

# NORTHWEST TERRITORIES RESIDENT SENTIMENT STUDY

ASSESSING THE IMPACT  
OF COVID-19  
WAVE 3

Research by Jeger, June 14, 2021

SPECTACULAR  
NORTHWEST  
TERRITORIES



# TABLE OF CONTENTS

- 3 Context and Methodology
- 6 Key Findings
- 12 Detailed Results

# CONTEXT AND METHODOLOGY

## CONTEXT

# PROJECT OBJECTIVE

NWT Tourism has been consistently aiming to understand and measure the level of “welcome” that NWT residents have overall towards tourists and how sentiment varies by region.

This is the third wave of research. Two previous waves were conducted in: October 2020 and February/March 2021.

Some metrics are measured to pre COVID-19 data from 2019.

# METHODOLOGY



Combination of a telephone survey via random digit dialing using computer-assisted telephone interviewing (CATI) technology and a web survey using computer-assisted web interviewing (CAWI) technology via an open-link online survey.



In field from May 10th to May 26th, 2021.



Sample consisted of 228 residents of NWT who are 19 years of age or older - 200 were obtained via RDD telephone interview and 28 were via open-link online survey promoted by Northwest Territories Tourism.



Using data from the 2016 Census, results were weighted according to age, gender, identify as Indigenous and region to create an approximately representative sample of the population in the Northwest Territories given the limitations of reaching the younger and Indigenous groups.



No margin of error can be associated with a non-probability sample. However, for comparative purposes, a probability sample of 228 respondents would have a margin of error of  $\pm 6.5\%$ , 19 times out of 20.

An aerial photograph of a tropical coastline. The top left shows a green, vegetated headland meeting a sandy beach. The water is exceptionally clear, showing various shades of turquoise and blue. Two seaplanes are visible: a white one with yellow and blue accents on the tail, and a bright red one with white accents. The red seaplane is in the foreground, closer to the viewer, while the white one is further down the beach. The text 'KEY FINDINGS' is overlaid in large, white, distressed font in the upper right quadrant.

# KEY FINDINGS

## KEY FINDING 1

# TOURISTS ARE WELCOME

# 86%

of NWT residents are welcoming to visitors travelling to their community from other parts of the Northwest Territories



# 83%

feel Canadian visitors travelling domestically are good for the Northwest Territories.

# 56%

Would welcome from other areas of Canada



# 79%

4 in 5 agree that visitors from other countries are good for the NWT



# 48%

would welcome visitors from US and other countries.



## KEY FINDING 2

# NWT RESIDENTS FEEL TOURISM ADDS VALUE

**54%**

feel that tourism is more important to their community now compared to before the pandemic



**76%**

agree that a healthy tourism industry is essential to the survival of businesses, amenities, and experiences enjoyed within the community



Almost **9 IN 10**  
(86 NWT residents agree that they%)  
want to see tourism return and grow in their community

**97%**

feel that the tourism industry is important to the Northwest Territories' economy



**66%** 

Or 2/3 of NWT residents feel the benefits of tourism to their community outweigh any negative impacts. This proportion looks to be trending higher since wave 1.



### KEY FINDING 3

# PROMOTING TOURISM IS ACCEPTED

**89%**

of NWT residents would be open to seeing ads promoting the NWT to the territory.



**72%**

would be happy to see NWT promoted to Canada



**63%**

would be happy to see NWT promoted to the US or other Countries

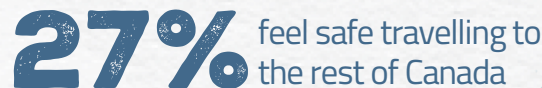


KEY FINDING 4

# PROMOTING TRAVEL TO NWT IS STILL KEY



There is an opportunity for us to capture NWT traffic and close by residents of other provinces.



KEY FINDING 5

# NWT HAS A HIGH NET PROMOTER SCORE

**51%** feel that the tourism industry is important to the Northwest Territories' economy



The overall Net Promoter Score is 26.

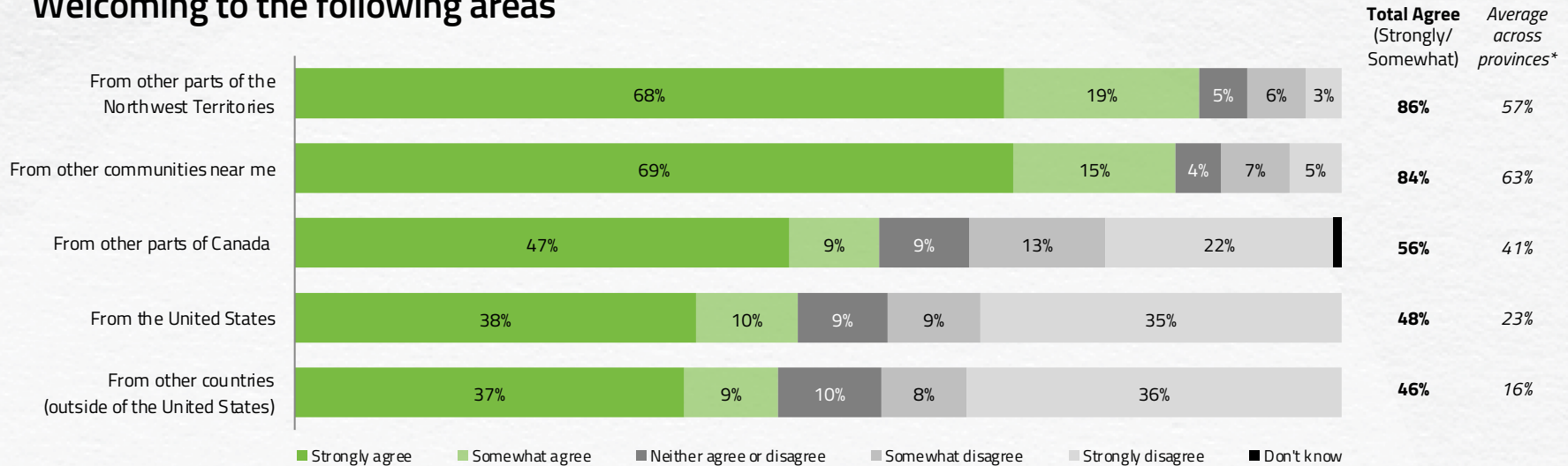
# DETAILED RESULTS

## ATTITUDES TOWARDS...

# TOURISTS VISITING THEIR COMMUNITY

## WAVE 3

### Welcoming to the following areas



\* Destination Canada Weekly COVID-19 Residents Sentiment 2021-06-01

**Q1.** Using a scale of 1 to 5 where 1 is 'Strongly disagree' and 5 is 'Strongly agree', to what extent do you agree or disagree with each of the following statements: "I would welcome visitors travelling to my community..."

**Note:** Responses 1% and less are not labelled **Base:** Total respondents (n=228)

## ATTITUDES TOWARDS...

# TOURISTS VISITING THEIR COMMUNITY BY WAVE

## Welcoming visitor from the following areas - Tracking

	Total Agree (Strongly/Somewhat)			Wave 3 - Total Agree (Strongly/Somewhat)			
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)	REGION		INDIGENOUS	
Regions travelling from	n=228	n=235	n=405	Yellowknife	Rest of NWT	Yes	No
From other parts of the Northwest Territories	<b>86%</b>	87%	86%	91%	82%	85%	89%
From other communities near me	<b>84%</b>	83%	85%	85%	83%	83%	86%
From other parts of Canada	<b>56%</b>	51%	45%	57%	54%	57%	54%
From the United States	<b>48%</b>	<b>35%</b>	21%	49%	47%	50%	47%
From other countries (outside of the United States)	<b>46%</b>	39%	30%	51%	42%	46%	47%

Numbers in red/green are significantly lower/higher than the previous wave at 95% confidence level

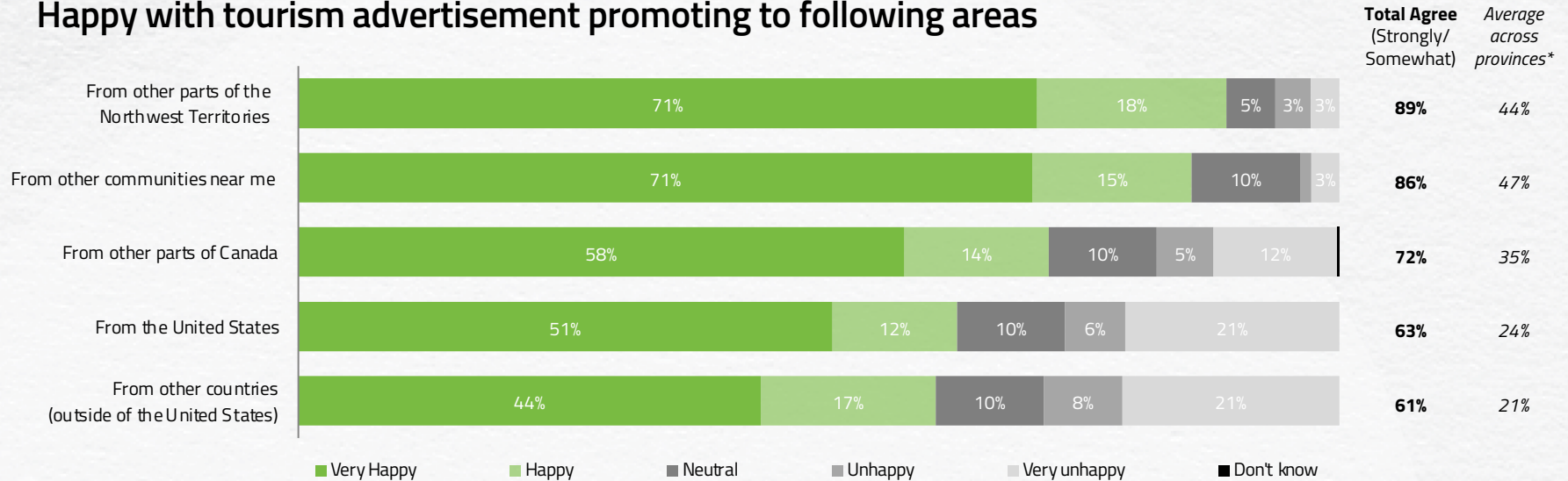
Q1. Using a scale of 1 to 5 where 1 is 'Strongly disagree' and 5 is 'Strongly agree', to what extent do you agree or disagree with each of the following statements: "I would welcome visitors travelling to my community..."

Base: Total respondents

## ATTITUDES TOWARDS...

# ADVERTISING PROMOTING VISITATION – WAVE 3

### Happy with tourism advertisement promoting to following areas



\* Destination Canada Weekly COVID-19 Residents Sentiment 2021-06-08

Q2. Using a scale of 1 to 5 where 1 is 'Very unhappy' and 5 is 'Very Happy', how would you feel if you saw an advertisement today promoting your community to each of the following regions as a place for visitors:

Base: Total respondents (n=228)

## ATTITUDES TOWARDS...

# ADVERTISING PROMOTING VISITATION BY WAVE

## Happy with tourism advertisement promoting to following areas

	Total Happy (Very happy/ Happy)		
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
Advertising promoting community to the following regions	n=228	n=235	n=405
From other parts of the Northwest Territories	<b>89%</b>	87%	86%
From other communities near me	<b>86%</b>	85%	84%
From other parts of Canada	<b>72%</b>	69%	58%
From the United States	<b>63%</b>	<b>53%</b>	38%
From other countries (outside of the United States)	<b>61%</b>	55%	44%

Numbers in red/green are significantly lower/higher than the previous wave at 95% confidence level

**Q2.** Using a scale of 1 to 5 where 1 is 'Very unhappy' and 5 is 'Very Happy', how would you feel if you saw an advertisement today promoting your community to each of the following regions as a place for visitors:

**Base:** Total respondents



## IMPORTANCE OF TOURISM

# INDUSTRY TO NWT ECONOMY

### Importance of tourism to NWT economy



	Total Important (Very/Somewhat)		
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
Unweighted	n=228	n=235	n=405
Very/Somewhat Important	97%	92%	92%

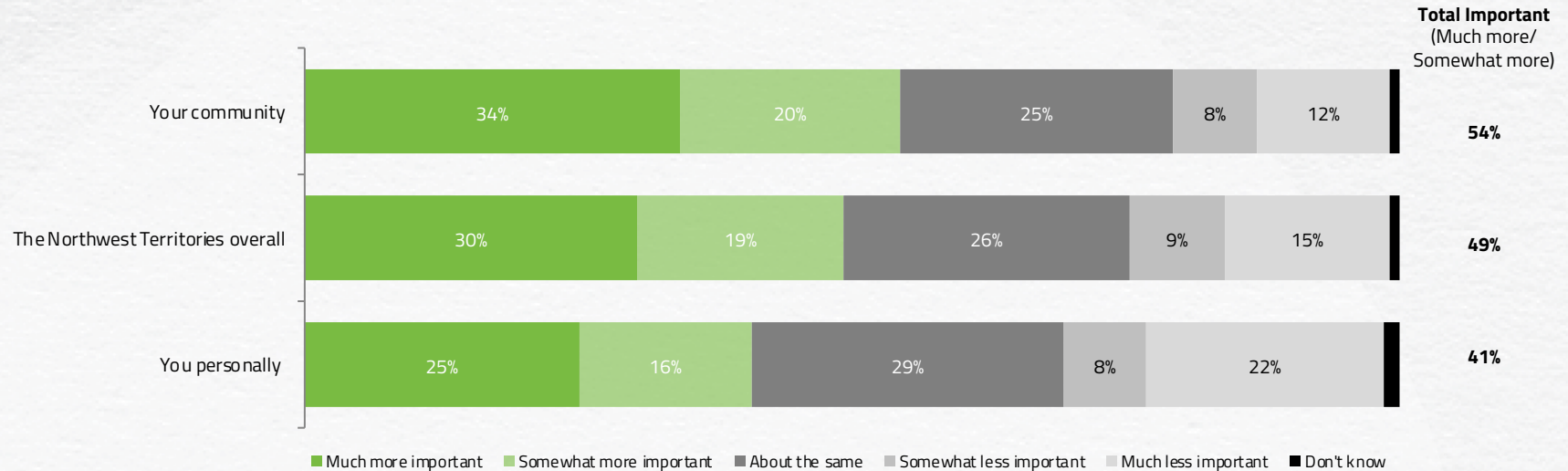
**Q3.** In your opinion, how important is the tourism industry to the Northwest Territories' economy? Overall, would you say it is ...

**Note:** Responses 1% and less are not labelled **Base:** Total respondents

## IMPORTANCE OF TOURISM NOW

# COMPARED TO BEFORE THE COVID-19 PANDEMIC

## Importance of tourism now compared to before COVID-19



Q4. How much more or less important do you feel tourism is to [each of three options] now compared to before the COVID-19 pandemic?

Note: Responses 1% and less are not labelled Base: Total respondents (n=228)

## IMPORTANCE OF TOURISM NOW

# COMPARED TO BEFORE THE COVID-19 PANDEMIC BY WAVE

- Attitudes towards the importance of tourism now compared to before the COVID-19 pandemic have increased directionally compared to the first wave conducted in October, most notably with reference to the importance to their community (from 43% to 54%).

## Importance of tourism now compared to before COVID-19 ➤

	Total More Important (Much more/Somewhat more)		
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
	n=228	n=235	n=405
Your community	54%	52%	43%
The Northwest Territories overall	49%	52%	47%
You personally	41%	37%	33%

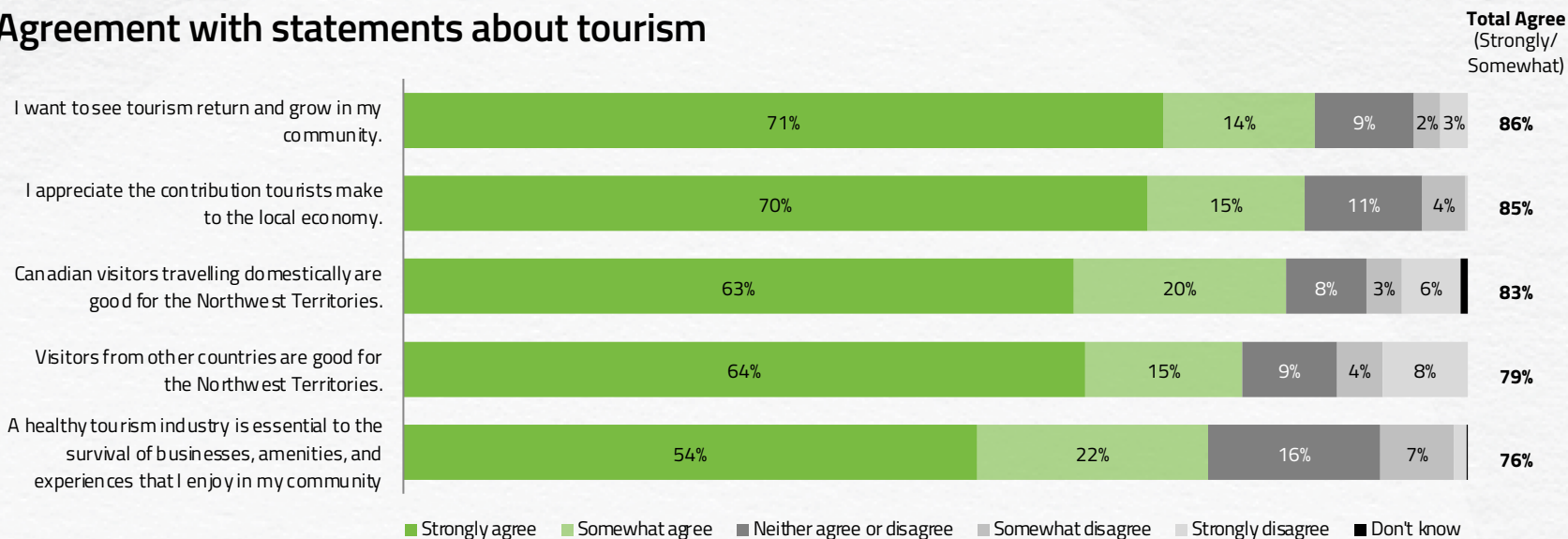
Q4. How much more or less important do you feel tourism is to [each of three options] now compared to before the COVID-19 pandemic?

Base: Total respondents

## LEVEL OF AGREEMENT

# WITH TOURISM VISITATION WAVE 3

## Agreement with statements about tourism



Q5. Using a scale of 1 to 5 where 1 is 'Strongly disagree' and 5 is 'Strongly agree', to what extent do you agree or disagree with each of the following statements:

Note: responses 1% and less are not labelled

Base: Total respondents (n=228)

## LEVEL OF AGREEMENT

# WITH TOURISM VISITATION BY WAVE

- Agreement with most of these statements about tourism appear to be gradually trending higher over the three waves.

### Agreement with statements about tourism >

	Total Agree (Strongly/Somewhat)		
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Nov. 2020)
	n=228	n=235	n=405
I want to see tourism return and grow in my community	<b>86%</b>	79%	76%
I appreciate the contribution tourists make to the local economy	<b>85%</b>	81%	83%
Canadian visitors travelling domestically are good for the Northwest Territories	<b>83%</b>	83%	78%
Visitors from other countries are good for the Northwest Territories	<b>79%</b>	76%	64%
A healthy tourism industry is essential to the survival of businesses, amenities, and experiences that I enjoy in my community	<b>76%</b>	69%	n/a

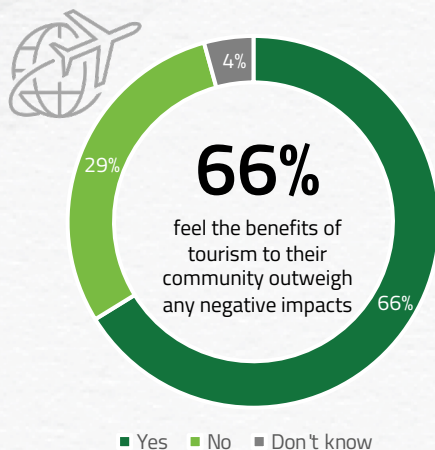
Numbers in red/green are significantly lower/higher than the previous wave at 95% confidence level

Q5. Using a scale of 1 to 5 where 1 is 'Strongly disagree' and 5 is 'Strongly agree', to what extent do you agree or disagree with each of the following statements:

Base: Total respondents

# BENEFITS OF TOURISM VS. NEGATIVE IMPACTS

## Benefits of tourism outweighing negative impacts



	Wave 3			Wave 3			
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)	REGION		INDIGENOUS	
	n=228	n=235	n=405	Yellowknife	Rest of NWT	Yes	No
Yes	<b>66%</b>	63%	54%	74%	59%	53%	80%
No	<b>29%</b>	34%	33%	21%	37%	44%	15%
Don't know	<b>4%</b>	3%	13%	5%	4%	3%	5%

Numbers in red/green are notably lower/higher than comparable group.

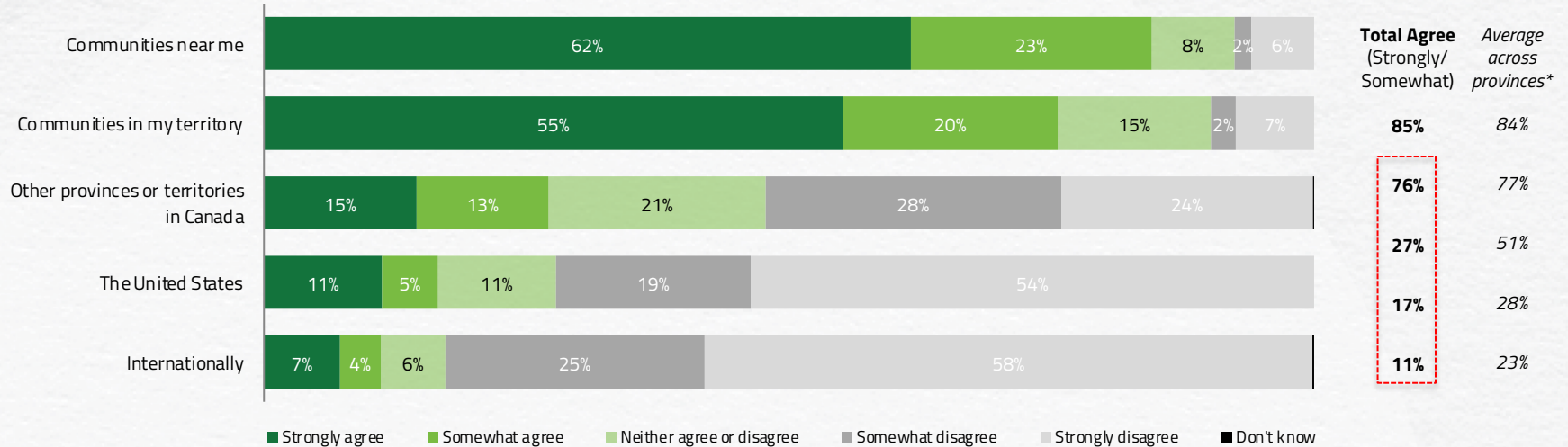
Q6. Thinking about tourism in your community, would you say the benefits to your community outweigh any negative impacts?

Base: Total respondents (n=228)

## ATTITUDES TOWARDS...

# SAFELY TRAVELLING – WAVE 3

### Safely travelling to the following areas



\* Destination Canada Weekly COVID-19 Residents Sentiment 2021-06-08

**Q8.** Using a scale of 1 to 5 where 1 is 'Strongly disagree' and 5 is 'Strongly agree', to what extent do you agree or disagree with each of the following statements: I feel safe to travel to...  
**Note:** Responses 1% and less are not labelled Base: Total respondents (n=228)

## ATTITUDES TOWARDS...

# SAFELY TRAVELLING BY WAVE

## Safely travelling to the following areas >

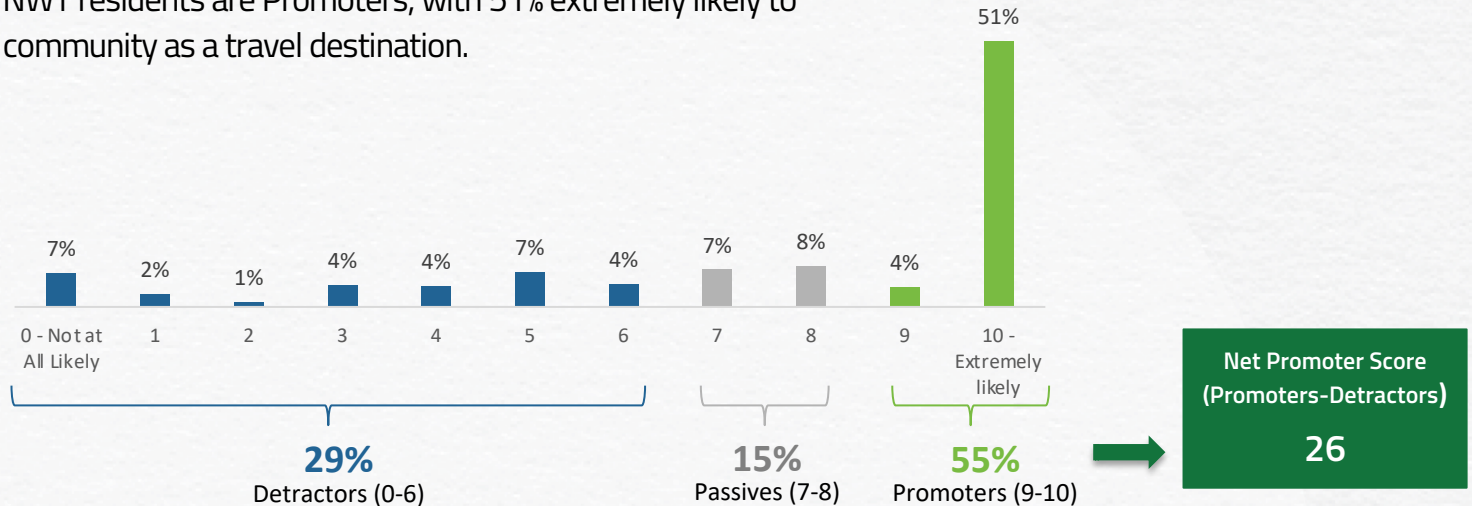
	Total Agree (Strongly/Somewhat)	
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)
Regions travelling to	n=228	n=235
Communities near me	<b>85%</b>	87%
Communities in my territory	<b>76%</b>	86%
Other provinces or territories in Canada	<b>27%</b>	26%
The United States	<b>17%</b>	9%
Internationally	<b>11%</b>	8%



## NET PROMOTER SCORE

# RECOMMEND AS TRAVEL DESTINATION

- The likelihood to recommend their community as a travel destination has a Net Promoter Score of 26 in Wave 3.
- Over half (55%) of NWT residents are Promoters, with 51% extremely likely to recommend their community as a travel destination.



Q9. How likely are you to recommend your own community as a travel destination to a friend, family member, colleague or acquaintance?  
Base: Total respondents (n=228)

## NET PROMOTER SCORE

# RECOMMEND AS TRAVEL DESTINATION BY WAVE

- The Net Promoter Score has increased slightly from last wave (from 21 to 26). This is due to some of the previous Passives moving into being Promoters in Wave 3.
- This is likely influenced by the higher net proportion of respondents this wave saying the benefits of tourism to their community outweigh the negative impacts.

## Agreement with statements about tourism >

	Total NPS	
	Wave 3 (May 2021)	Wave 2 (Feb. 2021)
	n=228	n=235
Promoters (9-10)	55%	50%
Passives (7-8)	15%	20%
Detractors (0-6)	29%	29%
<b>Net Promoter Score</b> (Promoters-Detractors)	<b>26</b>	<b>21</b>

**THANK YOU.**

**QUESTIONS?**