



ANGELA GZOWSKI / NWTT

NORTHWEST TERRITORIES TOURISM

# TOWARDS RESILIENCE

2021/22 MARKETING PLAN

SPECTACULAR  
NORTHWEST  
TERRITORIES



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WAYNE LUNCH / NWT

# EXECUTIVE SUMMARY

The development of this year's marketing plan comes at a time when travel restrictions issued by the Office of the Chief Public Health Officer have effectively closed the Northwest Territories to leisure travellers. Canada's borders remain closed to international visitors and there is uncertainty about when and where restrictions on travel or gatherings will be lifted in the Northwest Territories. We are not alone in this challenge as the world is grappling with the impacts of COVID-19. The tourism industry has been hit hard, hit fast and it is hurting.

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

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

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

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





BEN WELAND / NWTT

# ABOUT US

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

NWT Tourism was established, with core funding, in 1996 by the GNWT. The GNWT continues to contract NWT Tourism to market the Territory on its behalf. Our work is made possible through core funding agreements established with the Government of the Northwest Territories (GNWT). We lever these resources through other publicly funded partnerships, which include the Canadian Northern Economic Development Agency (CanNor), Destination Canada, and the Indigenous Tourism Association of Canada, and working together with private sector partners and northern communities, we share the incredible stories the people of the Northwest Territories have to tell.

NWT Tourism serves approximately 200 member businesses connected to the tourism industry. The organization is governed by a Board of Directors that includes elected representation from the tourism industry that reflects the varied sectors and regions, and appointed directors that represent Indigenous governments from across the Northwest Territories. NWT Tourism’s main office is in Yellowknife, and we have an experienced team with expertise in Travel Trade, Media, Meetings, Conferences and Events. Our team is supported by a professional northern Agency of Record and a northern social media contractor as well as vital contractors in key target markets communicating to consumers in multiple languages, including German, Korean, Chinese, Japanese, French and English.

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

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

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

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# OUR SPECTACULAR BRAND

The *spectacular* brand encourages visitors to immerse themselves in a world of multi-sensory experiences that are surprising and rejuvenating, and enjoy the wide-open spaces, open roads and spectacular landscapes that evoke a sense of calm. Our people are friendly, hospitable and generous and natural storytellers. Like the land they live in, Northerners can be quirky, honest, and full of surprises.

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

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

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## 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.*

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TERRITORIES



# FUNDING AND PARTNERSHIPS

Tourism supports and is supported by northerners and touches all other sectors of the NWT. The NWT relies on tourism, which plays a vital role in the social, cultural, and economic strength of the Territory - tourism is a driver for good. The tourism industry's success depends on the teamwork of many people, communities, regions, and partner organizations. NWT Tourism has close relationships and funding agreements with governments and other organizations that share NWT Tourism's interest in a vibrant tourism economy.

## GOVERNMENT OF THE NORTHWEST TERRITORIES

NWT Tourism's core funding agreement with the Government of the Northwest Territories provides the bulk of NWTT's funding. NWTT leverages this funding to tap into additional funding envelopes to undertake research, pursue training, develop marketing innovations, and penetrate new markets. Together, NWT Tourism, national, territorial, and community-based organizations in both the public and private sectors work in partnership to grow tourism, and in so doing, the NWT economy.

The core marketing activities of NWT Tourism continue to be the most significant component of NWTT's work. Core marketing activities build awareness of the NWT in key target markets to engage potential visitors, connect them to NWT tourism businesses, and assist their travel planning.



COLIN FIELD / NWT

## GOVERNMENT OF THE NORTHWEST TERRITORIES (GNWT)

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

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

To ensure success in other markets, by language, geographic location, in various sectors and through multiple channels, NWT Tourism also engages General Sales Agents (GSA's), marketing agencies, contractors, and industry partners to enable us to connect with primary audiences regardless of the

geographic locations, languages and nuances of each market. As partners, we work together to carry out the core program, reaching both domestic and international audiences.

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

## NWT CONFERENCE BUREAU

Part of NWT Tourism's partnership with the Government of the NWT is funding to operate the NWT Conference Bureau (NWTCB). The Bureau works to attract meetings and conferences to the NWT. The primary activities aim to solicit, prepare, and submit bids to host conferences and events in

the NWT. This objective is primarily achieved through follow up on sales leads generated through marketing efforts and attendance at industry trade show events.

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

## **CANADIAN NORTHERN ECONOMIC DEVELOPMENT AGENCY (CANNOR)**

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

This funding has enabled NWT Tourism to explore and open new geographic markets without reducing efforts in existing and proven markets. NWT Tourism continues to partner with CanNor to undertake market research and to enhance core destination marketing efforts. CanNor works with NWTT, GNWT and other tourism partners, offering support to the northern economy by supporting the development and promotion of the resilient tourism industry of the Northwest Territories.

## **DESTINATION CANADA (DC)**

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

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

## **INDIGENOUS TOURISM ASSOCIATION OF CANADA (ITAC)**

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

## **INDUSTRY PARTNERS**

NWT Tourism offers a wide variety of collaborative marketing opportunities tailored for local tourism operators. These cooperative opportunities allow members to tap into NWT Tourism's core marketing activities and include discounted rates to participate in consumer travel shows and marketing events and digital and social media advertising. Although the cooperative program is built with the tourism operator in mind, the program also promotes engagement with ancillary organizations such as Parks Canada, regional and/or community tourism development officers. In past years, cooperative ad sales and partnerships have contributed roughly \$50,000 to NWT Tourism's overall budget.

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



# THE MARKETING ENVIRONMENT

Tourism is more than an industry. It is the connection of people to places and the sharing of the world around us, which creates a positive social, cultural, and economic return centered around the sustainable celebration of the natural environment. It is an industry influenced by local, territorial, national, and international political situations and events and as we look ahead, the COVID-19 pandemic remains the most dominant influence on our industry and our marketing environment.

The uncertainty of the pandemic and related rapid changes in the tourism marketing environment have driven changes in the way Team Canada's national and regional destination marketing partners are working together. Working less as domestic competitors, there is rapid sharing of information, research, learnings, and critical developments in a fast-changing marketing environment. Collectively, key partners such as Destination Canada, Indigenous Tourism Association of Canada, Destination BC, cities including Toronto and Vancouver, and northern counterparts, have increased collaboration to provide a support network and to lend foresight in response planning for COVID-19. Our shared goal is a coordinated Canadian response and recovery for the tourism industry.

NWTT continues to anticipate, monitor, and adaptively respond to the rapidly changing geopolitical and pandemic landscape in this setting. Our marketing approach in the year ahead is flexible and is aimed at ensuring that as the GNWT implements its Emerging Wisely Plan, NWTT will take advantage of the opportunity to share the welcoming communities of our spectacular NWT with the right people, when time is right.

As we look toward the recovery of tourism in the NWT and the marketing environment in which that will occur, the destination must ask - 'What sets us apart?' The re-emergence of tourism will see a busy marketplace where consumers are spoiled with choices. Marketing efforts to engage our target audience will need to showcase distinctive points of difference and a strong value proposition for the consumer. And, equally as important, we will need to know who our target audience is, as this may have been changed by the pandemic.

## TOURISM IN THE NWT

Visitation to the territory halted in March 2020 due to public health orders from the Chief Public Health Officer and the travel restrictions have effectively closed the NWT to tourism as we head into this plan. Marketing funds were redirected to enable additional operator financial supports in the territory and marketing was modified to include promotion of intra-territorial activities while continuing to maintain destination awareness in national and international markets. Intra-territorial marketing efforts have become commonly known as staycation marketing within the territory.

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

Some operators have experienced measured success in advertising and selling to the local market, and those operators

that already focused on local markets fared well. Other operators, who have been able to shift their business focus to activities that have appeal for northerners have maintained some level of business. Weekend lodge experiences, custom fishing trips and paddling operators delivering day camps or paddling courses all performed reasonably well over the summer months. Although we view these trends as positive, the short-term nature of these bookings, consisting mainly of weekend travel, adds to the local travel market's insecurity.

### The Local Tourism Economy

Although the number of operators in the NWT was climbing, the pandemic has constrained local business development. The resilience of tourism businesses is being tested. As visitor numbers return, there will be issues around continued business viability. Social distancing and safety protocols that are in place have changed operational cost models, with lower volumes of visitors being hosted and new increased safety protocols and equipment required.

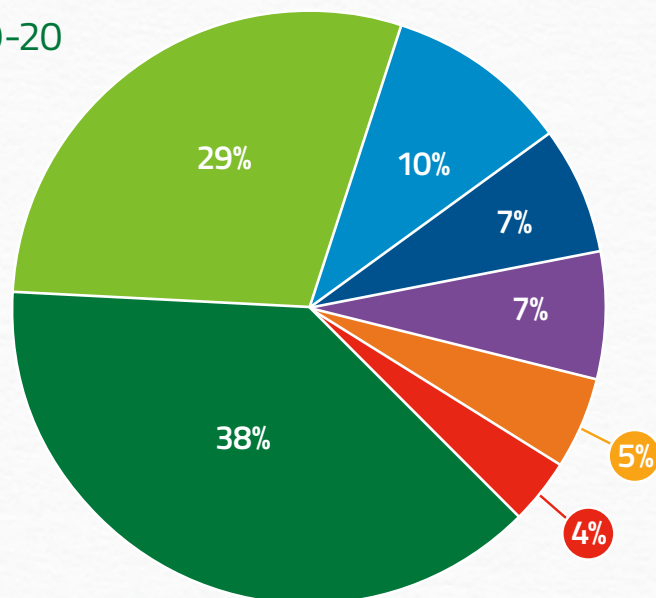
The Visitor spending by product category shown here for 2019-20 may shift post pandemic. There will be a need to monitor and respond to these changes and to market product categories with a unique focus on recovery for each sector.

Committed long-term northern businesses will need to attract the right high-value traveller as costs increase, and they will

### Visitor Spend Percentages 2019-20

#### BY PRODUCT CATEGORY

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





be expected to provide a safe and high-quality experience for visitors. This quality message will resonate with visitors and will build a reputation for legendary experiences. Natural wonders combined with wildlife, wide-open spaces, Aurora, Culture, Indigenous experiences and northern culinary experiences may be some of the areas that connect with trends for travel post-COVID.

## CONNECTING WITH CANADIANS

With the decrease of international travel and no clear indication of when travel restrictions may ease, Canadian residents remain the Northwest Territories' (NWT) primary tourism market. With this in mind, it is essential that the path forward remains flexible and continues to evolve in response to the global situation and to federal and territorial border restrictions.

At the time of writing, travel restrictions were in place for travel into the NWT; however marketing efforts remain effective and continue to work toward maintaining a presence in southern provinces. The territorial border restrictions will likely ease before international borders, and therefore, the domestic market remains a priority. When the travel restrictions ease, many expect the Visiting Friends and Relatives (VFR) market will be the first to rebound within Canada. Canadians will be keen to travel domestically and will have a strong desire to be reunited with friends and family post-pandemic. We anticipate seeing increased road traffic across Canada and in the territory once the restrictions ease, as many Canadians will feel more comfortable taking a road trip instead of flying. Canadian tourists will no doubt see road travel as a safer option to visit other parts of the country, and as a result, we expect to see more RV rentals and campsite bookings during summer.

The NWT is an undiscovered destination in Canada, and NWTT sees this as an opportunity to boost destination awareness in southern audiences who desire wide-open space to explore. Destination Canada's Global Tourism Watch research has shown that Canadians are more likely to participate in outdoor and nature-based activities during trips with fewer crowds. That spectacular environment and setting are precisely what the NWT can offer visitors.

## THE GLOBAL TOURISM ENVIRONMENT

It is no secret that the COVID-19 pandemic has had a significant lasting impact on the global travel landscape. After 2019 set the record for the best year for Canadian tourism with over 22.1 million international travellers, the pandemic in

2020 created unprecedented devastation for the tourism and hospitality industry. Across the world, destinations are focused on managing a health crisis while also trying to keep residents healthy and economies alive. With strict international travel bans and quarantine rules put in place, international travel halted almost entirely.

The effect this has had on tourism operators is momentous. According to TIAC research, most businesses do not anticipate getting back to 2019 sales volume levels until 2023-2024. Destination Canada's research suggests that the overall tourism spending is projected to fall over 361 million dollars across the three northern territories. In "COVID-19 and Transforming Tourism," the UNWTO (United Nations World Tourism Organization) forecasts international tourist numbers will decline by between 58% and 78% from 2019 to 2020. These declines will translate into a drop in visitor spending from \$1.5 trillion in 2019 to between \$310 and \$570 billion in 2020. Key market segments, including group travel, business/bleisure, VFR and day/overnight, have been severely impacted.

Looking to the future and regrowth of tourism globally, NWTT recognizes the importance of international partners and relationships built over many years and understands the vital role they will play in rebuilding tourism. NWTT will continue to focus on critical global geographic markets, including Germany, Australia, Japan, South Korea, China, and Mexico. Market investments, activities, and support for these markets are determined based on their classification as primary, secondary, or emerging, and the status of each country will depend on their pandemic situation.

All new content that NWTT produces now for the Canadian audience is being planned and implemented with the NWT's international markets in mind to ensure the content is pivotable to these audiences when the time is right. Plans must be flexible and adaptable as situations continue to change, and the focus of our marketing efforts will be on those travellers who will rebound the quickest. In Appendix A, you will find an overview of strategies within markets to keep the NWT dream alive so that we can welcome visitors again, when the time is right.

Nurturing and supporting the relationships with our key travel trade partners in critical global destinations will ensure the rebuild of tourism in the NWT is not slowed down in recovery. NWT Tourism will continue to offer support for whatever these businesses need through online training, virtual FAM tours, packaging support, or just discussing new ideas. GSAs will remain in key markets, keeping NWTT connected to their



ADAM PISANI / NWT

respective market demands and our GSAs will notify NWT of best practices for moving forward. While activities, scale and budget may be affected, NWT sees opportunities for expanded partnerships in these markets and looks forward to developing them in these ever-changing times.

NWT Tourism will, with support from funding partners, continue to monitor resident perceptions of tourism in the territory to ensure our international marketing efforts accurately reflect the readiness of communities to welcome tourists. We will consider this when planning the development of core content and integrated marketing campaigns.

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

There is much uncertainty, but one thing that is certain is that technology will continue to play a crucial role in tourism development and marketing. There is a need to build resilience with technology as we enter the next normal to keep our destination and its spectacular stories connected to and engaging the rest of Canada. There is an increasing need to connect emotionally with our target audience(s). In a noisy market, the ability to offer people the sensory experience needed to stimulate the desire to visit relies on sound technological performance.

## **BUILDING RESILIENCE THROUGH TECHNOLOGY**

Public health orders issued that restrict travel have had a significant impact on the tourism industry worldwide. Destination Marketing Organizations (DMO's) have had to diversify their marketing efforts to include new technologies that bring the destination to the visitor instead of the visitor to the destination.

Virtual Tours, Video Conferencing, and Augmented Reality went from revolutionary to relevant in the short time since the onset of COVID-19.

Technology has and will continue to transform the experience economy. Visitors' technological expectations are at an all-time high, with destinations and operators working hard to meet and exceed those expectations. A web presence is now the minimum, with video, engaging photos and virtual tours becoming the expectation. If destinations and tourism suppliers do not deliver, the risk is that the customer will be lost to other destinations, which are offering timely and reliable information. In conjunction with this high level of technological demand, there is an ever-growing ecosystem of digital touchpoints that creates new opportunities for DMOs to connect with travellers at many stages throughout the visitor journey. NWT and its members must stay competitive and meet visitors' expectations in this ever-changing digital landscape by offering virtual experiences that keep potential



visitors connected to the destination at every opportunity. These virtual experiences must endeavor to provide the emotional and sensory connection to our destination by augmenting reality, showcasing our destination, and building brand ambassadorship through user-generated content (UGC).

## INDUSTRY TRENDS AND CONSIDERATIONS FOR MARKETING ACTIVITIES

### Virtual Experiences

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

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

In a post-pandemic landscape where travellers will be cautious of future bookings and more calculated in which destinations they select, the closer the potential traveller can be brought

to the real experience, the more likely it is that they will be able to make an informed purchase decision. For that reason, there is an increased interest in 360 virtual reality content along with augmented reality. DMO's can deliver 360 video or Virtual Reality via apps, web videos and social channels. AR is different because it can be an effective way to make print media and advertising content a more engaging and memorable experience for the potential client. AR can involve triggers built into print content that builds a bridge from static pages to the users' device.

### User Generated Content (UGC)

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

### Video Conferencing

Whether it be the normal business function of the DMO or a client wanting a bit more information from an operator, video conferencing is a trend that is prevalent in the new tourism



landscape. Face-to-face meetings will remain an important component of doing business, and when face to face is not possible, telepresence will fill the void.

## Indigenous and Cultural Tourism

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

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

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

## Culinary Tourism

In recent years, culinary tourism (or gastronomy tourism) has emerged as a significant global marketing trend. Culinary tourism is one segment of the tourism industry that touches almost every visitor to every region. The Culinary Tourism Alliance states culinary tourism can be defined as; "the pursuit of unique and memorable eating and drinking experiences that connect what is being grown and produced in an area to what is being prepared and enjoyed by locals." By combining travel with these edible experiences, culinary tourism offers locals and tourists alike an authentic taste of place. It includes



SARAH PRUYS / NWT

any tourism experience in which a person learns about, appreciates, consumes or indulges in food and drink that reflect the local cuisine, heritage or culture of a place."

While the Northwest Territories currently has no dedicated strategy solely focused on developing culinary tourism, this is an industry trend that NWT Tourism sees great potential in further establishing and, working with partners, including Territorial and Indigenous Governments and NWT operators and private sector businesses, to advance.

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



COREY MYERS / NWT

## Luxury vs Legendary

Luxury Travel was becoming one of the fastest-growing travel segments before the pandemic, outpacing most other tourism sectors. This market enables an increased spend per visitor, contributing to a higher yield per visitor. In the past, the luxury travel market has remained resilient, even in challenging economic times. It is expected luxury experiences will be highly sought after as people begin to travel after the COVID pandemic again. These are affluent travellers who are less price-sensitive than other market groups and do not mind spending more to have a truly unique experience. According to Bain & Company's 2019 Luxury Worldwide Market Study, Mainland China has been a growth driver for the luxury industry in the recent past, with the market growing by 26% in 2019. The report also states that while millennials accounted for 35% of the luxury market in 2019, by 2025 this will rise to 45%. It is members of Generation Z, however, who are poised to reshape the industry. By 2035, Gen Zers could comprise up to 40% of luxury buyers.

Over the next decade, with the expansion of the middle class in many developed and developing countries, growth in luxury travel is projected to continue to outpace overall

travel growth. High-level luxury products are not the norm in the NWT. The NWT's tourism product offering can be positioned as a 'Legendary' rather than a 'Luxury' experience. By leading with our best products, the NWT can facilitate the transition from 'Luxury' to 'Legendary.' Marketing can encourage potential visitors to interact with businesses that provide transformational experiences and authentic human connection. Both Legendary and Luxury tourism requires solid, reliable infrastructure. A robust exchange of information between the GNWT, partners and the tourism industry would allow NWT to share insights on market demands, trends and gaps in the tourism ecosystem that would build resilience and future success. There is a real opportunity to target luxury travellers to experience the legendary tourism offerings of the NWT.

## Wellness Tourism

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



VINCENT RET / NWT

that it has gained significant momentum in the last few years. Wellness travel can encompass several different components:

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

Wellness-minded tourism presents an opportunity for the NWT to attract travellers who, according to research, are higher-income earners who spend more on average than non-wellness travellers, are in a 50+ demographic, and have the time to participate fully. It is also important to state the difference between wellness tourism and medical tourism. Medical tourism involves people who travel to a different place to receive treatments for a disease or condition that is offered more affordably or at a higher quality than is available to them at home. Wellness travel is about people taking trips to improve their well-being and includes spa experiences, yoga, sports, meditation, and wellness retreats. Many of these

activities are already available in the NWT. However, there is a definite opening to expand these offerings and link them to other travel segments, such as cultural experiences that offer travellers a chance to challenge their beliefs and expand their thinking.

### Inclusive Travel

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



BEN WEILAND / NWT

## Accessible Tourism

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

## Online Travel Agencies (OTAs)

OTAs refers to travel agencies whose primary presence is on digital channels, such as websites or apps, where consumers can research and book travel independently without assistance from a traditional agent. Research shows that OTAs are often the first stop for consumers to purchase travel packages and search for destination options and ideas. They are an indispensable part of the travel trade channel, with some of the enormous global OTAs controlling over 95% of the online market, including Expedia, Booking.com,

TripAdvisor, and Trip.com. OTAs offer products for many different destinations but focus mainly on hotels, flights, and package options, including car rentals. In larger centers, experiences and activities can also be booked. They rely heavily on technology and product innovation, which, when combined with innovative marketing and analytics, help effectively target, attract, and retain customers. These sites offer value to consumers at all stages of the buying process, including problem/need recognition, information search, evaluation of alternative options, price comparisons and post-purchase behaviour. NWT Tourism sees OTAs as an area to help our suppliers and destination overall build capacity. Getting small and medium enterprises (SME's) onto OTA platforms, along with accommodation options and flight information, will help convert even more consumers into booking a trip to the NWT. Through partnerships with Destination Canada, NWT Tourism has plans to further develop our online presence on Expedia, the flagship brand of Expedia Group. Expedia Group includes 200 travel booking websites serving 75 countries in 35 languages and hosts over 600 million monthly website visits. With this partnership, NWT Tourism gains the ability to have access to measurements of impacts and returns on investments into the platform, which ensures NWT is making informed marketing decisions.

## Bleisure

Travellers who combine leisure activities while travelling for business are known as Bleisure travellers. The phrase, which was coined in 2009, is quickly becoming a travel trend hotel operators and DMO's should not ignore. The Bleisure market is expected to grow in significance post-pandemic as it is predicted that business travellers will be among the first travellers to re-enter the marketplace. Bleisure travel was initially driven by millennials entering the workforce. With more focus on work/life balance, millennials are highly likely to want to experience something outside the hotel or conference space. Older demographics are now embracing this trend and looking to balance business trips with tourism experiences, particularly wellness and culinary. Bleisure travellers are looking to experience destinations and, if given the opportunity, may extend trips to include tourism offerings so long as the destination is viewed as exciting, unique or is considered to have excellent sightseeing offerings. With its unique products and vast, beautiful landscape, the NWT is in a perfect position to take advantage of this trend with partnerships between local operators and hotel groups. Platforms such as Expedia, Trip Advisor and other OTAs can also enable more engagement from this sector.





VALERIE POND / NWT

## Sports Tourism

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

# STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

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

## STRENGTHS

### The NWT Tourism Industry

The NWT tourism industry has grit. The number of operators, packages and tourism products has grown over the years. As the industry faces an economic downturn, several long-established tourism operators can weather the storm. The NWT tourism sector offers a unique northern experience at a price point below competing circumpolar options.

### Natural Assets

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

### Frontier Spirit

In addition to having substantial natural assets, the NWT is a unique destination. Scarcely populated and remote, it is perceived as an authentic and quirky destination still full of friendly pioneer spirit. It continues to be sought after as a once-in-a-lifetime, "bucket list" destination where people can escape into the wilderness and connect with the 'true North' culture and landscape.

### Strong Industry Partnerships

The growth of the tourism industry relies on strong co-operation with like-minded partners. NWT Tourism enjoys a strong and durable relationship founded on trust and respect with the Government of the Northwest Territories, which provides core funding. It also works in close partnership

with other organizations pursuing tourism, including the City of Yellowknife, the Indigenous Tourism Association of Canada, Parks Canada, CanNor, Destination Canada, and the cooperative work with the tourism industry itself. Further to all these networks, NWTT contracts and employs partners and agencies to assist with marketing and destination awareness in all primary markets.

### NWT Tourism is a Well-run Organization

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

### Digital Innovation

NWT Tourism has embraced innovative digital marketing, keeping pace with how travellers research, plan and book travel. It has taken bold moves to be in the right digital platforms. It has increased overall destination awareness through programmatic digital advertising. The hashtag #spectacularnwt is used widely by residents and travellers alike, and user-generated content continues to populate NWTT social media channels. The Spectacularnwt website is diverse and robust, and while always offering opportunities for improvement, it is comparable on an international DMO stage. The Content strategy has enabled some fantastic success in Search Engine Optimization (SEO) and Search Engine Marketing (SEM) – a strength we will continue to build on.





KRISTIAN BINDER / NWT

## WEAKNESSES

### Limited Digital Presence of NWT Suppliers

Many of our Small Medium Enterprise's (SME's) are owner/operated businesses whose strength lies in delivering legendary tourism experiences. Rather than spending their time on their digital presence, time is spent working in their business. In a digital world these legendary experiences need to be found to be enjoyed. There is a real opportunity to have a much stronger digital presence.

### Accessibility of NWT Tourism Experiences

Although air and road access has continued to improve over time, the cost of travel to the NWT continues to be high, especially relative to other competing destinations. This cost barrier is particularly the case with a journey beyond Yellowknife into more remote areas of the Northwest Territories. The destination also battles with this perception; even in instances where the prices are not cost-prohibitive, domestic consumers' perception is that the price is high.

### Lack of Tourism Infrastructure, Products and Services

The NWT has limited products, services and activities available to visitors, particularly outside of Yellowknife, and only a small

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

### Destination Awareness

Most Canadians are not 'aware' of the NWT (EnviroNics Data in 2020). Many Canadians have no idea of the NWT's geographic location; its landscapes, lakes, rivers, and mountains are widely unknown. Marketing must work to break the stigma around the cold and beliefs about longer travel times. For example, Vancouver residents would travel en masse if they knew the Northwest Territories was a short flight away, and offered a new and unique experience. The direct flight from Vancouver to Yellowknife will be vital post-COVID-19, and if connected, this market will offer high opportunities for visitation.

## OPPORTUNITIES

### Promoting Current, New and Emerging Products in New Ways

There is an opportunity to promote the NWT's existing and new products in ways that resonate differently with different potential markets. While the NWT currently markets the Aurora and the midnight sun, the opportunity exists, for example, to refocus on northern skies and reach new audiences. The North's mining history, including diamond mining, could be used as a marketing lure. The pristine natural abundance of the Northwest Territories makes it a strong match for a growing segment of eco-tourism enthusiasts and wellness travellers. By staying abreast of the evolution of tourism trends, there is the opportunity to reposition the NWT's unique assets in ways that align with trends.

### Infrastructure: New Roads, Thaidene Nënë National Park Reserve

While the NWT needs tourism infrastructure development, some projects offer increased visitor access and new tourism opportunities for communities. The new Tłıchǝ All-Season Road, Thaidene Nënë National Park Reserve, and the new, all-season road planned to connect the Sahtu region with the Arctic Coast, are good examples of where future tourism opportunities lie. Recreational Vehicle (RV) infrastructure is another opportunity. Destination RV parking areas and welcoming tourism resources for road travel will be vital post-COVID-19 including fuel, parks, supplies and wayfinding strategies and infrastructure.

### Highlight Regional Strengths

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

### Maximize Online Experience

An increasing proportion of people around the world are connected via mobile devices and laptops at home. With the pandemic, people spent more time indoors and have become much more 'connected.' Online is where visitors do their

research, plan, and purchase their travel. NWT Tourism has an opportunity to increase its presence online and connect with target markets digitally through social media, websites, and apps. The digitization of the world also provides an opportunity for NWT Tourism to mine user data to better target its messages and hone its reach with those most interested in our destination.

### The New Normal

The desire for travel, change in consumer behaviour, the opportunity for new data around consumers, demographics and target markets: the new normal will be full of possibilities. Some of these opportunities will provide challenges and operators may need to pivot, adjust pricing and product offerings. Marketing will see the need for new and different data in the recovery. New data post-COVID to understand target markets will enable a strategic approach to provide what consumers need and want.

### Indigenous Experiences

There is a cultural movement worldwide. People across the globe are becoming more aware of cultural struggles and injustices. In today's ever-changing world, people are fast realizing the importance of learning, understanding, and appreciating diverse cultures. The global cultural movement has spotlighted Indigenous culture in Canada, and there is a desire for people to engage with authentic cultural experiences when travelling (See Appendix B for audience insights). There is an opportunity to develop and improve the promotion of genuine Indigenous experiences.

### Niche Markets of Essential Travellers

The need for new consumer research is high. Understanding demographics and target audience change post-COVID-19 impact will be an essential part of the marketing program. Research will be conducted periodically to re-establish the right target market and the best audience opportunities. Evidence may show new niche markets that will offer different tourism opportunities. For example, one learning from border restrictions is that essential workers, locum doctors, nurses, and others were the only travellers entering the territory. This group's resiliency as travellers encourages more contact with the niche travellers we know will travel during crisis times.

## The NWTT Co-op Program

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

## MCIT Opportunities

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

## Domestic Travel Trade

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

## THREATS

### Geopolitical Instability

At any given time, there are changes in the geopolitical landscape that can affect the number of visitors to the NWT. The pandemic was an extreme case and the geopolitical climate at the time of writing is uncertain. Relationships between Canada, the United States and China have been stretched and as we recover the industry, each market, both nationally and internationally, comes with its differences. These situations are closely monitored by NWTT's partners in key primary markets.



DESTINATION CANADA / NWTT

## Negative Social Media

Social media invites engagement, both productive and non-productive, both positive and negative. Because social media travels quickly and globally, negative social media can threaten the marketing of any destination if not dealt with effectively and promptly. This is a critical threat during crisis times, and social listening can monitor this threat on an ongoing basis.

## Mother Nature

The very thing that is our greatest asset — our natural environment — is also a potential threat to tourism. Changes to our natural assets due to climate change, weather causing travel issues, and even the enduring perception of the NWT as having a climate unfavorable to travel could affect the tourism industry's recovery if not managed.

## The Tourism Ecosystem

Pre COVID-19, The NWT had reliable air transportation routes, notably through Vancouver, Calgary and Edmonton, making the NWT easily accessible to travellers. This extended to international markets as routes were refined to offer good connections to our destination. Post pandemic, this ecosystem is at risk. Reconnecting markets may take time, and the NWT's ability to access visitors could be significantly hindered for an unforeseen period. Travel to the NWT, and especially to regions beyond Yellowknife, is costly. These costs are subject to change with changes in the Canadian exchange rate with other currencies, and with fewer travellers and social distancing precautions, the cost of travel has risen.

## Domestic Competition

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



FRAN HURCOMB / NWT

## Tourism Perceptions

Local politics and resident perceptions of travellers pose a threat to tourism. With communities at risk there has been an often negative reaction on social media from NWT Residents to summer visitors from other communities. While the value of tourism remains an important message, the threat posed by unwelcoming communities in response to disrespectful tourism has the potential for real damage. Visitors must be made aware of the right time and place, and respect community wishes to encourage welcoming communities and the flourishing of our northern hosts.

## Privacy Laws

Privacy laws have been rapidly developing and changing in a fast-paced digital world. While increased privacy is a good thing, the threat to data and analytics is high. NWTT must keep in touch with developments in privacy laws and ensure our digital marketing activities adhere to the latest rules while striving to compile a full audience picture through data gathering and analytics.







# TARGETING OUR MARKETS

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

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

NWT Tourism uses website analytics to monitor engaged audiences online and uses postal code data and survey data to focus marketing activities on the right audiences. Until robust research on the target audience is available to reassess primary markets, NWTT will respond to our analytical data and shift our focus accordingly. Our primary audience has been a slightly older demographic of fifty plus. An audience that is broader in age is a logical choice as NWT aims to dial into the functional (business travellers) and emotional marketing of target audiences in target markets. We are broadly targeting Canadians – aged 35 – 65 (not just English-speakers). COVID-19 has made an impact that may have lasting effects on our target audience. Research will need to be conducted regularly post-pandemic to ascertain the most viable audience based on intent to travel and market access.

## 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 (Appendix A – Target Markets). We also consider the strength of a market economy, current geopolitical status, air capacity, and other factors that may affect travel ease and interest.

## COVID-19 IMPACT

Due to COVID-19, and related travel restrictions, the NWT was effectively closed to visitors in March 2020, and many of our communities are not ready to welcome non-residents. We are faced with a rapidly changing and challenging situation that requires monitoring the political, environmental, social, and technological environments and responding accordingly. The summer of 2020 saw local NWT residents out and active with local staycations. While this was positive, the staycation market simply could not replace tourism visitation and revenues coming from outside the territory. Ultimately, tourism was devastated, and the tourism industry is focused on visitors returning when the time is right. As the territory looks toward the next phase in tourism recovery marketing, it must focus on the first available economic opportunities. We know family and friends will come to visit when this is possible, we know that business will eventually resume in the new normal, so we are focusing on staying connected. The following recovery framework guided us through the response to COVID-19 and recovery actions. We may move back and forward through this model due to health, safety, social, economic, and political factors.

## THE PEOPLE APPROACH – PSYCHOGRAPHICS AND MARKET SEGMENTS

Understanding the audience is imperative to marketing, and while COVID-19 impacts visitors to the NWT, understanding the potential visitor is now more critical than ever. Since 2006/07, Destination Canada (DC) has used a proprietary psychographic segmentation system based on travel values, called Explorer Quotient (EQ), for its Brand Canada marketing efforts and as a licensed research product for destination marketing organizations at the provincial and territorial level. EQ 2.0, launched in 2018, offers access to more data, allowing for a more actionable travel values-based segmentation for today's digital marketers. EQ segmentation data covers social values, demographics, media preferences, and more.

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



# NWTT RESPONSE & RECOVERY PLAN TO COVID-19

## TOURISM MARKETING

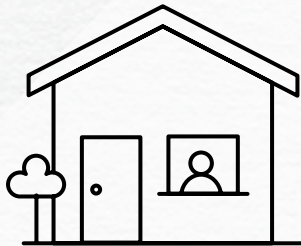
### RESPONSE

#### SITUATION

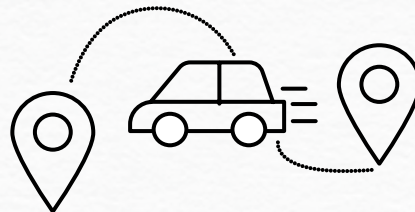
Travel Restrictions and Isolation Periods effectively close the NWT to Tourism. COVID-19 cases and controls are primary indicators, restrictions on gatherings in place, tourism businesses restricted, little to no active cases of COVID-19 in the NWT. Tourism industry focused on survival.

#### OBJECTIVES

Keep the tourism activities and attractions normally available in the NWT in the minds of consumers for when it is safe to travel again. Beginning to market staycation activities to NWT Residents



#### NO TRAVEL



#### HYPER LOCAL TO LOCAL



#### REGIONAL

#### EASING OF PUBLIC HEALTH MEASURES/RESTRICTIONS

##### "DREAM OF FUTURE TRAVEL"

- Organic and paid Search to keep the NWT top-of-mind as a destination when travel resumes
- Display ads pointing to premium content on the website.
- Adjust all Calls to Action to be sensitive to the situation.
- Remove travel packages from the homepage of the website.
  - Continual development of materials such as virtual tours from existing photos and video content

##### STAYCATIONS RESTRICTED INTER-TERRITORIAL TRAVEL

- Dual focus of marketing efforts
- Continue focusing on long term visitation from primary markets
  - Local campaign for travel opportunities and "staycations" within select communities in the NWT
  - Targeted campaigns for staycation marketing to support operators who are able to conduct business activities within public health guidelines.
    - Asset gathering of video and photos in key regions of the NWT utilizing local photographers whenever possible

##### CAUTIOUS AND PHASED TOURISM MARKETING INTER-TERRITORIAL TRAVEL

- Movement within communities and between communities and regions of the NWT resumes
- Campaign to restore confidence in the NWT in tourism; residents ready to welcome visitors and confident in the tourism industry awareness of prioritizing resident safety
- Staycation Campaign continues with further investment to encourage NWT-wide travel

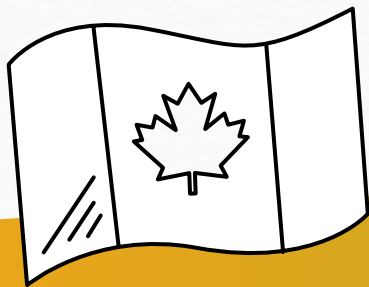
# RECOVERY

## SITUATION

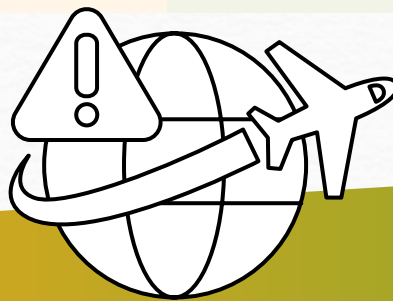
Travel in localized areas (first within NWT and then from other provinces and territories in Canada) begins, territorial parks begin to open, tourism businesses begin to open and group gatherings of some number start.

## OBJECTIVES

Marketing activities will support businesses reopening in a phased approach and encourage people to support local. Keep consumers informed about what activities and services are available. Ensure lost travel demand from the previous periods is replaced with domestic audiences and other key markets.



### INTERPROVINCIAL AND TERRITORIAL



### TENTATIVE INTERNATIONAL



### REGULARIZED INTERNATIONAL

# RESILIENCE

## SITUATION

International Travel resumes, international borders open, airlines are adding flights, hotels are resuming operations, large meetings and events are beginning to be scheduled.

## OBJECTIVES

Resume marketing on all channels in all marketing including international channels. Marketing activities support the tourism industry to grow sustainably to pre-COVID-19 levels.

#### TRAVEL WITHIN CANADA TERRITORIAL BORDER IS OPEN

- Domestic Campaign to primary markets and neighbours in Canada focusing on where travel restrictions have been lifted
- Promote visiting friend and relatives (VFR) in the NWT
  - Promote road trips to targeted markets
  - Promote NWT Parks if they are open
- Media and Travel Trade FAMs resume from within Canada
- MCIT site visits and FAMs resume from within Canada

#### RAMP UP MARKETING TO SUPPORT INDUSTRY REBOUND

- International Travel Resumes
- Language group marketing continues with a push for international visitors who are visiting friends and family currently living in Canada.
- Media, MCIT and Trade FAMs
  - resume from 'green lane' international markets.

#### INTO THE NEW NORMAL

- Travelling Freely in a new normal
- Trade FAMs and trade shows resume for all markets
  - Active Campaigns in all primary markets
  - Develop an assertive co-operative marketing program which offers businesses extensive marketing support
- Large-scale North American consumer campaign



# 2021/22 MARKETING PLAN

The Marketing Plan guides team activities and details the strategies and tactics NWTT will use to achieve its goals and objectives. The plan acts as a resource on which to rely when moving through the calendar of marketing activities. This plan can be shared to show partners the planned actions toward marketing the NWT. In 2019/20, NWTT pivoted on the marketing plan due to COVID-19, but the overall goal and objectives remained top of mind. At the time of writing, travel restrictions are in place effectively closing the NWT to tourism, and we need to plan to be flexible in the face of a rapidly changing marketing environment.

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## GOAL, OBJECTIVES AND MILESTONES

The goal is the ultimate outcome laid out by the Board of Directors and it guides all activity and the setting of objectives and the marketing milestones NWTT strives towards. While the industry is working towards recovery, focus on the 'growth' of the tourism industry will help recover and build resiliency. The goal remains true as people look toward the eventual growth of tourism - resilient and sustainable.

## GOAL

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

## OBJECTIVES

At the core of any great marketing plan is a clear list of strategic marketing objectives. Objectives outline the marketing team's intentions, provide clear direction for team members to follow, and offer partners information to review and support. Our objectives signal when progress is made toward the primary goal. It is how we target our success in pursuing our goal. Once the objectives are met, NWTT can set new objectives. Objectives are linked to Milestones and Key Performance Indicators (KPI's). As there is a significant impact on the GNWT's ability to gather visitor data and other metrics, some objectives will need to be ambiguous depending on the situation and will be monitored closely as the year continues. Objectives outlined below are discussed throughout the strategy and tactics, and although some of these objectives may be lofty, they drive NWTT's efforts. NWT Tourism will aim to achieve the following 12 Objectives.

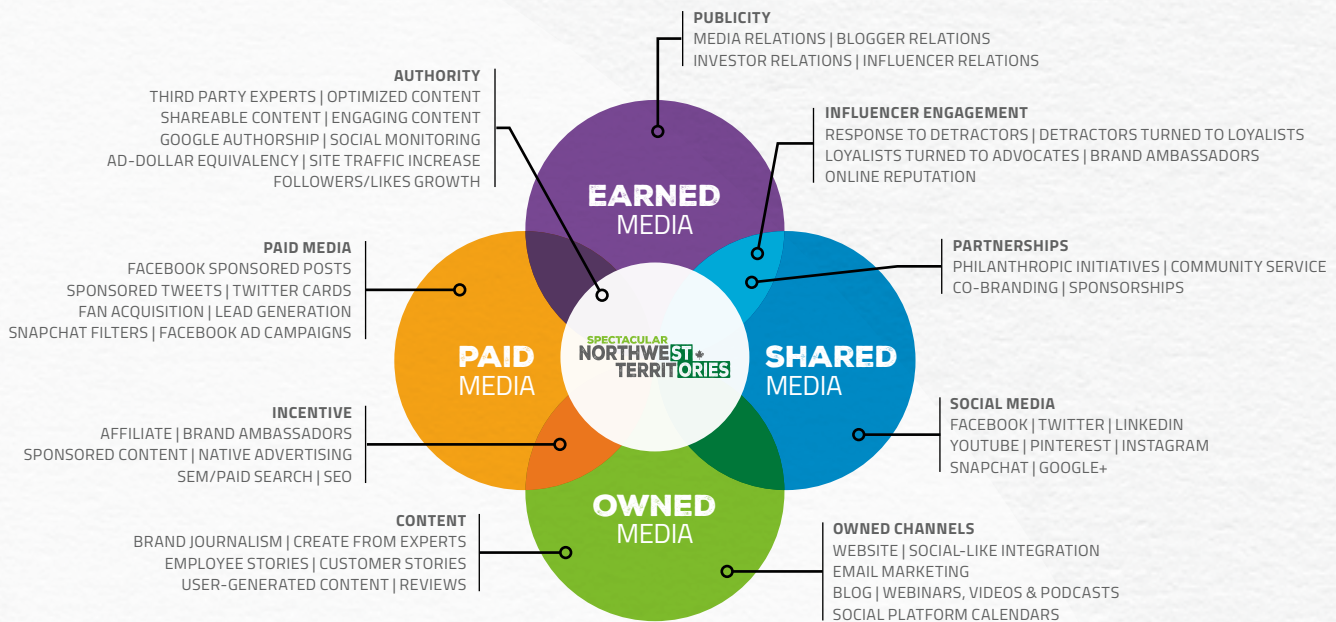
1. Grow tourism visitation and expenditure
2. Expand destination and brand awareness
3. Encourage regional distribution of tourism benefits
4. Expand awareness of Indigenous Experiences
5. Rebuild earned media content
6. Establish regional partnerships in pursuit of the NWT as a Meetings, Conferences, and Incentive Travel (MCIT) destination
7. Improve the effectiveness of owned media content
8. Improve the effectiveness of paid media content
9. Improve social media engagement and increase following
10. Improve video engagement and increase following
11. Build resilience in travel trade networks
12. Connect with the right target markets

## MARKETING MILESTONES

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

- Establish benchmarks for visitation and expenditure in partnership with the GNWT post COVID-19
- Maintain brand awareness as per Environics measures and build a robust annual tracking framework for brand awareness.
- Measure and maintain audience quality and engagement every quarter (bounce rate, time on site and page depth).
- Measure and build owned content engagement (click through rate, time on page, scroll depth).
- Rebuild earned media to \$1M
- Monitor, track results for paid media KPI's (bounce rate, Cost Per Click)
- Average social media engagement of 5% and grow our following to 133,000 across all channels.
- Video engagement 75% completion rate and increase following to seven thousand.
- Establish website landing content for all primary markets





ADAPTED FROM: GINI DIETRICH, SPINSUCKS®

## MARKETING CHANNELS

NWT Tourism approaches our marketing through four key distribution channels: direct to consumer, travel trade, travel media, and the meetings conventions and incentive travel (MCIT) sector.

### Consumer

Arguably the most important channel is direct to consumer. A destination marketing organization aims to attract visitors to the destination and develop local economies due to increased tourism. Engaging people through marketing and developing an interest in the NWT, consumer marketing aims to create a desire to visit the destination. 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 them facts, interesting reads, emotional content or a link to a member listing and the jump-off to member's websites, booking agents, or even a phone call.

The consumer distribution channel remains the largest focus of our marketing efforts. The primary consumer target is potential visitors from throughout Canada and this will be extended to include the United States, when Canadian borders re-open. When the time is right, NWTT will expand digital tools to reach consumers where they research destinations and

make travel plans: online. Now more than ever, the intention is to develop brand recognition and destination awareness.

Starting at home with NWT residents, we must build the brand ambassadorship and pride in sharing the NWT with visitors when the time is right. The territory must build ambassadorship and pride in our spectacular destination. We need to encourage storytellers to share #spectacularnwt with friends, family and work colleagues. Now is the time to connect emotionally and to welcome guests back year after year, encouraging them to build their life's stories in the Northwest Territories. It's a place full of moments to experience and share the unique and spectacular NWT, and we will tell them this directly through consumer marketing.

### Media

One of the most effective ways to increase destination awareness is through owned, earned, and paid media coverage. While NWTT has placed a high priority on 'Travel Media' in the past, NWTT is dynamically approaching media as markets shift and change.

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



COREY MYERS / NWTT

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

Often earned media comes from traditional and online media that specialize in reporting on travel and destinations. NWTT builds relationships with these 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 gain reach and general awareness for a destination.

While travel media plays a crucial role in promoting and selling tourism destinations, COVID-19 had an impact on familiarization (FAM) tours, an essential factor in obtaining travel media coverage. The media coverage by travel writers, bloggers and broadcast journalists enables a greater reach than most other marketing activities. Consumers trust earned media more than paid advertising. It provides a voice of authenticity with readers because it is genuine, and the destination is not controlling the message. Earned media is

where the destination earns the emotional connection that talented writers offer to a reader; however, the destination has no control over what is said about the destination or when it will be published. The importance of paid media has grown while travel restrictions are in place, and NWTT has taken a holistic approach to media that leverages owned and locally earned media, paying placement and promotion.

**Paid media** is when we pay for our content to be promoted to a broader audience that we may not have access to organically. For example, paid media would include any advertising or advertorial as well as any boosted social posts. The benefit of paid media is that the destination controls the message, the target audience, and the duration for which the piece will be promoted. The downside of paid media is that it consistently costs more than earned media and is less trusted by the consumers. Each channel works hand in hand and is very important for maximizing media coverage. By combining all three channels and using social media's connectivity, we can amplify our reach and destination awareness more effectively. This year our objective will be to maintain destination awareness through these three media channels and work toward attaining a media value of \$1M.

## Travel Trade

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

The Travel Trade has played a vital role in marketing the NWT to our key international marketplaces where direct marketing to the consumer is cost-prohibitive, and destination awareness is low. As the tourism industry recovers there will be a need to rebuild and connect with 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, 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)

Different from the other three channels, MCIT isn't a way to connect to consumers; it's a different type of demographic altogether. This channel is comprised of those who broker and organize business and convention travel. NWTT's Conference Bureau manages this channel and works with local businesses in the NWT to gather information to respond to requests for proposals (RFPs) on behalf of the region. Marketing efforts focus on attracting mid to small-sized meetings and conferences and on promoting the NWT to incentive companies looking for innovative ways to reward their top clients and employees. The NWT Conference Bureau customarily attends MCIT shows and events (both virtually

and face to face), hosts site visits for planners, and helps local partners submit bids and proposals to host meetings, conferences, and events in the NWT. The NWT Conference Bureau continues to build resiliency in the MCIT markets by continued investment in online digital advertising coupled with modern visual assets such as virtual tours and virtual experiences.

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

## MARKETING STRATEGIES AND TACTICS

NWT Tourism will use core strategies and associated tactics, through the channels identified, to target primary, secondary, and emerging geographic markets, while addressing psychographics and customer segments that match the NWT's core tourism assets. NWT Tourism aligns with Destination Canada's path to purchase model (Appendix C), demonstrating the customer journey stages to help understand when marketing activity occurs. The path to purchase model can also be seen as a funnel that depicts NWTT's marketing strategies and tactics and their intentions graphically.

## Integrated Marketing

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

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

# THE MARKETING FUNNEL

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

The marketing portion focuses on four areas: Awareness, Engagement, Desire, 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 center 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 members 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.

## Brand: Enhancing and upholding our Spectacular brand to maximize destination awareness

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

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

### Our brand promise

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

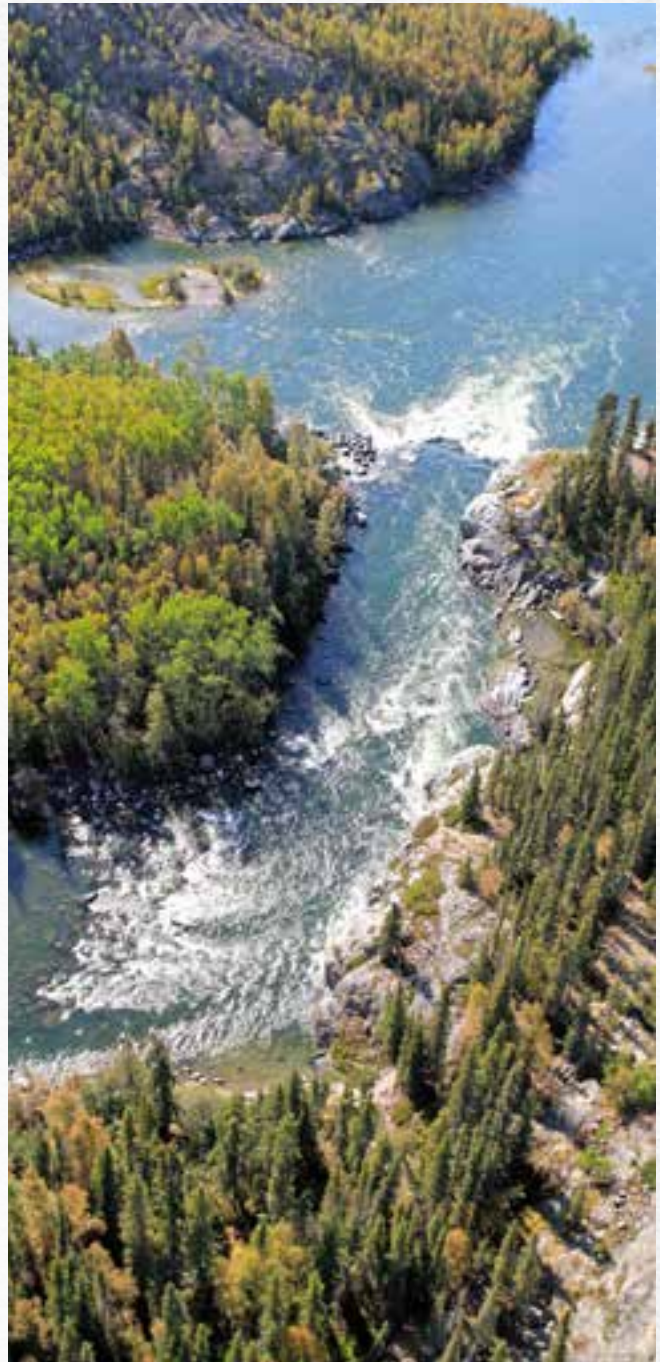
*The Northwest Territories' destination brand is what we want potential visitors to see as their 'mind movie' when they think of the Northwest Territories. Through our marketing, the Spectacular brand provides a compelling reason for customers to select our destination for their travels.*

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

### 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 NWT. NWT Tourism's inventory of content is full of an assortment of high-quality visuals from all five regions.

In the 2020/21 year NWTT have increased the budget in these areas to allow for increased asset acquisition. This will fill much needed gaps in our content library. The challenges of travel restrictions also means that earned media opportunities are limited which will increase the cost of content creation



TAWNA BROWN / NWTT

and acquisition. NWTT is investing more with NWT resident content creators and working hard on developing these long term relationships with the northern photo and video community.

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

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

## Digital: Always on

Consumers are increasingly online. Close to 60% of the world's population is online, and the number is growing. By 2015 the number of devices connected to the internet outnumbered the world's population by a factor of 4:1. And with an estimated number of 38.5 billion devices worldwide, that number is now closer to 5:1. Mobile computing has become the new internet. There are over 33 million mobile subscribers in Canada alone, and smartphones are the number one access route to the internet.

Digital marketing intersects all of NWTT's marketing strategies. The digital space has become increasingly necessary after isolation periods saw a real need for people to stay connected while at home.

NWTT's digital marketing strategy uses various tools and tactics, including search engine optimization (SEO) and search engine marketing (SEM), programmatic media buying, retargeting, and paid ads on social media. Our digital strategy

also includes monitoring trends in all channels, ensuring that NWTT is on top of emerging trends and their place in the digital space. For example, during COVID-19 response marketing, NWTT worked with partners to adjust messaging and remove display advertising away from news sites and other areas that put our destination at risk of being seen alongside negative news. With digital presence monitoring, we shifted programmatic advertising to a strategic list of content providers and specific audiences.

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

In 2021-2022, NWTT will continue to transform marketing online for improved reach and effectiveness. We will consider digital evolutions and digital extensions of existing tools such as the Explorers' Guide, email distribution, and how we tell our stories employing more video storytelling. We will continue to embrace social in everything we do, focusing on those things that make the NWT unique and 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 to collect research and gather data that will help us better target our marketing efforts in real-time, and create content that continues to resonate with target consumers.

## Calls to Action (CTA's)

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



ANGELA GZOWSKI / NWTT

## Social Media Strategy

Social Media has become 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 social media contractors to manage domestic social media channels and international channels. NWTT must keep its online presence consistent and 'on brand' across all our platforms. The main objective for all social media channels is to increase brand awareness, boost engagement and provide a click through to the right content. The primary tactical approaches employed are creating new organic content, repurposing owned content and sharing User Generated Content (UGC). Social media activity increases engagement with NWTT's following by liking, commenting on posts, sharing content, and interacting with users daily

on all social media channels. Leveraging UGC with these users has been an effective way to promote the destination in an authentic way. 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 pictures through NWTT social media channels. Furthermore, closely monitoring social content allows NWT to monitor member and professional photographer content. NWT 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 NWT for our list of required assets.

## Content marketing: telling stories that engage

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

The tourism marketplace is always evolving, and consumers are continually demanding a stream of new content that shares inspirational imagery, 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 increases the engagement on social media channels that will enable click-throughs to our [spectacularnwt.com](http://spectacularnwt.com) website. By continuing to serve up the right content, NWTT can increase audience retention. Developments to the website have included a points-based algorithm that positions similar content on story pages to keep users engaged until they take action. Tools to share user-generated content 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.

Retention and return will happen when spectacular content carries 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 highlighting why great content is a vital asset for maintaining the brand voice. 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

In a 2017 study by Destination Canada, 43% of the US and 40% of the UK visitors said they love experiencing different foods and will try anything once. Another fascinating insight is that 85% of American travellers say online reviews are an important consideration when deciding where to eat while travelling, and this is mirrored in UK visitors (DC, 2017). These are facts NWT will take into consideration when developing culinary content. Content based on trends and industry insights leads to conversions in areas where opportunities lie. A strategic approach, starting with facts-based content development and keeping search engines in mind, is how all our content is developed.

## Search Engine Marketing (SEO)

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

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

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

Search Engine Optimization tactics are continually changing as Google and other search engines change their algorithms for determining which web pages are delivered first in a search. For example, we have recently learned that 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. NWT Tourism, along with our Agency of Record, is staying on top of SEO trends and is adapting our tactics on a regular basis.



## Experiences: Lead with our best products and attractions

NWT Tourism will always lead with our best. Our in-market materials will highlight the best attractions and experiences available to visitors. In line with our strategy, to highlight all regions of the NWT, we will lead with our best trade-ready regional products, and where there is no trade-ready product, we will lead with our best market-ready products. Our marketing is research-based and consumer demand-driven. We optimize marketing efforts based on what consumers want. Demand drives a destination's ability to highlight other less-known attractions and regions. Research into consumer demand online helps identify areas of focus and the products and interests that will offer an opportunity to engage people with our content and destination before telling them about the spectacular experiences available. An example of a demand driver is the Northern Lights. For our Aurora product, we are experiencing increasing competition both from within Canada and internationally. In addition to reaffirming that our Aurora are scientifically proven to be the best, we will ensure our messages reach target audiences digitally and that we are top of website searches for both Aurora and Northern Lights keyword terms. The Nahanni is another example of the undisputed demand for content that provides the opportunity for a gateway to engage users and then serve up other content about paddling experiences available in the NWT.

## Partnership: Working together for maximum impact

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

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

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



AINSLEY MILLER / NWTT

## 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, and guide 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, and new analysis into target demographics and re-establishing market knowledge will be critical. NWTT will continue to work closely with the GNWT to identify research needs and access data as it is gathered.

As part of our digital strategy, NWTT and its partners will study existing pools of data such as data available through Destination Canada, Google Analytics, and other on-line 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 ANNUAL ACTIVITY CALENDAR

ACTIVITY	APR	MAY	JUN	JUL	AUG
NWTT	New Membership Year		Tourism Week		
Content Overview (Website, Digital ads, eNWT, Social)	General Touring		Festivals	E-Newsletter Parks	Fall Aurora
Explorer's Guide				Design	Design Concept Presented
Consumer Shows					
MCIT Shows					Canadian Meetings and Events Expo
Fams/Sites MCIT			Mid-June to end of August High Season		High Season
Media Shows			TMAC		
Travel Trade		RVC (Edmonton)	Focus Mexico	CSE Intake Trade Newsletter	
FAM Tours Media & TT	BLACKOUT		Summer high season		Summer high season
	WINTER SEASON		SUMMER SEASON		SHOULDER

## Legend:

**CSAE**  
Canadian Society of Association Executives

**CSE**  
Canadian Signature Experience

**FAM**  
Familiarization tour

SEP	OCT	NOV	DEC	JAN	FEB	MAR
		AGM & Conference				
	Winter Aurora & Activities	E-Newsletter Aurora		Paddling/Fishing/Touring/Parks	Paddling/Fishing/Touring/Parks E-newsletter Road Trips	Paddling/Fishing/Touring/Parks
Editorial Completed	Draft Proofing	Sign Off/Upload	Consumer Show Bulk Shipping		Visitor Centre Bulk Shipping	
					Toronto OAS	Vancouver OAS Toronto Sportsman Show Calgary OAS Montreal OAS
IMEX	CSAE National Conference			Tête-à-Tête & Destination Direct		
GoMedia						
	Showcase Canada Asia Focus Korea	Travel Exchange - NTA	CITAP - Vancouver	CSE Intake Trade Newsletter	Focus Australia	
Summer high season		BLACKOUT			Winter high season	
SEASON	WINTER SEASON					

**OAS**  
Outdoor Adventure Show

**RVC**  
Rendezvous Canada

# NORTHWEST TERRITORIES TOURISM ANNUAL ACTIVITIES BY CHANNEL

ACTIVITY	CONSUMER	TRAVEL TRADE
GUIDE	Explorers' Guide (English and French)	
TRADE SHOWS	Toronto Sportsman Show, Toronto OAS, Montreal OAS, Calgary OAS, Vancouver OAS  Snow Travel Expo Sydney/Melbourne  Co-op opportunities increased	Focus Mexico Showcase Korea RVC Corroboree
ADVERTISING PRINT	Evolve to new formats, multi-channel	Limited
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 - quarterly	Travel Trade – quarterly in each market Sponsor content in trade e-newsletters

## MEDIA

GoMedia, TMAC

Limited

TMAC, Communications Working Group (DC)

CANTO/Agility PR/Crowdriff

Update media site  
Repurpose content in stories

Influencers' # posts  
Share media stories

1 Qualified media/market  
6 North America

Share media stories

## MCIT

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

Limited

Targeted campaign

CSAE, MPI

1500 (+20)  
CANTO

Update with strong call to  
action, venues and hotels

Lever local businesses and  
organizations

Lever 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

Rendezvous Canada

### RTO

Receptive Tour Operator

### TMAC

Travel Media Association of Canada

### MEE

Meetings and Events Expo





JASON VAN BRUGEN / NWTT

# 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 2020/21 MARKETING BUDGET

### CALL CENTRE

Mail and Delivery	\$30,000.00
Service Supplies	\$1,000.00
Toll Free Telephone	\$7,000.00
Upgrades to System	\$20,000.00

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*Call Centre* **\$58,000.00**

### CONSUMER PROGRAM

Show Fees and Services	\$10,000.00
Consumer Direct Marketing Program	\$26,000.00

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*Consumer Program* **\$36,000.00**

### AGENCY CONTRACTS

Project Management	\$71,000.00
Europe	\$70,000.00
Asia Pacific	\$164,000.00

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*Agency Contracts* **\$305,000.00**

### COMMUNICATIONS

Media Shows and Events	\$6,500.00
Media Program (FAMS)	\$83,000.00
Media and Public Relations (MR/PR)	\$16,000.00
Photography Contracts	\$75,000.00
Media Show Travel (Go Media)	\$6,000.00

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*Communications* **\$186,500.00**



## MARKETING

North America	\$1,200,000.00
International	\$320,000.00

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<b>Total General Advertising</b>	<b>\$1,520,000.00</b>
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North America Recovery Projects	\$150,000.00
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<b>Total Domestic Recovery (New Markets)</b>	<b>\$400,000.00</b>
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Regional Advertising	\$100,000.00
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Special Projects	\$75,000.00
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Brochure Development	\$89,000.00
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Business Meetings	\$2,045.00
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Promotional Materials	\$23,500.00
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Research	\$30,000.00
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B2B Shows, Meetings and Virtual Events	\$34,500.00
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B2B Familiarization	\$16,000.00
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Trade Shows Registration & Fees	\$43,000.00
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Digital Development	\$291,000.00
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<b><i>Marketing</i></b>	<b><i>\$2,959,545.00</i></b>
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## NWT TOURISM CONFERENCE AND AGM

AGM Logistics	\$10,000.00
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Venue Expenses	\$10,000.00
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Speaker Travel (AGM)	\$10,000.00
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Speaker Fees and Expenses	\$20,000.00
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<b><i>Market Ready Training/Conference</i></b>	<b><i>\$50,000.00</i></b>
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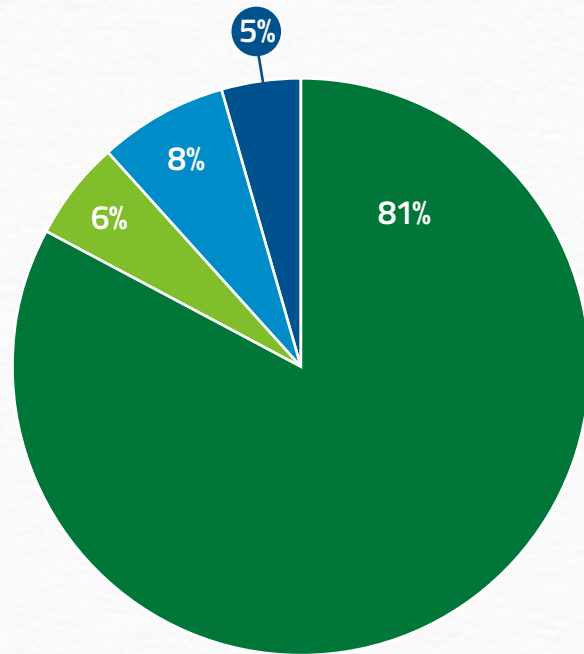
**TOTAL BUDGET**

**\$3,009,545.00**

## BREAKDOWN OF MARKETING BUDGET \$3,009,545.00

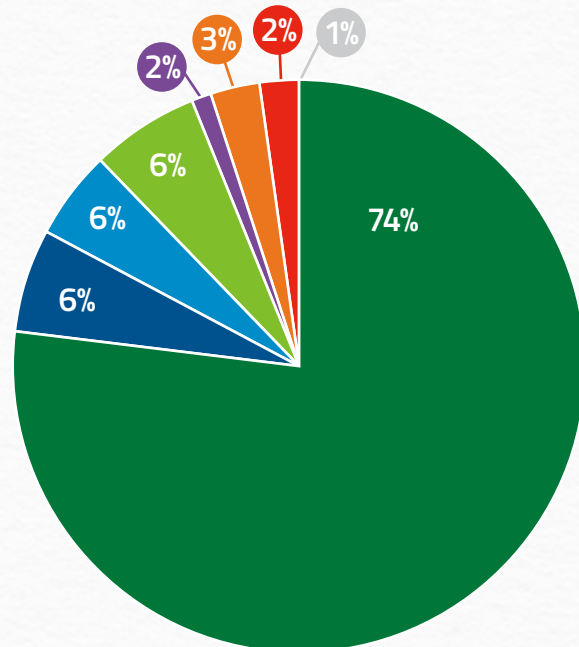
### 2020/21 Marketing Channel Budget Summary

- Consumer
- Media
- Travel Trade
- MC&IT



### 2020/21 Geographic Market Budget Summary

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



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

## CALL CENTRE

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

## DIRECT TO CONSUMER MARKETING

NWTT has participated in consumer trade shows across Canada over many years and supported operators in attending shows to market directly to consumers. Lure pieces such as the Explorers' Guide have been vital to these shows in connecting with consumers. As we enter an age where consumers are spending more time online and less in crowded venue spaces our digital strategy remains strong. While you can never replace the power of out of home (OOH) activations and in-person marketing interactions, the data driven digital approach will keep our destination connected to consumers.

This budget is used for all shipping, freight, and courier costs, show fees and services, supplies to enable participation in these shows, and associated travel costs for NWTT staff to attend and work the shows.

## AGENCY CONTRACTS

To help achieve the objectives of this marketing plan, NWTT contracts the services of an Agency of Record. 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, Australia and Chinese. NWTT also contracts an agency to undertake regular social media activities. This budget reflects those contract costs.

## COMMUNICATIONS

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

## MARKETING

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

## MARKET READY TRAINING

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

## LEGEND

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

# APPENDIX A: GEOGRAPHIC MARKETS

Before the pandemic, NWT Tourism's target markets were well established and 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 be keeping up to date on research and other information about travel constantly, and when the pandemic subsides we will rely on up to date research to ensure that NWT Tourism 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 domestic and international tourism to succeed. Staycations and domestic visitation offer a much smaller visitor spend and lower revenue per guest. In the latest data from Destination Canada the baseline average visitor amounts for spend are;



# NORTHWEST TERRITORIES



**POPULATION:** 45,161

**AUDIENCE SIZE:** 12,780

**AVERAGE HOUSEHOLD INCOME:**  
\$134,057\*

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

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

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

feasible with domestic and international audiences.

**STRATEGY:** A community-based strategy will include local media advertising with Print, Digital, Radio and Social Media. NWT Tourism will utilize Staycation messaging to encourage NWT residents to explore their backyard. Geo-Targeted social media posts have met with success and will continue to be used to build 'spectacular' brand ambassadorship to welcome VFR and returning domestic visitors when the time is right.

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



# CANADA



**POPULATION:** 37.6 Million

**AUDIENCE SIZE IN CANADA:**  
2.17 million

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

**EQ TRAVEL SEGMENTS:**  
Learners aged 35-64

With current geopolitical and health/safety issues around the world, Canadians are limited to travel at home. Like most other Canadian destinations, the NWT traditionally draws most of its visitors from within Canada. Canadian visitors accounted for 60 – 80% of travellers to the NWT in 2019. Domestic marketing efforts of NWT 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, NWT has shifted focus to attract more Canadians to visit the territory through domestic marketing efforts.

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

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

**TRAVEL TRADE SHOWS:** Rendezvous Canada 2021 (Edmonton), CITAP Winter Function

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

**CONSUMER TRADE SHOWS:**

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

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

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



# UNITED STATES



**POPULATION:** 328.2 Million

**AUDIENCE SIZE IN US:**  
4.75 million

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

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

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

Typically, American travellers like to take advantage of long weekends for travel, with 70% of all travel taking place between May and October. 11% of potential American travellers to Canada expressed an interest in visiting Canada's north, and 1 in 3 US visitors expressed an interest in Indigenous Cultural Experiences.

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

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

**TRAVEL TRADE SHOW:** Travel Exchange (NTA)

**MEDIA TRADE SHOW:** US Market (TBD)

**MCIT TRADE SHOWS:** IMEX

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

**TRAVEL TRADE KEY ACCOUNTS:**  
Collette, Road Scholar, Globus,  
The Ensemble Group



# CHINA



**POPULATION:** 1.4 billion

**AUDIENCE SIZE IN CHINA:**  
2.04 million

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

**EQ TRAVEL SEGMENTS:**

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

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

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

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

**TRAVEL TRADE SHOWS:** Showcase Canada-Asia, CITAP

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

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



# 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  
Bufs 55+

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

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

Japanese visitors have been travelling to Yellowknife for more than 3 decades, and the Canadian north is well-known in Japan for its Aurora and natural attractions.

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

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

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

**STRATEGY:** The show, Focus Japan, is held every second year: the next will be held in October of 2021. In years where there is no trade show, we increase sales calls to maintain our presence. Ensure seasonality of the message to align with planning and booking timelines. Drive consumer demand through fresh Japanese language content across multiple channels. Nurture relationships with travel agents and key trade partners. Maintain a General Sales Agent in market. Establish long-term relationships with online travel agencies.

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





## SOUTH KOREA



**POPULATION:** 51.6 million

**AUDIENCE SIZE IN SOUTH KOREA:**  
3.56 million

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

**EQ TRAVEL SEGMENTS:**

Free Spirits 25-34, Free 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 eight nights stay.

Travellers from South Korea are interested in Canada’s natural and cultural settings. About 22% of potential visitors expressed interest in visiting Canada’s north. Of note, more than half of South Korean travellers to Canada were solo travellers: more than any other of the NWT’s target markets. More than half of South Korean leisure travellers booked an organized group travel package, predominantly via online travel agents or tour operators. 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



## GERMANY



**POPULATION:** 83.1 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. Germany remains the world’s 3rd largest outbound market in terms of tourism expenditures. 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.

Germans are a good fit for travel to Canada as they typically have 5 – 6 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 prior to booking.

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

**STRATEGY:** Similar to the North American strategy, focus will be on

increasingly digital delivery of destination information. We will drive consumer interest through social media accounts while redirecting website traffic. We will maintain relationships with media, travel trade and our General Sales Agent in market. Germany continues to show positive growth to the Western Arctic region in particular of the Northwest Territories with 177 recorded German visitors visiting this region in 2018. NWTT will align its tactics with 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 Touristic, SK Touristic, Dertour, TravelHouse/Hotel Plan (CH)



# AUSTRALIA



**POPULATION:** 25.7 million

**AUDIENCE SIZE IN AUSTRALIA:**  
995,500

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

**EQ TRAVEL SEGMENTS:**

Cultural Explorers 25-34,  
Social Samplers 55+

Australia ranks as a top 20 country across a wide range of indexes including the economy, international trade, investment, education, and other global indexes. Prior to the COVID 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 ski in winter months. Both seasons provide great opportunity for Northwest Territories combinations in the Western Canada combination.

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

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

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 very two years. This event is not scheduled for 2021, therefore NWT 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, NWT will motivate travellers with compelling reasons to visit around the two Aurora seasons 1) Summer/Spring and 2) Winter. Iconic distinctions of Aurora variations for NWT vs the rest of the world will be highlighted through Indigenous and cultural identities, free spirited local people and unique off the grid type experiences that provide a deep emotional resonance with travellers.

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

**DISRUPTORS:** Luxury Escapes, Trip A Deal, Inspiring Vacations

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



**POPULATION:** 128.9 million

**AUDIENCE SIZE IN MEXICO:**  
344,500

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

**EQ TRAVEL SEGMENTS:**  
Authentic Experiences 18-34,  
Free Spirits 35-54

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

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

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

**TRAVEL TRADE SHOWS:** Focus Mexico 2022

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

# APPENDIX B: PSYCHOGRAPHIC MARKETS



WEST  
TERRITORY

# FREE SPIRITS

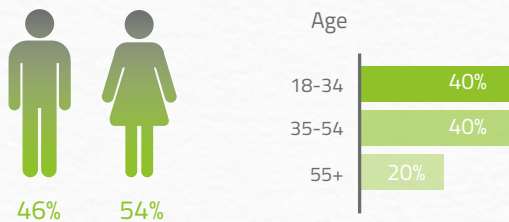
13% OF GLOBAL MARKET

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.

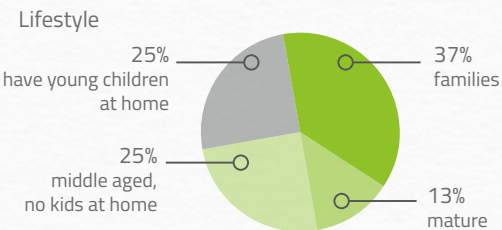
## SOCIAL VALUES

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



**Income:** Higher than average



## TRAVEL VALUES

Luxury, bragging rights, checklist samplers

# CULTURAL EXPLORERS

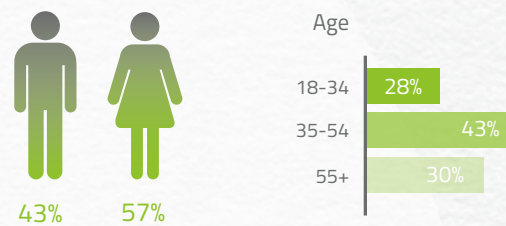
12% OF GLOBAL MARKET

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

## SOCIAL VALUES

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

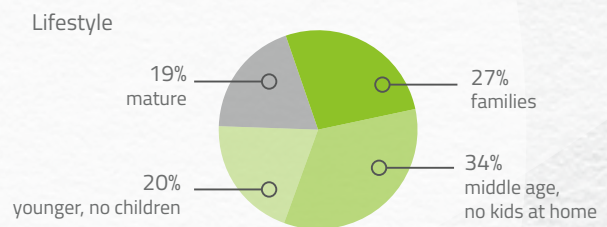
## DEMOGRAPHICS



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

**Education:** Higher than average

**Income:** Average



## TRAVEL VALUES

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

# AUTHENTIC EXPERIENCES

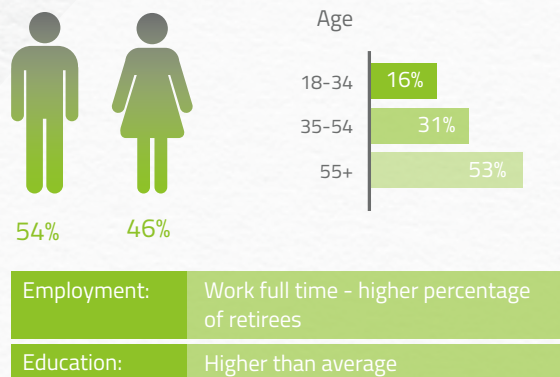
9% OF GLOBAL MARKET

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.

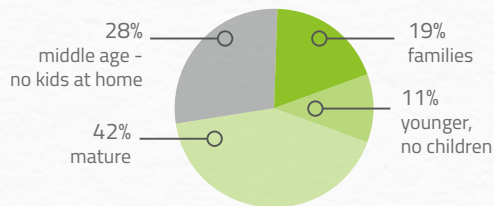
## SOCIAL VALUES

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

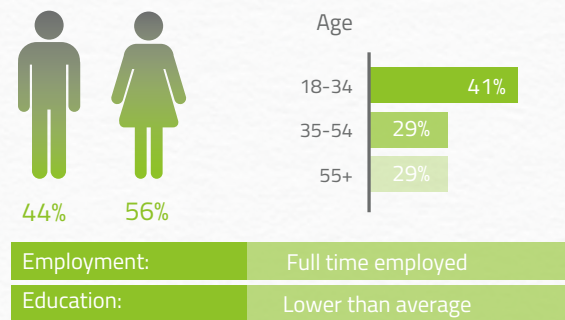
11% OF CANADIAN MARKET, 10% OF AUSTRALIAN MARKET

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.

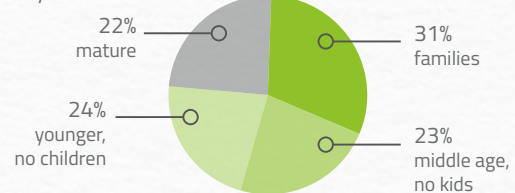
## SOCIAL VALUES

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.

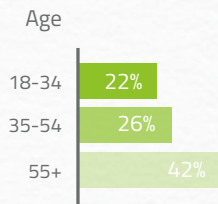
## SOCIAL VALUES

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

## DEMOGRAPHICS



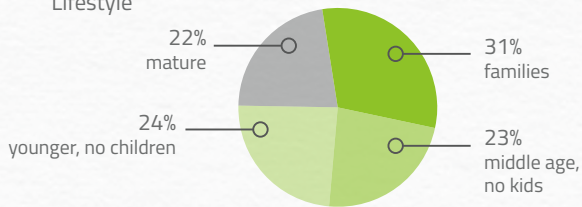
41% 59%



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



## TRAVEL VALUES

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

# PERSONAL HISTORY EXPLORER

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

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

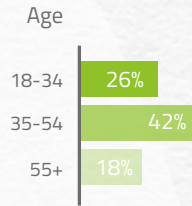
## SOCIAL VALUES

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

## DEMOGRAPHICS



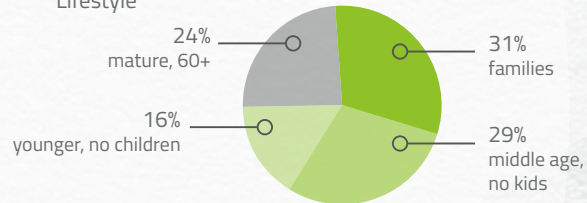
47% 53%



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



## TRAVEL VALUES

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

# REJUVENATORS

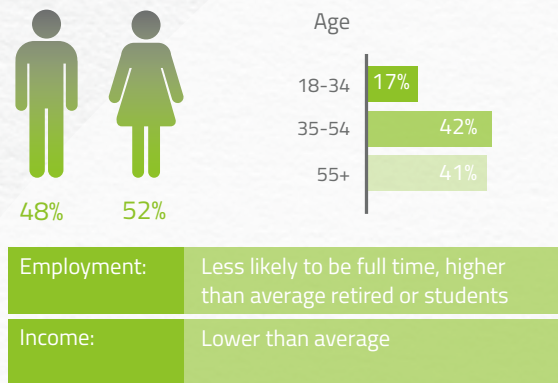
6% OF CANADIAN MARKET,

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

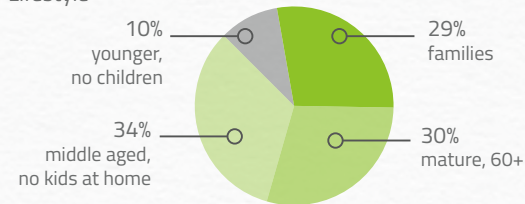
## SOCIAL VALUES

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

## DEMOGRAPHICS



### 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

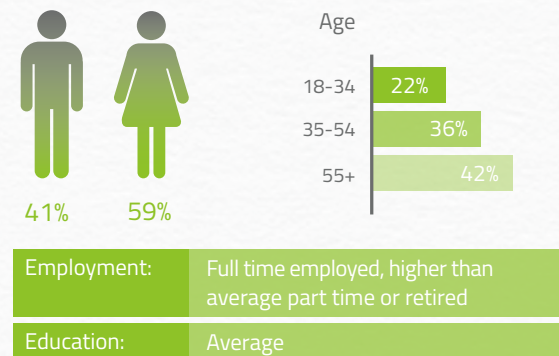
25% OF CANADIAN MARKET

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.

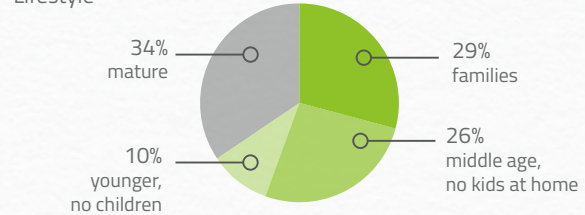
## SOCIAL VALUES

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

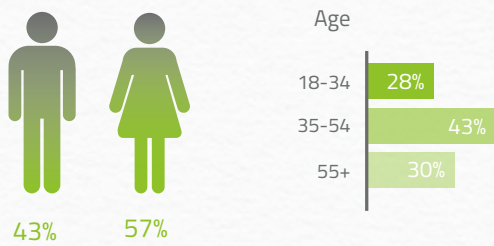
12% FRANCE MARKET, 16% JAPAN MARKET, 16% SOUTH KOREAN MARKET

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

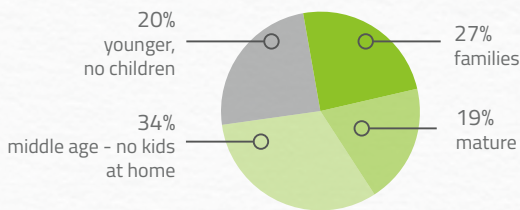
Importance of Spontaneity, guided by emotions and will change options easily, approach life with vitality, autonomy and personal control, feel more confident to deal with unexpected changes

## DEMOGRAPHICS



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

### Lifestyle



## TRAVEL VALUES

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

# ASPIRING ESCAPISTS

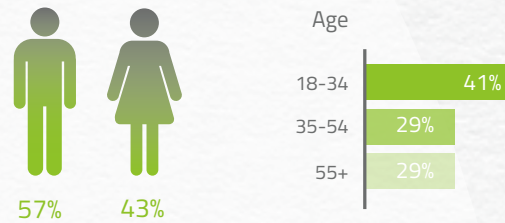
20% CHINA MARKET

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

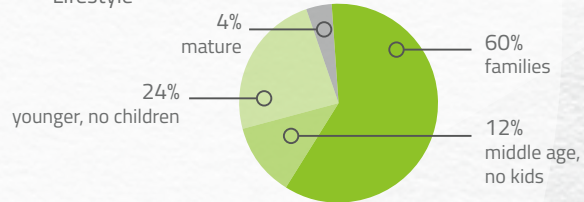
Financial security and social mobility, high importance on aesthetics, fashion and brand, time stress and fatalism from busy hectic lifestyles, voluntary simplicity

## DEMOGRAPHICS



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

### Lifestyle



## TRAVEL VALUES

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

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