

NORTHWEST TERRITORIES RESIDENT SENTIMENT STUDY

ASSESSING THE IMPACT
OF COVID-19
WAVE 4

Created by Leger April 27, 2022

SPECTACULAR
NORTHWEST
TERRITORIES

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CONTEXT AND METHODOLOGY

CONTEXT

PROJECT UNDERSTANDING

Previously, the Northwest Territories (NWT) had limited measures on resident sentiment for tourism including their understanding of the value/benefits of tourism. Prior to the COVID-19 pandemic, a community survey was conducted by the NWT Bureau of Statistics in 2019 which included one question on resident sentiment—*do benefits of tourism outweigh any negative impacts?* A large majority (82%) answered “yes” to this question.

To further understand resident sentiment, NWT Tourism had planned to undertake a study in 2020 to establish benchmarks for several metrics. However, with COVID-19 and the NWT border closed to tourism, the value and validity in obtaining benchmarks would be questionable/biased. There were indications of heightened fear of visitors among residents in the NWT. During the height of the pandemic, some Indigenous communities were vocal about keeping the border closed and not wanting visitors in their community. As NWT Tourism has reopened its borders and initiated marketing NWT again to non-residents, they wish to have the latest understanding of resident sentiment, especially how welcoming they will be towards visitors by visitor origin.

CONTEXT

PROJECT OBJECTIVES

NWT Tourism continues to monitor the level of “welcome” that NWT residents have overall and how sentiment varies by location. Yellowknife is the primary centre for Aurora/Winter tourism from international markets, while the regions outside of the capital city tend more to have summer visitors primarily from Canada and the U.S. Specifically, the research objectives are:

- Continued tracking of measures consistent with those measured by Destination Canada in its regular resident sentiment survey:
 - Agreement with welcoming visitors travelling from different regions.
 - Level of happiness with seeing advertising promoting their community to different regions.
- Reprising the question “Do the benefits of tourism outweigh any negative impacts?” to compare to 2019 and the previous three waves of this survey.
- Understanding and measuring what NWT residents thought of the value of tourism to their community and territory before COVID-19 and what they think currently.

This is the fourth wave of research and we will compare the results from this to those from the prior three waves conducted in October 2020, February/March 2021, and May 2021.

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 March 28th to April 10th, 2022.



Sample consisted of 202 residents of NWT who are 19 years of age or older - 200 were obtained via RDD telephone interview and 2 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 202 respondents would have a margin of error of $\pm 6.9\%$, 19 times out of 20.



KEY FINDINGS

KEY FINDING 1

SIGNIFICANT JUMP IN WELCOME



NWT residents are significantly more welcoming towards tourists from all regions visiting their community in Wave 4 compared to Wave 3 in May 2021, and are most welcoming of domestic visitors.

Residents are happier with seeing advertisements promoting their community to all regions

In Wave 4, NWT residents are significantly happier with ads promoting their community to potential visitors from other parts of Canada, United States, and other countries.

KEY FINDING 2

NWT RESIDENTS AGREE TOURISM IS IMPORTANT TO THE ECONOMY

97%

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



3/4 of NWT residents feel that tourism is more important to their community and the NWT overall now compared to before the pandemic.



Those who rate the tourism industry as very important are far more likely to agree with the statements that *“a healthy tourism industry is essential to the survival of businesses, amenities, and experiences that I enjoy in my community,” “I appreciate the contribution tourists make to the local economy,”* and *“I want to see tourism return and grow in my community.”*

KEY FINDING 3

ATTITUDES TOWARDS TOURISM BENEFITS RECOVERED



8 IN 10

NWT residents feel the benefits of tourism to their community outweigh any negative impacts

76%

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

9 IN 10 

residents want to see tourism return and grow in their community, appreciate the contribution tourists make to the local economy, and believe visitors from other countries are good for the NWT

KEY FINDING 4

MORE WILLING TO ACCEPT VISITORS



Residents are significantly more willing to accept tourists visiting their community within the next three months compared to Wave 3



KEY FINDING 5

FEEL MOST SAFE TRAVELLING WITHIN THE NWT THAN TO OTHER DESTINATIONS

92%

feel safe travelling to communities near them

89%


feel safe travelling within the territory



40%
internationally



38% to the U.S.

51%  to other parts of Canada

KEY FINDING 6

NWT HAS A HIGH NET PROMOTER SCORE

6 IN 10

NWT residents to recommend their community as a travel destination



The overall Net Promoter Score is 48.

A scenic sunset over a large body of water. The sky is filled with soft, orange and yellow clouds, transitioning to a deep blue at the top. The sun is low on the horizon, casting a warm glow across the water. In the foreground, two seaplanes are docked on wooden floats. The plane on the left is white with a blue tail, and the one on the right is green with a white tail. The water is calm, reflecting the colors of the sky. In the distance, a dark line of trees marks the horizon.

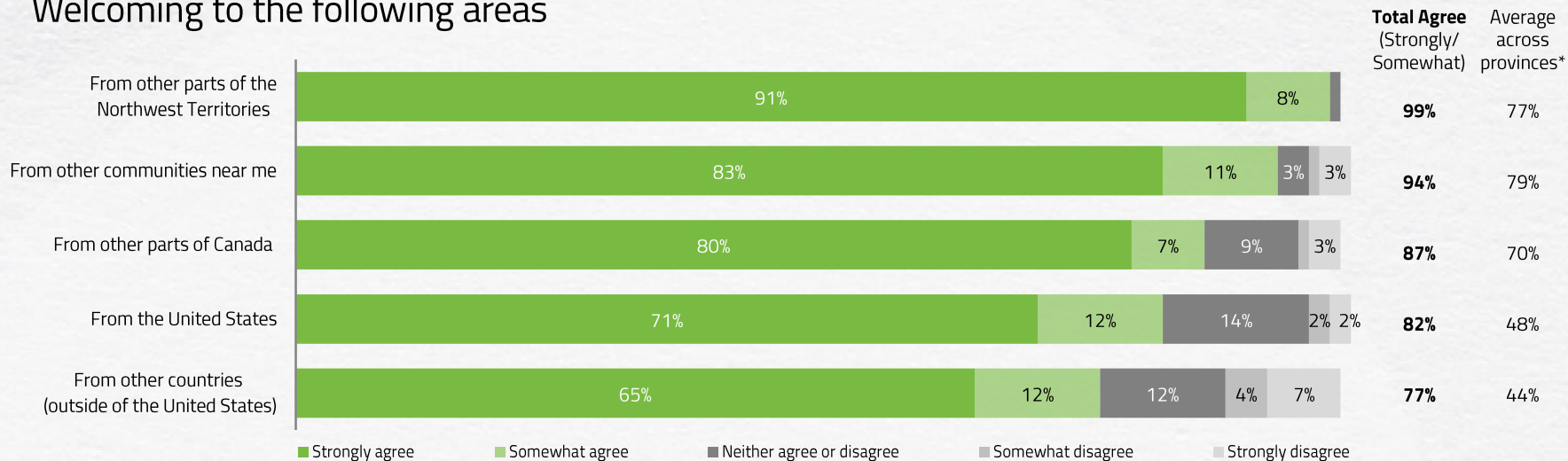
DETAILED RESULTS

ATTITUDES TOWARDS...

TOURISTS VISITING THEIR COMMUNITY

WAVE 4

Welcoming to the following areas



* Destination Canada Weekly COVID-19 Residents Sentiment 2022-04-05

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=202)

ATTITUDES TOWARDS...

TOURISTS VISITING THEIR COMMUNITY BY WAVE

Welcoming visitor from the following areas - Tracking

	Total Agree (Strongly/Somewhat)			
	Wave 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
Regions travelling from	n=202	n=228	n=235	n=405
From other parts of the Northwest Territories	99%	86%	87%	86%
From other communities near me	94%	84%	83%	85%
From other parts of Canada	87%	56%	51%	45%
From the United States	82%	48%	35%	21%
From other countries (outside of the United States)	77%	46%	39%	30%

Wave 4 - Total Agree (Strongly/Somewhat)			
REGION		INDIGENOUS	
Yellowknife	Rest of NWT	Yes	No
113	89	42	158
97%	100%	99%	98%
97%	91%	90%	98%
94%	80%	79%	93%
87%	78%	78%	86%
85%	70%	65%	88%

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

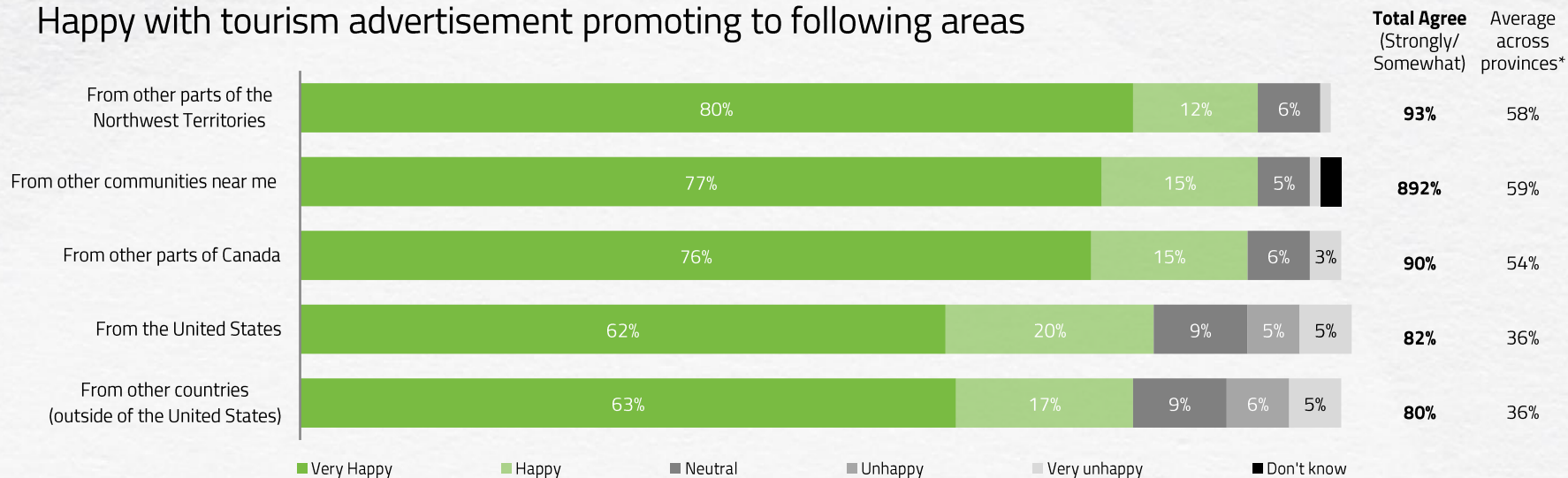
Q1. Using a scale of 1 to 5 where 1 is 'Strongly disagree' and 5 is 'Strongly agree', to what extent do you agree or disagree with each of the following statements: "I would welcome visitors travelling to my community..."

Base: Total respondents

ATTITUDES TOWARDS...

ADVERTISING PROMOTING VISITATION – WAVE 4

Happy with tourism advertisement promoting to following areas



* Destination Canada Weekly COVID-19 Residents Sentiment 2022-03-29

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=202)

ATTITUDES TOWARDS...

ADVERTISING PROMOTING VISITATION BY WAVE

Happy with tourism advertisement promoting to following areas

	Total Happy (Very happy/ Happy)			
	Wave 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
Advertising promoting community to the following regions	n=202	n=228	n=235	n=405
From other parts of the Northwest Territories	93%	89%	87%	86%
From other communities near me	92%	86%	85%	84%
From other parts of Canada	90%	72%	69%	58%
From the United States	82%	63%	53%	38%
From other countries (outside of the United States)	80%	61%	55%	44%

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

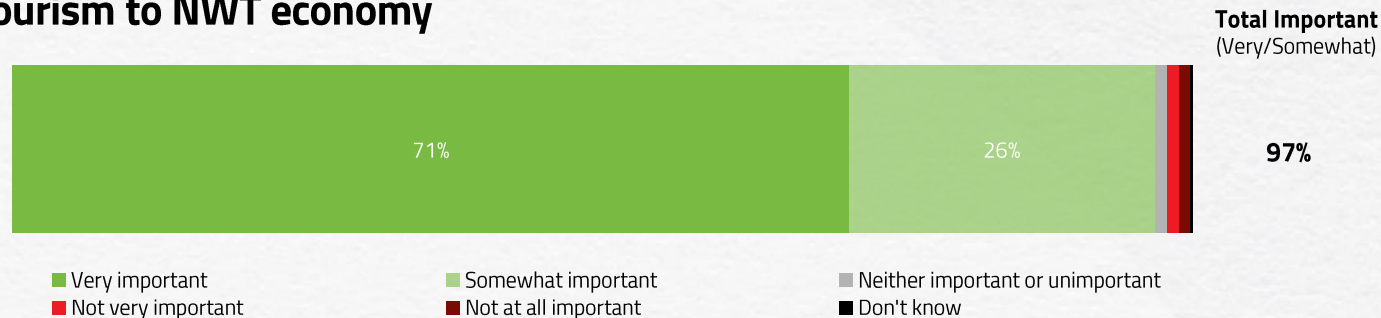
Q2. Using a scale of 1 to 5 where 1 is 'Very unhappy' and 5 is 'Very Happy', how would you feel if you saw an advertisement today promoting your community to each of the following regions as a place for visitors:

Base: Total respondents

IMPORTANCE OF TOURISM

INDUSTRY TO NWT ECONOMY

Importance of tourism to NWT economy



	Total Important (Very/Somewhat)			
	Wave 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
Unweighted	n=202	n=228	n=235	n=405
Very/Somewhat Important	97%	97%	92%	92%

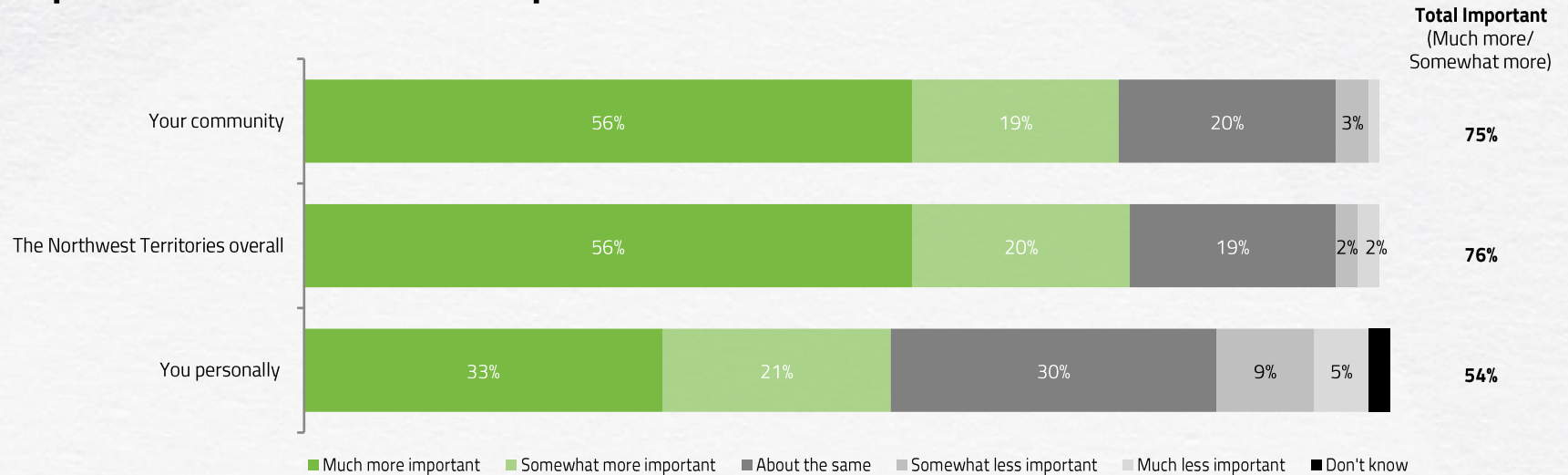
Q3. In your opinion, how important is the tourism industry to the Northwest Territories' economy? Overall, would you say it is ...

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=202)

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 to 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 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
	n=202	n=228	n=235	n=405
Your community	75%	54%	52%	43%
The Northwest Territories overall	76%	49%	52%	47%
You personally	54%	41%	37%	33%

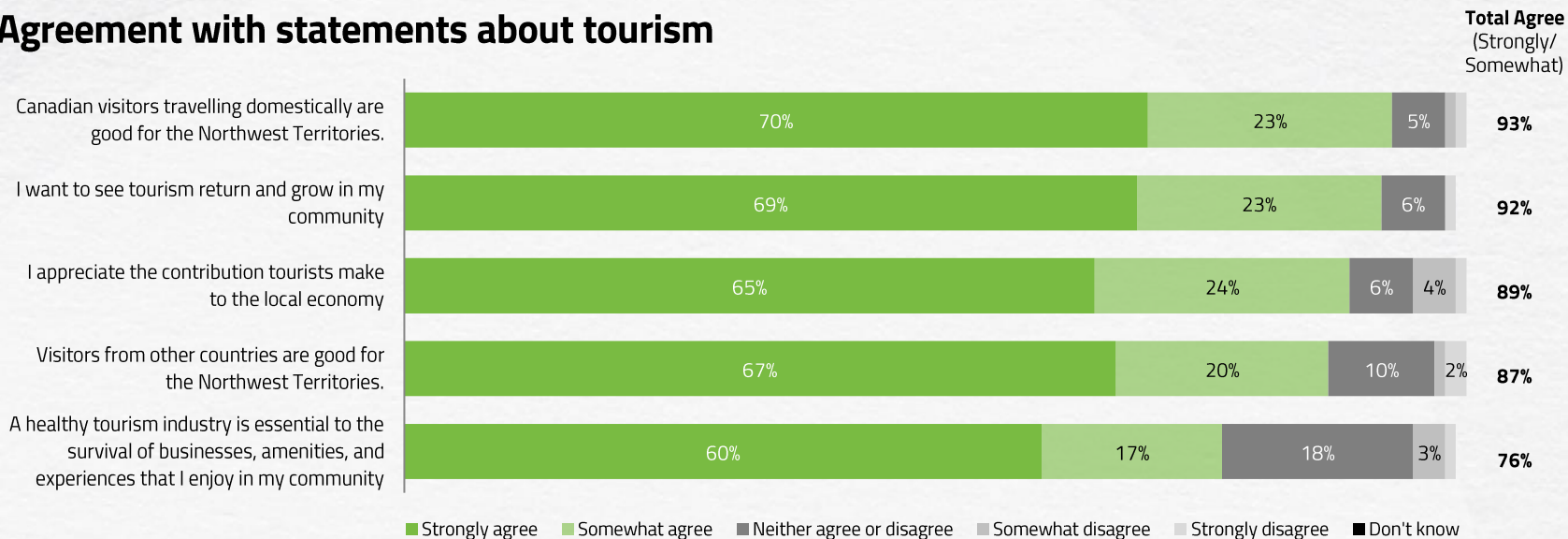
Q4. How much more or less important do you feel tourism is to [each of three options] now compared to before the COVID-19 pandemic?

Base: Total respondents

LEVEL OF AGREEMENT

WITH TOURISM VISITATION WAVE 4

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=202)

LEVEL OF AGREEMENT

WITH TOURISM VISITATION

BY WAVE

- Agreement with all of these statements about tourism gradually trended higher over the four waves.

Agreement with statements about tourism ➤

	Total Agree (Strongly/Somewhat)			
	Wave 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Nov. 2020)
	n=202	n=228	n=235	n=405
I want to see tourism return and grow in my community	93%	83%	83%	78%
I appreciate the contribution tourists make to the local economy	92%	86%	79%	76%
Canadian visitors travelling domestically are good for the Northwest Territories	87%	79%	76%	64%
Visitors from other countries are good for the Northwest Territories	89%	85%	81%	83%
A healthy tourism industry is essential to the survival of businesses, amenities, and experiences that I enjoy in my community	76%	76%	69%	n/a

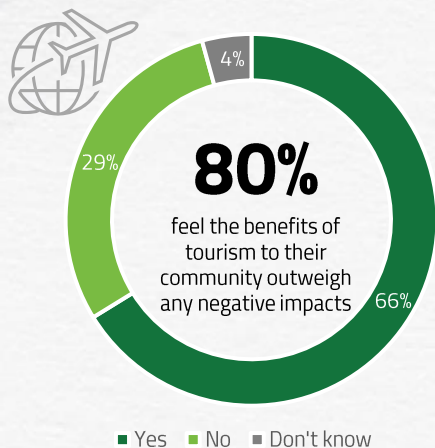
Numbers in red/green are significantly lower/higher than the previous wave at 95% confidence level

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 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)	Wave 1 (Oct. 2020)
	n=202	n=228	n=235	n=405
Yes	80%	66%	63%	54%
No	13%	29%	34%	33%
Don't know	7%	4%	3%	13%

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

Wave 4			
REGION		INDIGENOUS	
Yellowknife	Rest of NWT	Yes	No
113	89	42	158
83%	76%	72%	87%
10%	16%	17%	9%
7%	8%	11%	4%

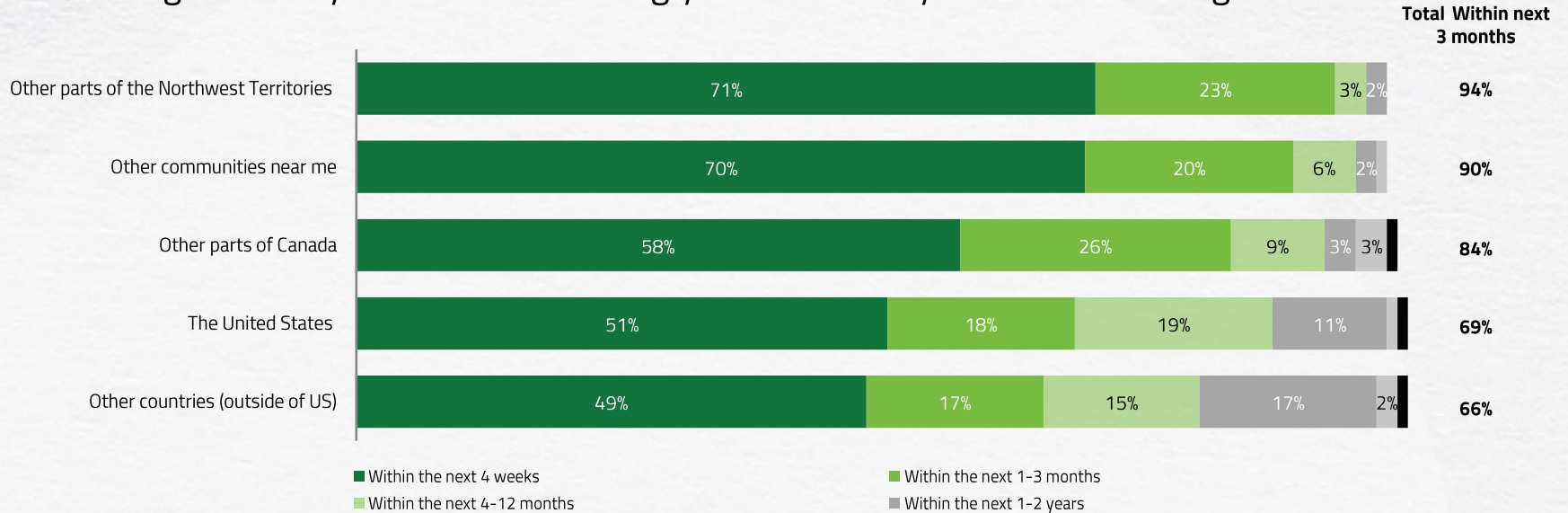
Q6. Thinking about tourism in your community, would you say the benefits to your community outweigh any negative impacts?

Base: Total respondents (n=202)

WHEN LIKELY TO...

ACCEPT TOURISTS WAVE 4

When might be okay with tourists visiting your community from the following areas



Q7. When might you be willing to accept tourists from each of the following areas to visit your community? Would you accept tourists from...

Note: Responses 1% and less are not labelled Base: Total respondents (n=202)

WHEN LIKELY TO...

ACCEPT TOURISTS BY WAVE

When might be okay with tourists visiting your community from the following areas

	Total Within 3 months			
	Wave 4 (Apr. 2022) n=202	Wave 3 (May 2021) n=228	Wave 2 (Feb. 2021) n=235	Wave 1 (Oct. 2020) n=405
Other parts of the Northwest Territories	94%	69%	70%	77%
Other communities near me	90%	62%	69%	73%
Other parts of Canada	84%	25%	18%	28%
The United States	69%	14%	12%	7%
Other countries (outside of the United States)	66%	9%	8%	10%

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

Wave 4 - Total Total Within 3 months			
REGION		INDIGENOUS	
Yellowknife	Rest of NWT	Yes	No
113	89	42	158
93%	94%	95%	93%
87%	92%	91%	90%
89%	80%	79%	89%
79%	60%	58%	79%
76%	57%	57%	74%

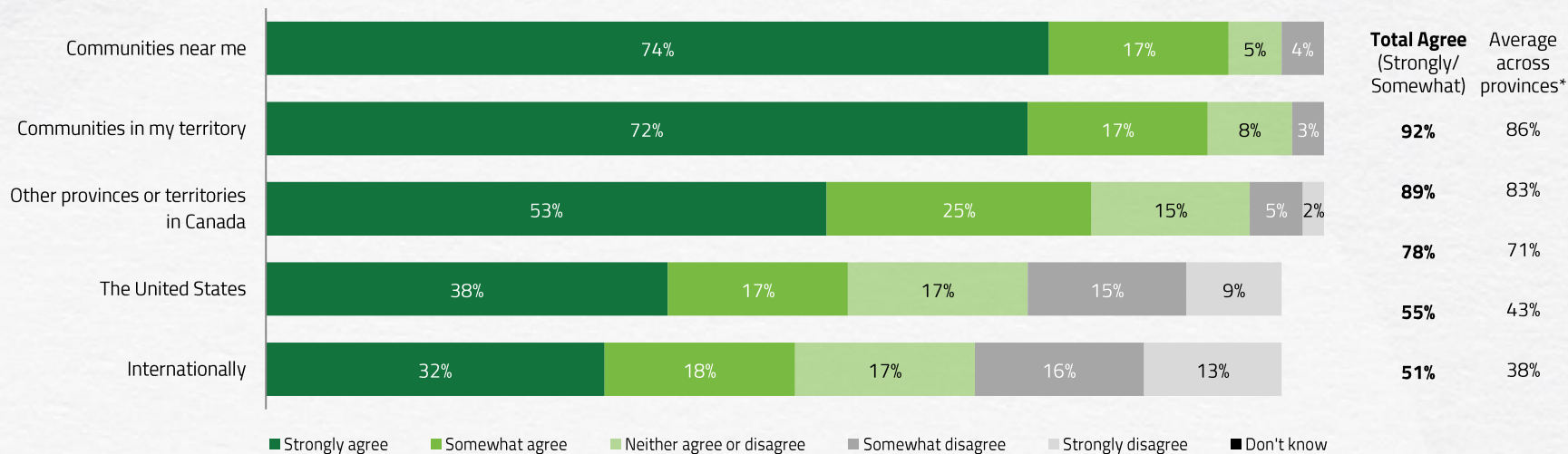
Q7. When might you be willing to accept tourists from each of the following areas to visit your community? Would you accept tourists from...

Base: Total respondents

ATTITUDES TOWARDS...

SAFELY TRAVELLING – WAVE 3

Safely travelling to the following areas



* Destination Canada Weekly COVID-19 Residents Sentiment 2022-04-05

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=202)

ATTITUDES TOWARDS...

SAFELY TRAVELLING BY WAVE

Safely travelling to the following areas >

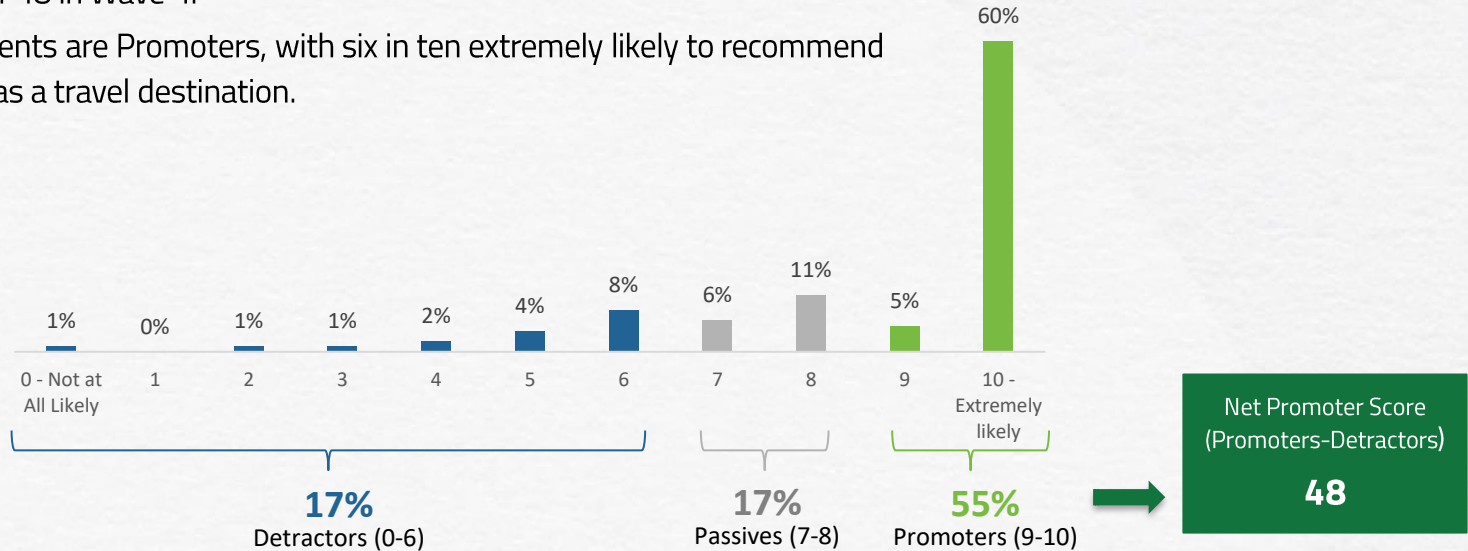
	Total Agree (Strongly/Somewhat)		
	Wave 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)
<i>Regions travelling to</i>	n=202	n=228	n=235
Communities near me	92%	85%	87%
Communities in my territory	89%	76%	86%
Other provinces or territories in Canada	78%	27%	26%
The United States	55%	17%	9%
Internationally	51%	11%	8%

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

NET PROMOTER SCORE

RECOMMEND AS TRAVEL DESTINATION

- The likelihood to recommend their community as a travel destination has a Net Promoter Score of 48 in Wave 4.
- 65% of NWT residents are Promoters, with six in ten 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=203)

NET PROMOTER SCORE

RECOMMEND AS TRAVEL DESTINATION BY WAVE

- The Net Promoter Score has increased notably compared to Wave 3 (from 26 to 48), with 10% jump in the proportion of Promoters (those who rate their likelihood to recommend their own community as a travel destination to a friend/family member/colleague/acquaintance at 9 or 10 on a scale of 10).

Likelihood to recommend NWT as a travel destination >

	Total NPS		
	Wave 4 (Apr. 2022)	Wave 3 (May 2021)	Wave 2 (Feb. 2021)
	n=202	n=228	n=235
Promoters (9-10)	65%	55%	50%
Passives (7-8)	17%	15%	20%
Detractors (0-6)	17%	29%	29%
Net Promoter Score (Promoters-Detractors)	48	26	21

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

THANK YOU.

QUESTIONS?