis. NWTT subscribes to EQ and is a licensed user. Please see Appendix B for an overview of these EQ types.

GEOGRAPHIC MARKETS

NWTT selects geographic markets based on a number of criteria. This includes the number of visitor to Canada and the NWT, total

visitor spend, average spend per traveller and the match between the products that a particular geographic market is looking for and the products available in the NWT. Other factors include an assessment of the strength of a country's economy, air capacity into Canada and other factors such as currency exchange rates and visa/passport requirements that may impact travel to Canada.

An initial assessment of international markets is based on the markets that DC is active in. These include the United States, Mexico, Japan, China, South Korea, Germany, France, United Kingdom, Australia and India.

In selecting geographic markets, it is also important to consider diversification in the portfolio of geographic markets pursued. This ensures that the Northwest Territories is not reliant on any one particular geographic market where economic factors are outside of the NWT's control. Market diversification also can address the need to extend the tourism season and push regional visitation as some markets may only be interested in Aurora, others may focus on the summer months and others may be more interested in driving routes to locations such as the Arctic Ocean.

Based on the above criteria, NWTT has placed its geographic markets into the following primary, secondary and emerging categories.

A comprehensive overview of each of our targeted geographic markets is outlined in Appendix A.



PRIMARY MARKETS



Canada



Japan



China



United States



South Korea



Germany

SECONDARY MARKETS



Australia



France

EMERGING MARKETS (Markets to watch)



Mexico





THE 2019/20 PLAN

MARKETING OBJECTIVES

- Grow NWT Visitation to 124,670 Visitors in 2019/20
- Increase Visitor expenditure to \$214,850 million in 2019/20
- Increase our database of pre-qualified, potential visitors by 25%
- Maintain market leadership in key categories by increasing numbers of Aurora, long haul driving and remote paddling visitors
- Maintain brand awareness for NWT in key Canadian target markets to levels measured in 2017
- Grow website visitation conversions to NWT based suppliers by 25% over 2018 measure
- Grow media earned value from \$1.6M to \$2.0M
- Establish a baseline of 10,000 engaged active users on social media



MARKETING CHANNELS

We will continue to use the multi-channel approach of previous years, capitalizing on past investments.

Travel Trade

The travel trade plays an important role in marketing the NWT in our key international marketplaces where consumer direct marketing is cost prohibitive and destination awareness is low. NWTT benefits from working with the travel trade as they have established sales networks and a loyal client base.

As part of the NWTT travel trade strategy, NWTT will attend key travel trade marketplaces, make sales calls, provide the travel trade with regular updates on export ready products in the NWT, host several travel trade professionals on FAM tours to the NWT and establish cooperative marketing partnerships with key trade accounts.

Travel Media

The travel media play a key role in promoting and selling tourism destinations. The media coverage by travel writers, bloggers and broadcast journalists enables a far greater reach than paid

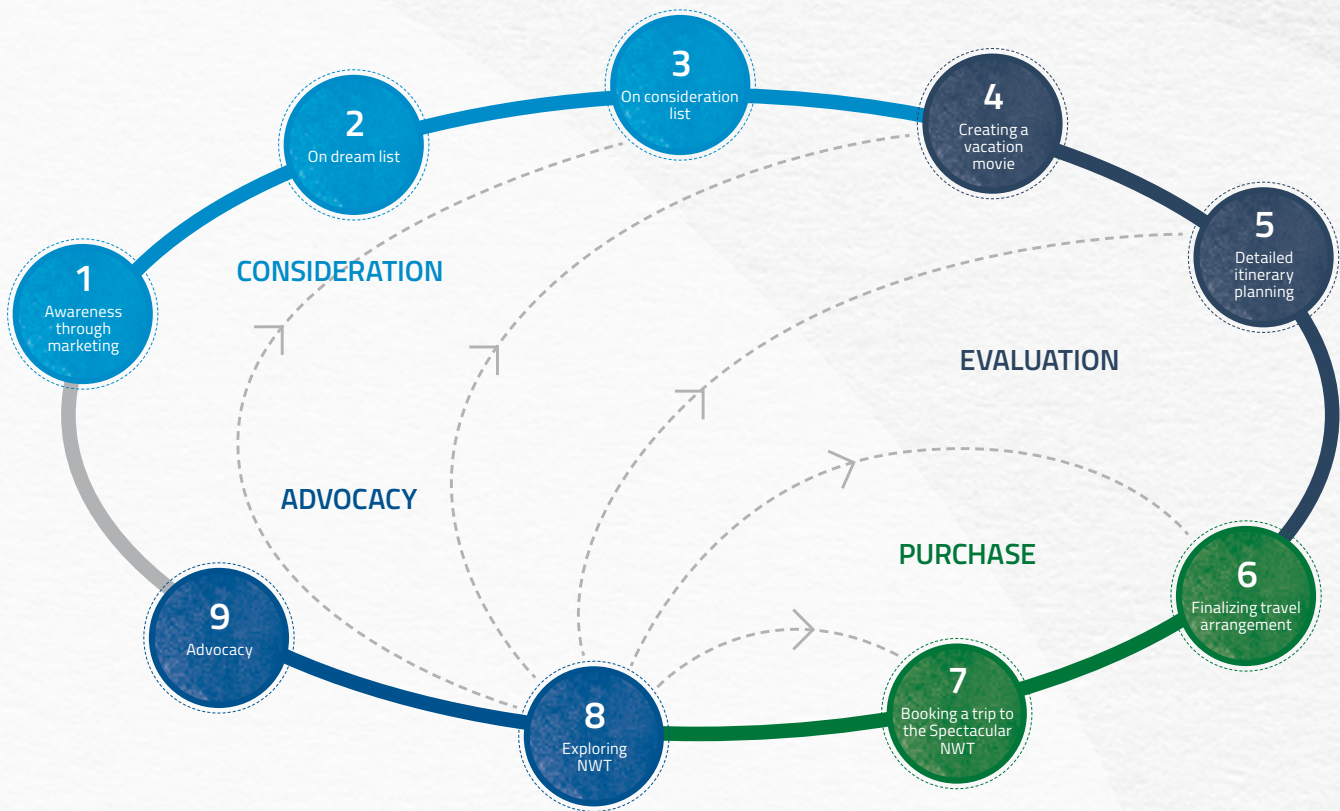
advertising, and it also provides a voice of authenticity with readers. The best way to build relationships with key travel media is to attend key travel media marketplaces organized by Destination Canada and to match qualified travel media to products their audiences are interested in following and host media familiarization tours to support their stories.

Meeting Conventions & Incentive Travel (MCIT)

MCIT plays a key role in generating business visitor revenues to the NWT. Marketing efforts focus on attracting mid to small size meetings and conferences and on promoting the NWT to incentive companies that are looking for innovative ways to reward their top clients. Key activities include attending key MCIT trade shows, hosting site visits for planners and assisting local partners with the submission of bids and/or proposals to host meetings and/or conferences in the Northwest Territories.

Consumer

Consumers remain the largest focus of our marketing efforts, with the primary consumer targets being potential visitors from elsewhere in Canada and in US markets. Content marketing is



the primary tactic we use across multiple vehicles to reach the consumer and we have increased our focus on ensuring a digital presence, year round.

MARKETING APPROACH & TACTICS

Our approach to implementing the 2019/20 NWT Marketing Plan will generally continue as it did the previous year. Our approach and related tactics are outlined below.

1. Always On / Alive in a Digital World

We will continue to use an “always on” digital approach. Digital marketing efforts will be continually optimized for improved reach, increased cost efficiency and strengthened data collection. This approach is favored by Destination Marketing Organizations because consumers are able to search for information at any time. It is important that our destination always has a significant online presence.

To effectively use digital marketing and attract visitors to our territory, we must understand our target audience’s mindset while they are making travel decisions. The path-to-purchase

model focuses on each stage in a consumer’s travel planning journey and helps us determine when it is most effective to intercept with our marketing efforts. The path-to-purchase can serve as a guide for knowing when to share engaging and compelling content with travellers to trigger reactions that lead to booking a trip to the NWT.

For example, if a person is looking at paddling experiences, we want the NWT’s paddling experiences to be high in the search, or we want to serve up a paddling ad that leads to NWT paddling experiences in our available marketing content. We do this through Search Marketing.

In order to reach the greatest number of travellers, our investment strategy for media will focus on creating breakthrough awareness. To do this we will use video content, social content and search. We have an opportunity to engage the digitally connected traveller and enable them to easily find the information they are seeking to visit the NWT. In order to increase the frequency so the NWT comes up in a related search, we must engage with search marketing monthly.

An always on approach means that NWTT will have digital advertising/content presence in market at all times. This allows NWTT to connect 24/7 with potential visitors who are looking for specific information that we can offer right while they are researching and planning their travel. This type of marketing employs the technical strengths of the following:

A. SEM (SEARCH ENGINE MARKETING)

This is the process of maximizing the number of visitors to a particular website, by ensuring that the site appears on the top of the search engine result pages through buying the relevant keywords. It requires constant shift of focus accordingly to the seasonality and frequent change of bidding strategy based on who we are up against at any given time for competition.

B. PROGRAMMATIC MEDIA BUYING

Programmatic Media Buying is an automated method of buying digital media that ensures advertisers are reaching the right person at the right time and in the right place. As the advertiser we pre-define purchase parameters. This type of advertising uses user interest data to target users independent of the content they are viewing online.

C. RETARGETING

These ads “follow” users who have previously visited the NWTT website. For example, if someone visited the main fishing page on the Spectacular NWT website (which indicates an interest in our fishing experiences), via retargeting, at a later time, that person will receive targeted ads from NWTT reminding them of NWT’s quality fishing and of relevant links to the NWTT site.

D. SEO (SEARCH ENGINE OPTIMIZATION)

This is the process of getting traffic from the “free,” “organic,” “editorial” or “natural” search results on search engines. It depends on the health of a website, keywords, rich, user friendly textual content and well optimized imageries aligned with ever-evolving search engine algorithms to outrank competitors gradually for the biggest share of the free traffic from search engines.

E. PAID SOCIAL

Delivers ads that are organic to the user experience. Facebook/Instagram can target users, by identifying their online social behaviour, and serving relevant content to

them in a seamless experience. The Facebook/Instagram page also serves as an additional online contact point, that users are familiar with, supported by the paid media.

By capitalizing on technology trends and using digital as our main content delivery method, we can enhance our marketing capabilities and reach our desired target audiences more easily and affordably. This is our opportunity to focus on the pervasiveness of user-generated content of the NWT, ready to be gathered, curated, and expanded upon. Our Agency’s team of content creation, marketing, advertising and social media specialists will respond dynamically to the needs of the marketplace and interactions with our target audiences. This will help us optimize high impact digital content and meet our audiences where they are.

Continuing our digital focus allows us to leverage our budget across multiple global markets and to complement users’ search habits during the decision-making process of destination travel.

2. Enhancing & Upholding our Brand to Maximize Destination Awareness

Our marketing will continue to build equity in the Spectacular NWT brand. The tourism industry is highly competitive, and destinations worldwide strive to distinguish themselves in the travel marketplace. To attract visitors to the NWT, it is important to continually enhance and uphold our brand with a unique NWT positioning that emphasizes our difference. It is also important to form emotional connections with potential traveller’s by introducing them to what our brand promises and ultimately luring them to the Northwest Territories by sharing the experiences of the NWT in an innovative and authentic way.

We will create and maintain destination awareness, positioning the Northwest Territories as a place full of spectacular experiences, untouched wonder, and the ultimate destination for the traveller seeking a story of a lifetime full of simplicity, surprise and awe.

3. Content Marketing

The tourism marketplace is always evolving and consumers are demanding a stream of new content that demonstrates inspirational imagery, video storytelling, third-party testimony,



as well as social evidence of the experiences we offer. To break through in a competitive market, our creative content needs to have impact.

NWTT was one of the first Canadian destinations to initiate a content marketing (storytelling) approach three years ago and will continue content marketing this year. A compelling brand positioning through content marketing is paramount to the success of any tourism destination. Our voice, tone, imagery and messaging influences people's perceptions of the NWT and provides a reason to choose the NWT over competitive destinations.

We will continue to create rich stories around authentic experiences. We will convince our audience that they should explore NWT travel options. We will balance the amount of content needed to show the breadth of the NWT, with the need

to provide breakthrough creative that will be remembered and stimulate action along the path to purchase an NWT travel experience. Our 'stories' element of the brand refresh made in 2015 will ring through in the content we produce.

4. Integration Across Channels

Our marketing efforts will continue to be integrated across channels as this proves to be more effective than multiple stand-alone campaigns. These efforts use SpectacularNWT brand and integrate regional marketing with core destination marketing.

Digital content marketing all comes together as we deliver our message across multiple channels and track our results. In-market testing done in real time allows us to pivot and adjust marketing visuals and messages if our advertising is not performing to expectations.

Traditional media is still part of our strategy and is used to integrate messages and images more broadly. This approach has focused on building brand and destination awareness which our 2017 research indicates has increased.

5. Securing Market Share For Core Products

Through all marketing efforts, we will aim to increase market share for our core products. For our Aurora product, we are experiencing increased competition from both Canadian and international destinations. In addition to stressing that our Aurora are scientifically the best, we will use digital techniques and market intelligence to ensure that people looking for Aurora viewing are immediately directed or redirected to the Northwest Territories. Further, we will be able to use micro targeting digital techniques to make our fishing product stand out in a competitive marketplace.

6. Enhancing E-marketing

E-marketing is a powerful tool for reaching potential visitors. Currently NWTT issues an e-newsletter quarterly. Approximately 29,000 people have “opted” to receive this newsletter, making them a pre-qualified “NWT interest” group. An enhanced e-marketing program could include increased mailing frequency, wider range of content (types and topics) and strengthening interactive components. It could also provide invaluable market intelligence regarding the likes and buying habits of a group that are already on the path to purchase.

The objectives of this e-marketing program would be to increase the number of subscribers to the existing e-newsletter, increase the “open” rate and reader engagement and move readers along the path to purchase. NWTT will also learn more about our audience’s interests and directly address those interests, while building a valuable list of potential visitors, divided by interest, for ongoing, direct marketing use.

7. Encourage Regional Visitation

More than 70% of all NWT visitors spend at least some time in Yellowknife. This occurs because Yellowknife is the main connecting airport for flights from the south, Yellowknife’s larger population means more visiting friends and relatives and of course, as a capital city, Yellowknife has more services and facilities to offer the visitor. However, Yellowknife is nearing visitor

capacity in peak Aurora seasons, and this provides an excellent opportunity for alternate locations to capture a portion of these visitors.

NWTT will continue to market major attractions across the Northwest Territories and where possible (content marketing, digital), continue to suggest expanded itineraries for Yellowknife visitors that include visits to additional communities or attractions.

8. Co-marketing

Co-marketing, sometimes called co-branding, is a relatively new, but fast-growing, marketing approach. If implemented properly, it can double results at half the cost. Co-marketing is a partnership between two or more companies where both companies promote a campaign, split the costs and share the benefits. Co-marketing can have significant impacts which include access to new targeted audiences for NWT travel products, increased market reach, and more sales leads.

Co-marketing requires that NWTT select partners whose audience will resonate with an NWT product and at the same time that our audience will resonate with their product. Shared target audiences must be made up of similar personas – i.e. outdoor adventure product suppliers, planetariums, fishing equipment manufacturers – all of which cannot be in direct competition with our destination. As part of the partnership program outlined in the five-year marketing strategy, we plan to test one to two smaller co-marketing efforts in the upcoming fiscal year.

9. Influencer Marketing

Influencer marketing is a technique that while relatively recent already accounts for up to 25% of a brand’s marketing budget. Influencer marketing can be effective because people are more likely to consider a product purchase when it has been presented or recommended by someone they trust and know. Depending on the influencer, a marketer can gain access to a large targeted market.

As in co-marketing, finding the right influencer (someone who is passionate about our brand and has access to an audience we want to reach) is the initial step in the process. NWTT has identified a key influencer for one of the NWT’s flagship assets and is pursuing a strategic partnership in this area.

Northwest Territories Tourism Activities by Channel

ACTIVITIES	CONSUMER	TRAVEL TRADE	MEDIA	MCIT
Guide	Explorers': Lure Only			Conference: Update
Tradeshows	Minimum 4	Minimum 4	Minimum 2	Minimum 4
Advertising: Print	Limited	Limited		Limited
Advertising: Digital	Ongoing	Limited		Limited
Advertising: Co-op	Member offers	Min 1 per market		
Memberships		CITAP	TMAC	CSAE, MPI
Visual Assets	35000 (+ 1000)	1500 (+ 100)	CANTO/Media Miser/Adobe Suite	1500 (+ 20)
ENGLISH LANGUAGE:				
Website Content	Weekly	On Demand	On Demand	On Demand/Update
Social Media	Daily			
FAM program, North America		1 Qualified Trade	5 Qualified Media 1 Influencer	5 Qualified Planners (Canada)
FAM program: Australia		1 Qualified Trade	1 Qualified Media	
Newsletter	Min. Quarterly	On Demand	On Demand	
JAPANESE LANGUAGE:				
Website Content	Maintain/Monthly	Quarterly		
Social Media	Facebook; Monthly			
FAM program		1 Qualified Trade	1 Qualified Media	
Newsletter		Semi-Annually		
CHINESE LANGUAGE:				
Website Content	Redirect: Weibo			
Social Media	Weibo, Wechat Bi-Weekly			
FAM program		1 Qualified Trade	1 Qualified Media	
GERMAN LANGUAGE:				
Website Content	Redirect: Domestic Site	Twice Annually		
Social Media	Facebook; Weekly			
FAM program		1 Qualified Trade	1 Qualified Media	
Newsletter		Quarterly		
KOREAN LANGUAGE:				
Website Content	Redirect: Korean Facebook	Annually		
Social Media	Facebook; Monthly/Neevo			
FAM program		1 Qualified Trade	1 Qualified Media	
FRENCH LANGUAGE:				
Website	Maintain/Monthly			
Social Media	Monthly			

Northwest Territories Tourism Annual Activity Calendar

ACTIVITY	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
NWTT	New Membership Year		Tourism Week			
Content Overview (Website, Digital ads, eNWT, Social)	General Touring E-Newsletter		Festivals	E-Newsletter: Parks	Fall Aurora	
Explorer's Guide		Concepts	Design Concept Presented		Editorial Completed	
Other Print						
Consumer Shows						
MCIT Shows			Incentive Canada		Incentive Works	
Fams/Sites MCIT			Mid-June-end of August - High Season			
Media Shows			Travel Media Assoc. Canada		GoMedia	
Travel Trade		RVC Canada-Toronto		Canadian Signature Experience Intake Trade Newsletter		
FAM Tours Media & TT	BLACKOUT		summer high season			
Japan						
Germany						
China						
South Korea						
Australia						

	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH
		AGM & Conference Yellowknife 2019				
	Winter Aurora & Activities E-Newsletter: Aurora	E-Newsletter: Winter Adventure Aurora		Paddling/Fishing/ Touring/Parks E-Newsletter: Road Trips	Paddling/Fishing/ Touring/Parks	Paddling/Fishing/Touring/Parks
	Draft Proofing	Sign Off/Upload	Consumer Show Bulk Shipping		Visitor Centre Bulk Shipping	
					Globe & Mail	
					Toronto Outdoor Adv Show	Vancouver Outdoor Adv Show, Toronto Sportsman Show, Calgary Outdoor Adv Show, Montreal Outdoor Adv Show
	CSAE National Conference			Tete a Tete Go West		
	Showcase Canada - Asia, Focus Japan	Canadian Signature Experience Intake	CITAP - Vancouver	Trade Newsletter		
	BLACKOUT		winter high season			
	Focus Japan	GSA Sales call completions	CITAP - Vancouver & Sales Calls			
		GSA Sales call completions				ITB Berlin, Germany
	Showcase Canada - Asia (China)	GSA Sales call completions	CITAP - Vancouver & Sales Calls			
			CITAP - Vancouver & Sales Calls			





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, Germany (German speaking Europe), Japan, China, South Korea, Australia. All channels are used to reach the targeted audience with a variety of marketing activities as identified geographically dependent on the target profiles and how best to reach them.

Northwest Territories Tourism 2019/20 Marketing Budget

2019/20 Marketing Budget Projects Summary		Contribution Agreements			Marketing	
Project Name	Budget	Marketing	Parks	Tourism 2020	Consumer	Media
Call Centre						
Mail and Delivery	\$ 40,500.00	\$ 40,500.00	\$ -	\$ -	\$ 40,500.00	\$ -
Service Supplies	\$ 1,000.00	\$ 1,000.00			\$ 1,000.00	
Toll Free Telephone	\$ 10,000.00	\$ 10,000.00			\$ 10,000.00	
Upgrades to System	\$ 10,500.00	\$ 10,500.00			\$ 10,500.00	
Total Call Centre (\$62,000)	\$ 62,000.00	\$ 62,000.00			\$ 62,000.00	
Consumer Show Program						
Shipping, Freight and Courier	\$ 3,300.00	\$ 3,300.00			\$ 3,300.00	
Show Fees and Services	\$ 40,600.00	\$ 40,600.00			\$ 40,600.00	
Supplies	\$ 1,000.00	\$ 1,000.00			\$ 1,000.00	
Consumer Show Travel	\$ 11,200.00	\$ 11,200.00			\$ 11,200.00	
Total Consumer Show Program (\$56,100)	\$ 56,100.00	\$ 56,100.00			\$ 56,100.00	
Agency Contracts						
Project Management	\$ 76,000.00	\$ 76,000.00			\$ 71,000.00	\$ -
Europe (Germany)	\$ 70,000.00	\$ 70,000.00			\$ 35,000.00	
Asia Pacific (Japan)	\$ 64,000.00	\$ 64,000.00			\$ 14,000.00	
Total Agency Contracts (\$210,000)	\$ 210,000.00	\$ 210,000.00			\$ 120,000.00	
Communications						
Media Show Fees	\$ 10,700.00	\$ 10,700.00				\$ 10,700.00
Media Familiarization Tours	\$ 70,000.00	\$ 70,000.00			\$ -	\$ 70,000.00
Media Events and Promotions	\$ 3,000.00	\$ 3,000.00				\$ 3,000.00
Newsletters and Publications	\$ 1,500.00	\$ 1,500.00			\$ 750.00	\$ 750.00
Photography Contracts	\$ 70,000.00	\$ 70,000.00			\$ 40,000.00	\$ 20,000.00
Supplies and Materials	\$ 17,000.00	\$ 17,000.00				\$ 17,000.00
Media Show Travel	\$ 10,000.00	\$ 10,000.00				\$ 10,000.00
Total Communications (182,200)	\$ 182,200.00	\$ 182,200.00			\$ 40,750.00	\$ 131,450.00
Marketing						
General Advertising - Core	\$ 889,500.00	\$ 889,500.00			\$ 877,500.00	
Tourism 2020 (\$370,000)	\$ 370,000.00	\$ 120,000.00	\$ -	\$ 250,000.00	\$ 370,000.00	
Special Projects (\$220,000)	\$ 220,000.00	\$ 100,000.00	\$ -	\$ 120,000.00	\$ 220,000.00	
Brochure Development (\$92,500)	\$ 92,500.00	\$ 92,500.00			\$ 85,000.00	
Business Meetings (\$3,000)	\$ 3,000.00	\$ 3,000.00				
Promotional Materials (\$23,000)	\$ 23,000.00	\$ 23,000.00			\$ 10,000.00	\$ -
Research and Exit Survey (\$40,000)	\$ 40,000.00	\$ 40,000.00			\$ 40,000.00	
Trade & MCIT Travel (\$66,800)	\$ 66,800.00	\$ 66,800.00			\$ 8,000.00	\$ -
Trade & MCIT Familiarization Tours	\$ 54,500.00	\$ 54,500.00			\$ -	\$ -
Trade Shows Registration & Fees	\$ 58,100.00	\$ 58,100.00				
Digital Development	\$ 336,845.00	\$ 336,845.00			\$ 311,845.00	
Total Marketing (2,154,245)	\$ 2,154,245.00	\$ 1,784,245.00	\$ -	\$ 370,000.00	\$ 1,922,345.00	\$ -
Market Ready Training						
AGM Logistics	\$ 10,000.00	\$ 10,000.00	\$ -		\$ 10,000.00	
Venue Expenses	\$ 10,000.00	\$ 10,000.00			\$ 10,000.00	
Speaker Travel (AGM)	\$ 10,000.00	\$ 10,000.00			\$ 10,000.00	
Speaker Fees and Expenses	\$ 10,000.00	\$ 10,000.00			\$ 10,000.00	\$ -
Total Market Ready Training (40,000)	\$ 40,000.00	\$ 40,000.00			\$ 40,000.00	\$ -
Total Budget	\$ 2,704,545.00	\$ 2,334,545.00	\$ -	\$ 370,000.00	\$ 2,241,195.00	\$ 131,450.00

Channel										
Travel Trade	MC&IT	Canada	Japan	Germany	China	USA	Australia	Korea	France	Emerging Markets
\$ -	\$ -	\$ 36,000.00	\$ 2,000.00	\$ 2,500.00						
		\$ 1,000.00				\$ -				
		\$ 7,500.00				\$ 2,500.00				
		\$ 10,500.00	\$ -	\$ -		\$ -				
		\$ 55,000.00	\$ 2,000.00	\$ 2,500.00	\$ -	\$ 2,500.00	\$ -	\$ -	\$ -	\$ -
		\$ 3,300.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		\$ 40,600.00	\$ -							
		\$ 1,000.00								
		\$ 11,200.00	\$ -							
		\$ 56,100.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
\$ -	\$ 5,000.00	\$ 76,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
\$ 35,000.00				\$ 70,000.00						
\$ 50,000.00			\$ 64,000.00							
\$ 85,000.00	\$ 5,000.00	\$ 76,000.00	\$ 64,000.00	\$ 70,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		\$ 5,350.00	\$ -	\$ -	\$ -	\$ 5,350.00	\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ 15,000.00	\$ 10,000.00	\$ 10,000.00	\$ 15,000.00	\$ 5,000.00	\$ 7,500.00	\$ 7,500.00	\$ -	\$ -
		\$ 3,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ 1,500.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
\$ -	\$ 10,000.00	\$ 70,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		\$ 17,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		\$ 5,950.00	\$ -	\$ -	\$ -	\$ 4,050.00	\$ -	\$ -	\$ -	\$ -
\$ -	\$ 10,000.00	\$ 117,800.00	\$ 10,000.00	\$ 10,000.00	\$ 15,000.00	\$ 14,400.00	\$ 7,500.00	\$ 7,500.00	\$ -	\$ -
\$ -	\$ 12,000.00	\$ 547,000.00	\$ 112,500.00	\$ 60,000.00	\$ 125,000.00	\$ -	\$ 20,000.00	\$ 25,000.00	\$ -	
		\$ 370,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
		\$ 172,500.00	\$ -	\$ -	\$ -	\$ 47,500.00	\$ -	\$ -	\$ -	
\$ 5,000.00	\$ 2,500.00	\$ 92,500.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
\$ 2,000.00	\$ 1,000.00	\$ 3,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
\$ 10,000.00	\$ 3,000.00	\$ 17,000.00	\$ 3,000.00	\$ 3,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		\$ 40,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
\$ 50,100.00	\$ 8,700.00	\$ 29,700.00	\$ 15,100.00	\$ 5,000.00	\$ 8,500.00	\$ -	\$ 4,000.00	\$ 4,500.00	\$ -	\$ -
\$ 42,500.00	\$ 12,000.00	\$ 12,000.00	\$ 10,000.00	\$ 5,000.00	\$ 10,000.00	\$ -	\$ 6,000.00	\$ 6,500.00	\$ -	\$ 5,000.00
\$ 41,500.00	\$ 16,600.00	\$ 30,100.00	\$ 5,000.00	\$ 7,000.00	\$ 5,500.00	\$ -	\$ 5,500.00	\$ 5,000.00	\$ -	\$ -
	\$ 25,000.00	\$ 192,845.00	\$ 16,000.00	\$ 6,000.00	\$ 80,000.00	\$ 20,000.00	\$ -	\$ 16,000.00	\$ 6,000.00	\$ -
\$ 151,100.00	\$ 80,800.00	\$ 1,506,645.00	\$ 161,600.00	\$ 86,000.00	\$ 229,000.00	\$ 67,500.00	\$ 35,500.00	\$ 57,000.00	\$ 6,000.00	\$ 5,000.00
		\$ 10,000.00								
		\$ 10,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
		\$ 10,000.00								
\$ -	\$ -	\$ 10,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ 40,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
\$ 236,100.00	\$ 95,800.00	\$ 1,851,545.00	\$ 237,600.00	\$ 168,500.00	\$ 244,000.00	\$ 84,400.00	\$ 43,000.00	\$ 64,500.00	\$ 6,000.00	\$ 5,000.00

APPENDIX A: GEOGRAPHIC MARKETS

LEGEND

C Consumer and Call Centre

M Media

TT Travel Trade

MCIT Meetings, Conventions
and Incentive Travel

B Business

T General Touring

O Outdoor Adventure

V Visiting Friends and Relatives

F Fishing

H Hunting

A Aurora

CANADA



POPULATION: 35.2 MILLION
GDP: RANKED 10TH LARGEST ECONOMY IN THE WORLD

EQ TRAVEL SEGMENTS:
Free Sprints 12%, Cultural Explorers 9%, Authentic Experiences 12%, Gentle Explorers 25%

Like most other travel destinations across the country, Canada is the primary market for the Northwest Territories, resulting in between 60% to 80% of travellers to the NWT. Global Tourism Watch sets 2018 Canadian Visitor potential at 9,570,000. With current safety issues around the world, many Canadians are choosing to travel at home. The celebrations associated with Canada's 150th birthday encouraged Canadians in 2017 to explore their own country instead of travelling

abroad. The marketing efforts of NWTT have focused on increasing awareness of the Northwest Territories, and the number of visitors to the territory is at an all-time high.

Travel from all of the major cities in Canada can easily be completed in one day. While the cost to travel to Yellowknife is more expensive than most southern cities in Canada, competition between the major airlines results in seat sales on a fairly regular basis.

RECEPTIVE TOUR OPERATORS (RTO'S):
Discover Holidays, Jonview, JAC, Entrée Destinations, Fresh Tracks, Anderson Vacations

TRAVEL TRADE SHOWS: Rendez-Vous May 2019 hosted by Destination Canada

MEDIA TRADE SHOW: GoMedia Canada (National and International Media) date to be determined

CONSUMER TRADE SHOWS: Toronto Outdoor Adventure Show, Toronto Sportsman Show, Calgary Outdoor Adventure Show, Montreal Outdoor Adventure Show, Ottawa Travel and Adventure Show, Vancouver Outdoor Adventure Show

MCIT: Incentive Canada, IncentiveWorks, CSAE, Tête a Tête, Go West

STRATEGY: Content Approach, lead by editorial calendar with focus on planning/ booking cycle, repurpose top content, deeper with more content and less publishers, integrate messaging social/ digital/tradeshows.

UNITED STATES



POPULATION: 325.4 MILLION
GDP: 18.5 TRILLION USD – RANKED 1ST LARGEST ECONOMY IN THE WORLD

EQ TRAVEL SEGMENTS:
Free Sprints 14%, Cultural Explorers 9%, Authentic Experiencers 14%

The United States is Canada's biggest source of international visitors. In 2017, 14.3 million visitors generated roughly 48% of Canada's international tourism revenue. More than 8% of potential travellers to Canada expressed an interest in visiting Canada's north. Those considering a trip to Canada are more likely to have visited previously. Global Tourism Watch sets the 2018-2019 US visitor potential at 53 million.

In 2017 air arrivals were up 17% over the previous year, resulting in 14.3 million air arrivals in 2017. Visitors from the US skew slightly older, with ages 55+ accounting for 48% of the arrivals. Ontario and British Columbia are the two most popular destinations among US travellers, but US travellers are avidly exploring all regions of Canada. Americans seem to be drawn more to Canada's major cities than its landscapes, but the Yellowknife area is seeing more visitors from the US, particularly during Aurora season.

Air access from most major cities in the US can be completed in one day. Most US destinations connect through Toronto, Montreal, Calgary or Vancouver, before making the remaining journey

to Yellowknife via Edmonton, Calgary, Vancouver or Ottawa.

TRAVEL TRADE SHOW: None planned

MEDIA TRADE SHOW: None planned

STRATEGY: Content Approach, Lead by editorial calendar, repurpose top content, focus on purpose: angling, paddling, general touring. Paid traffic drivers – social. Co-branded assets in collaboration with Destination Canada.

NWT'S TRAVEL TRADE KEY ACCOUNTS:
Collette, Road Scholar, Globus, The Ensemble Group



JAPAN



POPULATION: 126.7 MILLION
GDP: JAPAN IS RANKED 3RD LARGEST ECONOMY IN THE WORLD

EQ TRAVEL SEGMENTS:

Free Spirits 12%, Cultural History Buffs 16%

In 2017, 304,000 Japanese tourists visited in Canada, spending on average just over \$2000. Despite gradual growth in Japan's GDP, and consumer expenditures, the decreasing value of the Yen relative to the Canadian dollar may have contributed to limited market growth. Global Tourism Watch sets Japanese market potential visitation to Canada at 2.5 million.

The Japanese have been travelling to Yellowknife for over 30 years now. The destination is well known in Japan. The

Aurora and natural attractions are the big travel motivators from the group.

Air access from Japan to Canada has increased this past year, with new flights from Osaka to Vancouver. With Air Canada adding direct flights between Vancouver and Yellowknife, air travel to Yellowknife will be more convenient. Several years ago, direct flights were added between Tokyo and Calgary, which also made travel to Yellowknife more efficient.

When working with the Japanese market it is important to know that most visitors prefer to have a Japanese-speaking guide for their tours, and some will request specialty food during their stay.

TRAVEL TRADE SHOWS: Focus Japan, CITAP Vancouver. The importance of this

market to NWT requires an annual trade update. Partners will be sought in-market to maximise efficiency of a sales and training visit.

STRATEGY: Ensure seasonality of the message to fit the planning and booking timelines reflected for each trade and consumer focused messaging. Drive consumer demand through fresh Japanese language content promoted on multiple channels to maximise reach and efficiency of tactics. Ensure strong long-term relationships are nurtured with travel agents and key trade partners. Maintain GSA in market.

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



CHINA



POPULATION: 1.4 BILLION
GDP: CHINA IS THE WORLD'S 2ND LARGEST ECONOMY (15% OF GLOBAL GDP)

EQ TRAVEL SEGMENTS:

Free Spirits 17%, Cultural Explorers 8%

China is Canada's third largest market in terms of arrivals, and second in terms of visitor spending. 2017 was a record year for travel to Canada, with 682,000 visitor arrivals from the Chinese market. Strong economic growth and a rapidly growing middle class has resulted in projections of a further growth in 2018. Global Tourism Watch sets market potential visitation to Canada in 2018-2019 at 10.93 million. The visiting friends and relative market (VFR) is a main driver for Chinese visitation to Canada, with 47% of Chinese visitors

coming to Canada to visit friends and relatives. This often results in further visitation to other areas of Canada.

There is excellent air access from China to Canada, with direct flights between most major cities in China into Vancouver, Toronto and Calgary. Most Chinese visitors to the NWT typically stay for three nights. Some Chinese travellers who have visited the Yellowknife area, have stayed longer and have expressed an interest in visiting areas outside of Yellowknife.

Catering to the Chinese market will have its own set of challenges. While most Chinese travellers to Canada can speak adequate English, communication with locals can be challenging.

TRAVEL TRADE SHOWS: Showcase Canada-Asia, CITAP

STRATEGY: Lead with digital content and leverage this in building consumer awareness, repurpose Chinese language content for trade marketing and training. Chinese language website continues to redirect to social media accounts held in China for enhanced visibility and speed. Continue current marketing agency agreement and leverage core investments for specialty programs to grow awareness. Push Chinese payment platforms to increase expenditure while in destination.



SOUTH KOREA



POPULATION: 51.4 MILLION
GDP: RANKED 11TH LARGEST ECONOMY IN THE WORLD (1.9% OF GLOBAL GDP)

EQ TRAVEL SEGMENTS:
Free Spirits 11%, Cultural History Buffs 16%

A thriving economy, a favourable currency, and increased air capacity supported a 17% increase in travel to Canada in 2017. Air capacity between South Korea and Canada increased by 38% last year. This included Air Canada flights to Vancouver and Toronto. Pleasure travel made up 31% of all trips to Canada. Most visitors

engaged in fully independent travel (FIT) and sought experiences showcasing Canada's unique natural and cultural settings. Approximately 21% of potential visitors to Canada expressed an interest in visiting Canada's north. 68% were solo, more than any of our other target markets.

Most travellers from South Korea are fairly independent, but some will require Korean-tour guides

TRAVEL TRADE SHOWS: CITAP Vancouver

STRATEGY: Build on awareness of destination in market through social media content and responsiveness. Website will continue to redirect to social media accounts. Build content to manage brand and build consumer awareness which can be repurposed to trade training and product knowledge. Lead with digital to consumers, maintain multiple trade relationships to support travel trade selling destination.

NWT KEY TRAVEL TRADE ACCOUNTS:
Pharos Travel, Hana Tour, Mode Tour, Prime



GERMANY



POPULATION: 82.3 MILLION
GDP: RANKED 4TH LARGEST ECONOMY IN THE WORLD

EQ TRAVEL SEGMENTS:
Free Spirits 12%, Cultural Explorers 17%, Authentic Experiencers 13%

According to DC research, Canada currently ranks third, behind the United States and Thailand, in terms of consideration for a long haul vacation by German travellers. In 2017, over 388,000 Germans visited Canada. Germans are a good fit for travel to Canada, as they typically have longer annual vacations

than most countries around the world. Germans typically received five to six weeks of annual vacation and are avid travellers. German travellers also have a significant interest in the north, with 16% of the immediate market potential for Canada indicating they would like to visit Canada's north. They also prefer nature to cities.

Air access from Germany to Canada is excellent. Airline seat capacity increased by 6% in 2016 and an additional 10% in 2017. Germans are typically adventurous travellers and independent by nature. Most speak enough English that they do

not require the use of interpreter while travelling. Germans tend to plan their trips well in advance, often four months prior to booking.

STRATEGY: Focus on driving value and prove return from market with increased reported visitation and research. Maintain relationships with trade and drive consumer interest through social media accounts while redirecting website traffic. Maintain GSA in market.

NWT KEY TRAVEL TRADE ACCOUNTS:
CanUSA Touristic, SK Touristic, Dertour, Travel House/Hotel Plan (CH)



AUSTRALIA



POPULATION: 24.7 M
GDP: RANKED 13TH LARGEST ECONOMY
(1.9% OF GLOBAL GDP)

EQ TRAVEL SEGMENTS:
Free Spirits 16%, Cultural Explorers 15%,
Social Samplers 14%

Australians are avid travellers and are willing to part with their money for a dream vacation. In 2017, Canada welcomed 375,000 visitors from Australia, an increase of 13%. There was also an increase in air capacity to Canada of 29%. Global Tourism Watch sets the 2018-2019 market potential for Canada at 2.6 million visitors. The majority of Australian visitors first arrive in Vancouver. British Columbia, Alberta and Ontario are the most visited destinations. There is a growing interest in winter tourism and the Aurora from the Australian market.

There is excellent air access from Australia to Canada, with direct flights between Sydney, Brisbane and Melbourne into Vancouver. The average Australian visits Canada for 15 – 20 days, and tours a number of regions.

In general, Australians are low maintenance travellers. They are willing to forgo luxury for an authentic experience, provided the experience delivered is what was promised. There are also no language barriers, associated with other international markets.

TRAVEL TRADE SHOWS: The primary travel trade show is Corroboree. The event takes place in February every two years. The show is set to take place in 2021. NWT will reach out to key trade accounts from Australia that attend Rendezvous Canada and will look at hosting a webinar to provide new product updates to tour

wholesalers and travel agents.

STRATEGY: Unique content aligned with product available through travel trade, that speaks to more than one target. Repurposing domestic content to meet targeted interest: Unique wildlife experiences, quirky festivals and increased 'listicles', with content being used in multiple formats to increase consumer interest and product knowledge. Maintain co-op partnerships to provide a platform for operators to sell with trade in Australia, while driving consumer awareness through media partnerships and social media advertising to meet planning and booking cycles for this market.

NWT KEY TRAVEL TRADE ACCOUNTS:
Adventure World, Discover Holidays,
Adventure Destinations



FRANCE



POPULATION: 67.1 MILLION
GDP: RANKED 7TH LARGEST ECONOMY
(1/5 OF EURO AREA GDP)

EQ TRAVEL SEGMENTS:
Free Spirits 8%, Cultural Explorers 14%,
and Cultural History Buffs 12%

France remains one of the largest overseas markets for Canada. In 2016, over 545,000 people from France visited Canada. This is up 9% from the previous year. Canada is well positioned to attract more visitors from France, as Canada ranked second (behind the United

States) as their next potential long-haul destination. Canada is perceived as having beautiful scenery and welcoming people. The main reason for travel to Canada for the majority of French travellers is to visit family and friends or for recreation purposes.

While the majority of French travellers visited Quebec and Ontario, expanded air capacity to British Columbia and Alberta is helping to drive visitation to other areas of Canada. According to DC's research, one in four travellers to Canada use travel agents to help plan their trip.

NWT'S TRAVEL TRADE KEY ACCOUNTS:
Air Transat, TUI France, Kuoni, Jet Set
Travel Trade Shows: Top Resa

STRATEGY: The primary strategy will be to promote the NWT's export ready products through the travel trade. This will be done via appointments with French tour wholesalers during Rendezvous Canada. There is also an opportunity to leverage the support of CDETNO as the local francophone organization actively markets the NWT at a number of special events and trade shows that take place in France each year.



MEXICO



POPULATION: 123.7 MILLION
GDP: RANKED 15TH LARGEST ECONOMY IN THE WORLD, AND SECOND LARGEST IN LATIN AMERICA, WITH 1.4% OF THE GLOBAL GDP SHARE.

EQ TRAVEL SEGMENTS:

Free Spirits 15%, Cultural History Buffs
10% Authentic Experiencers 11%

Following the removal of the mandatory travel visa requirements, Mexican visitors to Canada increased by 47%. Much of this growth has also been attributed to a significant increase (71%) in direct air access to Canada. The average trip spend by Mexican tourists is approximately \$1,900, with an average trip length of 18

nights. In terms of past visitation, 37% of Mexican long-haul travellers have indicated they have visited Canada for a leisure trip at some point in their lifetime.

Mexican travellers prefer to visit Canada during the summer months, but also express interest in visiting during the winter season. As part of the research findings from DC's 2017 Global Tourism Watch research program, 43% of Mexicans identified Northern Lights as being an important enough activity to base their entire trip around. This was the highest ranked activity in the survey, with the natural attractions like mountains or waterfalls coming in as the second choice at 32%.

STRATEGY: This emerging market is showing interest and some visitation in the NWT. Supporting partnered activities with Alberta into Mexico will enable testing of the market opportunity and growing our understanding regarding the purpose driving visitor interest in our destination.

TRAVEL TRADE SHOWS: None planned at this time

APPENDIX B: PSYCHOGRAPHIC MARKETS



WEST
TERRITORY

FREE SPIRITS

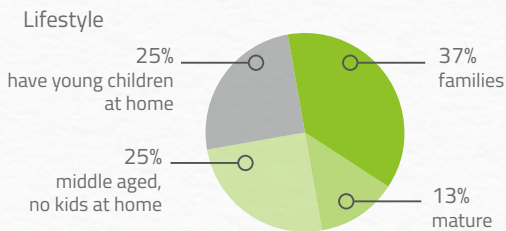
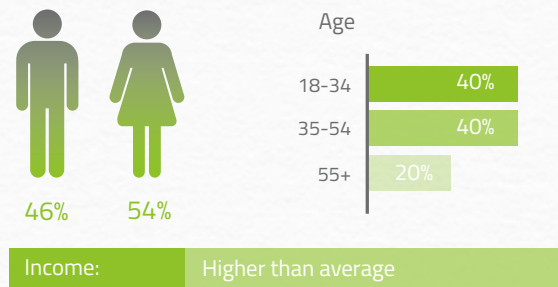
13% OF GLOBAL MARKET

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

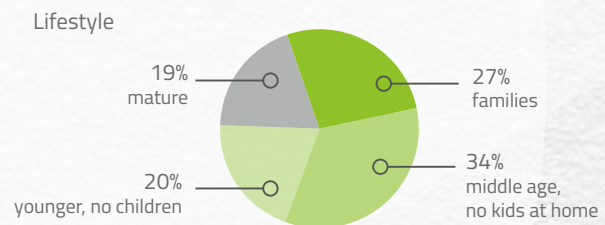
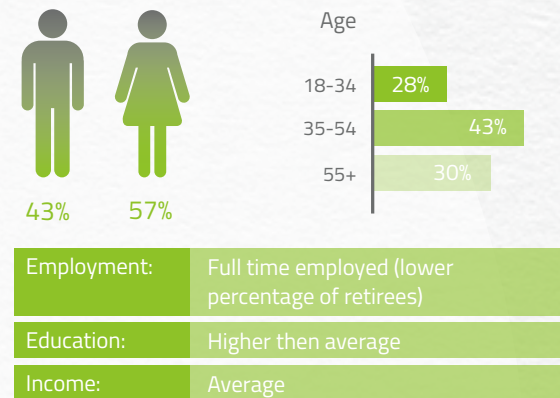
12% OF GLOBAL MARKET

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



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 EXPERIENCES:

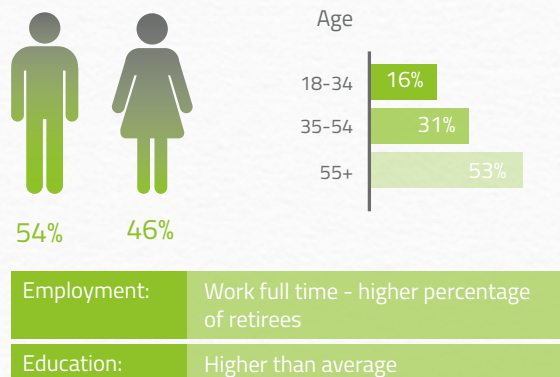
9% OF GLOBAL MARKET

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

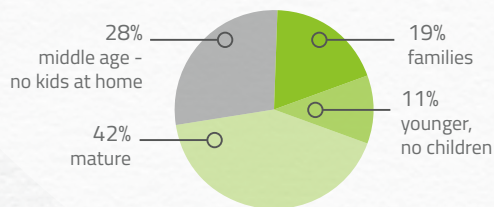
SOCIAL VALUES

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

DEMOGRAPHICS



Lifestyle



TRAVEL VALUES

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

NO HASSLE TRAVELLER

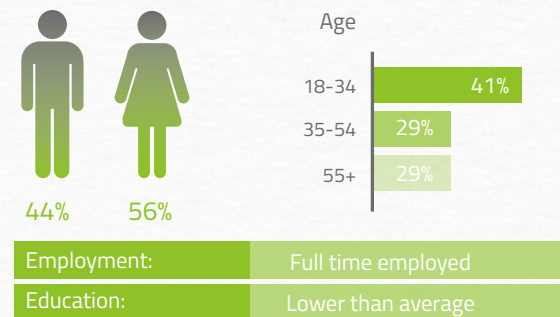
11% OF CANADIAN MARKET, 10% OF AUSTRALIAN MARKET

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

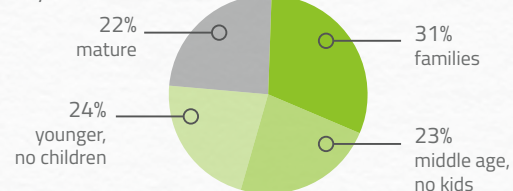
SOCIAL VALUES

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

DEMOGRAPHICS



Lifestyle



TRAVEL VALUES

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

SOCIAL SAMPLER

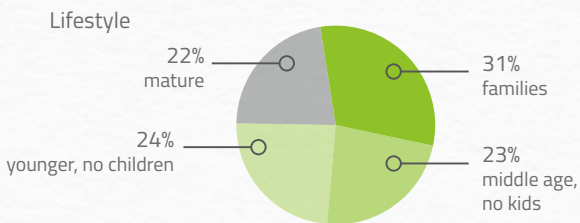
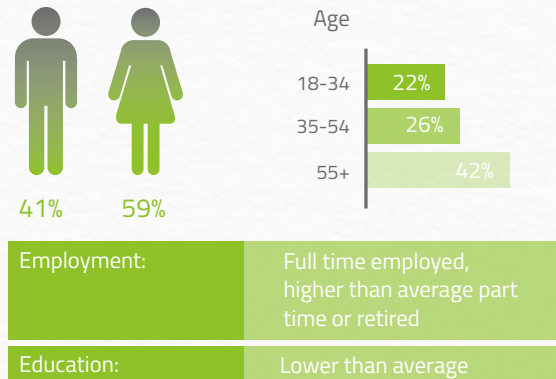
14% OF AUSTRALIAN MARKET

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

SOCIAL VALUES

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

DEMOGRAPHICS



TRAVEL VALUES

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

PERSONAL HISTORY EXPLORER

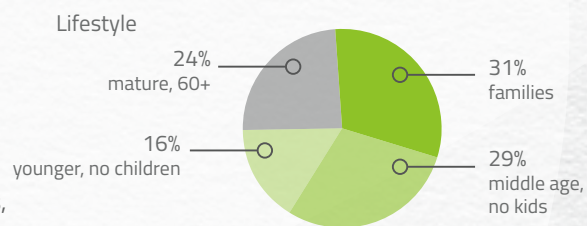
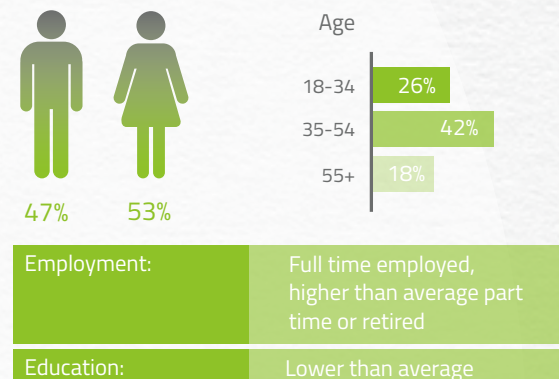
13% OF CANADIAN MARKET, 14% JAPANESE MARKET, 10% SOUTH KOREAN MARKET

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 savor 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

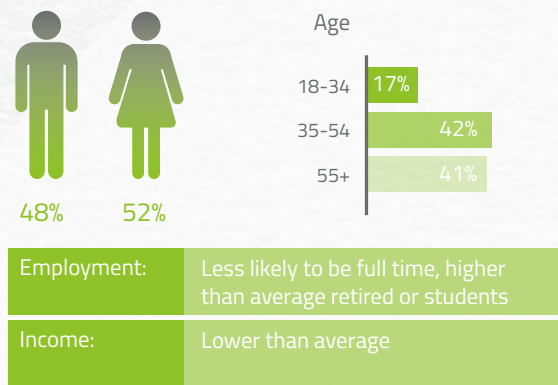
6% OF CANADIAN MARKET,

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

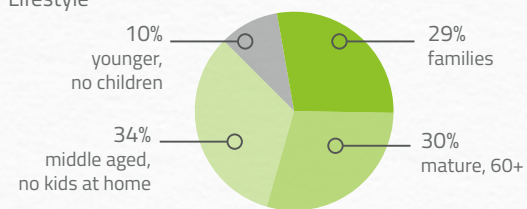
SOCIAL VALUES

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



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

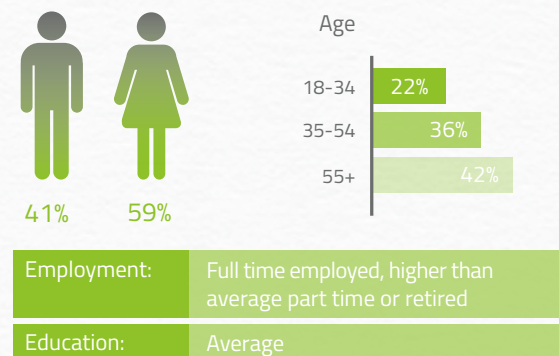
25% OF CANADIAN MARKET

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.

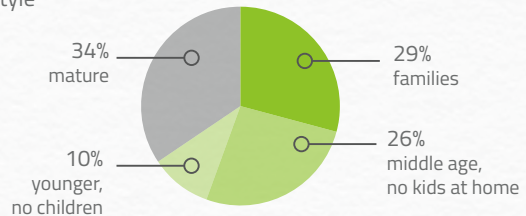
SOCIAL VALUES

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

DEMOGRAPHICS



Lifestyle



TRAVEL VALUES

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

CULTURAL HISTORY BUFFS

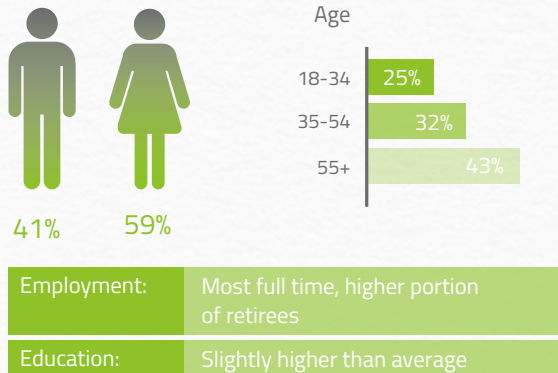
12% FRANCE MARKET, 16% JAPAN MARKET, 16% SOUTH KOREAN MARKET

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.

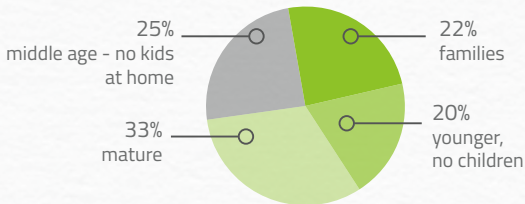
SOCIAL VALUES

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

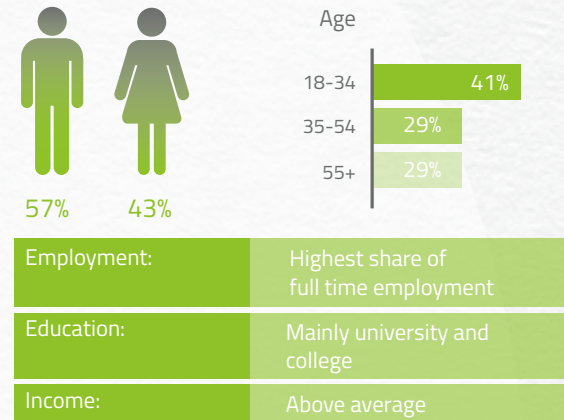
20% CHINA MARKET

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.

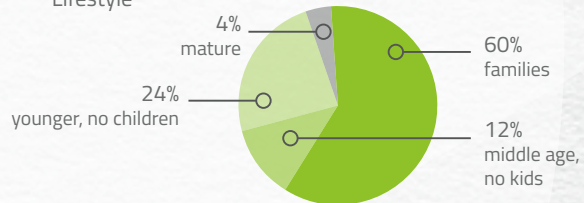
SOCIAL VALUES

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

SPECTACULAR
NORTHWEST 
TERRITORIES

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Fax: (867) 873-4059 Email: info@spectacularnwt.com

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