

Hay River,
Northwest Territories
Tourism Development Plan
2012



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Hay River Tourism Development Plan: Executive summary

This report is the result of a four-step data gathering process designed to help the Town of Hay River, NT take the next steps in developing its tourism offerings. The researchers (Dr. Heather Mair, Associate Professor in the Department of Recreation and Leisure Studies at the University of Waterloo) and Matthew Kerswill (a graduate student in the same department) were charged with helping the community evaluate its progress since the adoption of a tourism development plan in 1999 and to identify opportunities and priorities for future development through a five-year plan.

To prepare for the development of this plan, the researchers conducted: (1) interviews, focus groups and a short survey with members of the Hay River community, (2) evaluation of background materials and market research, (3), on-site data gathering, and (4) data analysis and plan development in direct consultation with members of the Trade and Tourism Advisory Committee.

The report first presents the results of the researchers' analysis of data collected during the aforementioned steps and aims to set out a number of achievable goals for the next five years. The following key findings are discussed in depth in the report:

1. The most important target market in the short term is the “rubber tire”, Canadian tourist.
2. On-line booking through an up-to-date, secure, accessible, and easy to navigate website is essential for helping travellers find and book their own accommodations, experiences and activities.
3. Most tourists to the north are relatively wealthy and well-educated. They are also interested in cultural experiences and packages that make travel hassle-free. Hay River has enormous cultural and natural resources, which can be carefully built on and coordinated to provide an anchor to hold tourists a little longer.
4. Outside of business and convention travel, Hay River is not well enough developed to be an international destination in its own right but it can be an indispensable component of a larger Northern experience.

These findings lead to the development of the following ‘vision’ for tourism in Hay River:

To build on the considerable strengths of Hay River, particularly its position as a travel hub of the north, to: (1) attract more rubber tire tourists and to keep them in the community for a longer period of time and (2) develop the capacity (i.e., human resources, partnerships, reputation) to move to the next level and become an indispensable component of travel to the Canadian North.

The vision presented here can be realized through a modest, incremental five year process that concentrates as much on building on and improving access to what Hay River already has to offer as on preparing a platform for expanding tourism in the community.

The first year, “building a solid foundation” reinforces a key recommendation from the 1999 report to hire a tourism coordinator. In short, many or most of the priorities, steps and recommendations set out in this report will not be met without the dedicated attention of a trained professional. Years two, three and four, “Coordinating, collaborating and developing the tourism platform” presents a number of practical, action-oriented marketing and development priorities, which will help to pull together the tourism offerings already present in the community but will rely on the relationships built in the first year for success. Year five, “Assessing development and setting your sights even higher” sets out strategies for evaluating the impact of the measures undertaken in the first four years and incorporates a process for meaningful engagement with the community for future tourism development.

Tourism in Hay River is in its infancy and there is no better time to embrace a modest, incremental process for continued development.

Introduction:

Tourism has been recognized as an important part of Hay River's economy and future development. The town of Hay River along with the Hay River Trade and Tourism Advisory Committee decided to update their tourism development plan, last updated in 1999 (The North Group, 1999). Heather Mair, a professor of tourism and leisure in the Department of Recreation and Leisure Studies at the University of Waterloo was approached in April, 2011 to update the original plan and to suggest new avenues for tourism development in the community. Matthew Kerswill, an MA student from the same department, was hired to help with the project in the fall of 2011.

Steps of the study & developing the plan:

The researchers were charged with updating the existing plan and developing a five-year strategic plan to shape future development. To do this, we followed four inter-related steps and each is described in detail below.

1. Research with human participants

As all research with human participants in the Northwest Territories must first be approved and licensed by the Aurora Research Institute in Inuvik, an application was made to the Institute in the fall of 2011 and the project was approved in January, 2012. In addition, all research with human participants undertaken by members of the University of Waterloo community must also be granted ethics approval by the University of Waterloo's Office of Research Ethics. This application was approved in October, 2011.

2. Background research and making connections with key players

While waiting for the research license, the researchers reviewed all existing material about Hay River and its current tourism offerings. A review of the most recent tourism plan (The North Group, 1999) was also carried out in order to get a sense of what the community was looking to achieve when the plan was last updated. Elements of the original plan, including market analyses and the suggestion of new tourism opportunities, were evaluated and updated where appropriate. Some aspects of the original plan were adopted directly for clarity and consistency.

Next, one researcher (Matt) set up a teleconference with Tammy Buchanan, Director of Recreation and Community Services and members of the Hay River Trade and Tourism Advisory Committee. This discussion provided more details regarding the background of the community as well as what had been accomplished as a result of the previous plan. This

telephone meeting provided a good understanding of the current level of tourism in Hay River as well as some sense of the community's goals for the future.

Matt also undertook an extensive assessment of current research relevant to tourism development in the region. Territorial-level research, particularly market evaluations, was examined as were more locally-focused documents relating to Hay River. Existing promotional material for Hay River and the town's website were also closely assessed.

Additionally, Matt met with tourism expert Dr. Stephen Smith at the University of Waterloo to discuss how the current market research can contribute to the development of tourism in Hay River. Their discussion focused on marketing the town of Hay River and how the relevant research can be applied to the development of this plan.

3. On-site data gathering

In-depth interviews and focus groups

The research license was approved in January and Matt's travel to the site for in-person data gathering was organized shortly thereafter. Tammy Buchanan arranged a number of interviews with key players and tourism operators to allow for the development of a first-hand impression of the community and its tourism offerings and potential. It also afforded the opportunity to meet and conduct additional in-depth interviews with as many members of the community as possible. 13 participants who were identified as being connected to tourism development in the community were interviewed individually. Among these participants were tourism outfitters, longtime residents, photographers, and members of Katl'odeeche First Nation. As all participants were guaranteed confidentiality in order to help them feel comfortable about sharing their thoughts candidly, they cannot be named in this report.

Two focus groups were also conducted. First, Matt met with the twelve-member Trade and Tourism Advisory Committee and then with three members from the Seniors' Society. Although Matt's time in Hay River was relatively short, every effort was made to connect with as many members of the community as possible to allow for the creation of as accurate a picture of tourism (and goals for future tourism) in the community as was feasible. The interviews and focus groups were conducted between January 23 and 25, 2012. The list of questions used to guide both the in-depth interviews and the focus groups can be found in Appendix A and B, respectively.

On-line survey

In addition to the focus groups and interviews, Matt and Tammy Buchanan set up an online survey using a tool called Survey Monkey. This survey was released to the public via the town's community announcement page on Facebook. It was designed to ask residents

questions about tourism in Hay River and what they would like to see happen regarding the development of tourism in years to come. In the two days (January 23-25, 2012) that the survey was available online, 13 community members participated. A list of these questions can be found in Appendix C.

On-the-ground exploration and observation

While in Hay River, Matt was also treated to a tour of the community by a long-time resident and was able to partake in a number of tourism-related experiences including a Bombardier tour on Great Slave Lake and Dogsledding with a local musher. The tour of town offered a sense of the major sights in Hay River as well as an overview in terms of how the town had changed over the last few decades. These on-ground-experiences helped provide a broader context for understanding the interviews and focus group discussions. The Bombardier and dogsledding tours were one of the highlights of the trip; giving Matt a first-hand sense of what Hay River has to offer to potential visitors.

4. Analyzing the data and building the plan with community input

Upon return to the University of Waterloo, the audio recordings of the interviews and focus groups were analyzed in order to pull out the main ideas as expressed by participants. These ideas contributed directly to the development of the plan as they gave the researchers a clear sense of what participants felt should to be done to further tourism development in the community. The five issues most commonly expressed during the interviews, focus groups and in the online survey are discussed in depth below.

It is important to note that many research participants also expressed a concern that many recommendations set out in the 1999 plan (The North Group, 1999) had not been followed and that the report had included too many large-scale recommendations. To this end, the researchers decided to concentrate on providing a smaller number of modest yet doable recommendations in an effort to make the plan relevant and valuable to the community. In addition, we wanted to capture the creativity, enthusiasm and optimism expressed by many participants. Leaders in Hay River and the broader community are very excited about the potential presented by tourism development. This plan aims to act as a tool to help Hay River begin to reach its tourism potential.

A draft of the plan was created and submitted electronically to the Trade and Tourism Advisory Committee on April 16, 2012. Comments and questions regarding the plan were solicited and the draft plan was presented by Matt to the Advisory Committee as well as Hay River Town Council in Hay River in May of 2012. As no suggestions were offered

regarding changes to the draft plan, the final version was submitted electronically on June 5, 2012.

Tourism Update: What's happened since 1999

In 1999, the North Group predicted that “Hay River could feasibly double its visitation in the next 10 years to approximately 12 000 pleasure travelers by 2010.” (p. 3). In addition, the report set out the following objective for tourism in Hay River:

...Hay River should aim to increase the value of the travel industry by 5% in the first year of this plan and by 20% per annum for the following four years. (p. 45)

Unfortunately, unforeseeable events including the global economic downturn have led to decreased visitor numbers worldwide and research indicates that these objectives have not been met. However, it should also be noted that one of the challenges with regard to determining the extent to which the community has increased visitation numbers is a lack of dependable, formal methods to track visitation in the community. More reflection on the need for better data gathering is provided below in the form of a recommendation in the five-year plan.

The 1999 report laid out a number of very detailed goals, objectives and initiatives to be achieved in the five years following its adoption. Although the overall goal of increasing travel to 12 000 pleasure travelers by 2010 was not realized, efforts have been made to put some of the 1999 plan into action. Table 1 sets out which specific goals have been reached as well as which initiatives remain outstanding and Table 2 sets out which specific objectives have been achieved and which remain outstanding to date. The comments in *italics* reflect the researchers' assessment regarding the need for more progress on some initiatives and these points are reinforced or re-visited in the recommendations provided throughout the five-year plan.

Table 1: Goals achieved and initiatives outstanding since 1999

Goals Achieved	Outstanding Initiatives
A developed fisherman's wharf paved with bricks, has a food kiosk, sells fresh fish, has pictorial/interpretive displays with an overview of the area	A marine museum next to the Old Hudson Bay building in old town, or the Visitor Centre at the town entrance. The museum would be in a boat donated by Northern Transportation Company Limited (NTCL). If on the site next to the Old Hudson Bay building, it would be clean, with appropriate signage
A museum in the Old Hudson Bay building which is refurbished, site cleaned and set up.	Other old boats located in the area would have plaques with history of each vessel.
Local fishing trips, half-day and full day, for visitors	One or more buildings in the shipping area would have plaques with history of each vessel.
Canoe, kayak, bicycle, paddleboat, and motorboat rentals.	One or more buildings in the shipping area would have murals of water scenes or related scenes.
A market, held once a week during the summer, in the fisherman's wharf area. Market includes craft sales, food, farmers' produce, antiques, etc.	Ad hoc tours less than once a week, of the NTCL shipping yards, for small groups by reservation.
Abandoned railway lines within town linked to the town trails for walking or biking	Caboose cars on railway tracks, renovated into a Bed & Breakfast.
Tours of the town of Hay River (<i>semi-organized</i>)	The Hay River Hotel beautified as part of the waterfront.
Twin Falls tours tied in with guided tour of historical Dene portage along Sandy Creek on the Reserve (<i>semi-organized</i>)	Ad hoc tours less than once a week, of the NTCL shipping yards, for small groups by reservation.

Goals Achieved	Outstanding Initiatives
“Thank God It's Friday” activities at the Dene Cultural Institute, featuring local artists and musicians	Caboose cars on railway tracks, renovated into a Bed & Breakfast.
Traditional activities at the Dene Cultural Institute such as moose-hide tanning.	A seasonal restaurant on a boat
Interpretive medicine trail and bush skills trail.	A vessel taking visitors and locals on harbour/river cruises
Dogsledding tours in the winter, targeting the independent German and independent Japanese travelers (<i>partially achieved, but needs to be promoted more clearly</i>).	A youth hostel linked to the International Hostel Association.
Bombardier tours to view the Aurora targeting the independent German and independent Japanese travelers. (<i>can be promoted more clearly</i>)	Flightseeing tours of the falls and Wood Buffalo National Park.
Well-developed parks and campgrounds with interpretive signage and special activities.	Murals on buildings down town (can be protected by vandalism by special coating)
Week-long fishing packages at full service and light-housekeeping lodges and camps.	A minimum of 20 train tours to the town each year, each tour hosting 65 passengers.
	Community feasts, inviting everyone from town, West Channel, Dene Reserve, to welcome visiting dignitaries, train passengers and other special tour groups such as the Norweta Cruise ship passengers (if Norweta launching out of Hay River).
	An interpretive display at the West Channel where fresh fish fries are held for visitors
	Murals on buildings in West Channel.

Goals Achieved	Outstanding Initiatives
	A bridge spanning the river, linking downtown with the Hay River Reserve (as proposed). The bridge becomes part of the tour route to expedite transportation between areas for visitors
	Shuttle services by boat, between the Reserve and downtown, targeting visitors.
	Reserve tours.
	Interpretive tipi display on reserve at the Dene Cultural Institute, establishing a Dene cultural village
	Tipi accommodations for summer visitors.
	Parks Canada would have preserved the historic buildings on the Reserve. There would be tours of the historic church, with talking displays featuring recordings of Elders with their pictures.
	Murals on buildings on Reserve.
	Common signage throughout the Hay River area identifying points-of-interest, historical buildings, and tour routes. Signs would be used to differentiate different types of products or sites, i.e. stern wheels marking the route to the 'Port' and waterfront and related historic sites; fishing boats marking the route to West Channel and fishing sites; canoe paddles marking the route to the Reserve and sites of historical importance.
	Aurora program, highlighting Dene legends, for Elderhostel.
	Pre and post-convention tours of Twin Falls, town and reserve, providing an overview of the area- historic Dene portage, building of the Mackenzie highway, Metis history, commercial fishing, shipping, new town, Reserve.

Goals Achieved	Outstanding Initiatives
	Dinners by special request on barge on the river for convention delegates.
	Packages for special interest groups featuring Wood Buffalo National Park, Fort Smith, Hay River, Twin Falls, and Yellowknife.
	Permanent visitor Information display in the proposed new arena.
	Interpretive display of the Aurora Borealis at the summer visitor information centre and in the proposed new arena.
	Golfing packages hosting Yellowknifers and other NWT residents.
	Cross country skiing packages hosting Yellowknifers and other NWT residents.
	Convention packages targeting NWT groups and small associations within Canada.
	Diamond tours of any facilities established within the community in relation to diamond mining.
	A package targeting the German market which focuses on northern winter experiences, featuring trapping, ice-fishing, aurora viewing, dog-sledding. Packaged from Frankfurt on direct flights to Whitehorse, on to Yellowknife and Hay River.
	A small mini hotel/dormitory with thermal windows on the roof, so that visitors can lie in bed and experience the Northern lights. Needs to be out of town, away from the lights.

Goals Achieved	Outstanding Initiatives
	<p>Hot air balloon tours over the falls, the Fort Providence Mackenzie Wood Bison Sanctuary area, Great Slave Lake in the winter. Would consist of air travel to or from key landing sites in park, and ground transportation back. Would follow the highway route for safety wherever possible. In the summer, tethered tours (balloon held in one place) could be offered.</p>
	<p>A minimum of 20 motor coach tours per summer spending at least 1.5 days each in Hay River.</p>

Table 2: Objectives achieved and outstanding since 1999

Objectives Achieved	Outstanding Objectives
Expanding the meetings and conventions business	Hay River should aim to increase the value of the travel industry by 5% in the first year of this plan, and by 20% per annum for the following four years.
Maximizing visitation to special events such as the speedboat races, golf tournaments and other sporting events.	To achieve this growth, the community and partners should be spending at least \$ 55,000 on advertising and promotion and will need to assess costs to theme the community.
Hay River should also lobby government and tourism bodies to properly fund tourism marketing and to assist in the marketing of the Hay River product offerings. <i>(partially achieved; needs to continue)</i>	Increasing road travel, i.e. diverting more of the traffic from going directly to Yellowknife, Fort Smith or Fort Simpson.
Website <i>(partially achieved; needs improvement)</i>	Increasing the frequency of motor-coach and small group package tours.
Travel trade and Fam trips.	Attracting more NWT residents to Hay River.
Print Media - Print advertisements should be concentrated in a few highly targeted publications that reach the road touring target group. <i>(partially achieved, needs to continue)</i>	Marketing and development should encourage longer stays and increased expenditures by visitors.
Brochures	Expanding the existing product base to give visitors more to see and do.
Trade and Consumer shows	Informing them of the wide menu of attractions and activities available in a readily available form
	making souvenirs and arts and crafts more widely and readily available

Objectives Achieved	Outstanding Objectives
	Developing more events and special activities, such as a summer market, inter-community golf tournaments
	Find the human resources necessary to liaise with tour operators, meeting and convention prospects and co-ordinate the activities of partnership initiatives.
	Roadside signage that specifically highlights tourism opportunities
	Logo-new logo has to be created to reflect the potential new theme of the town.
	Visitor Centre displays. A new display should be developed for the 60th Parallel Visitors Centre that incorporates the new theme and is consistent with the tone and images of the new Hay River brochure.
	Media releases-
	Database Development and Data Collection through an up-to-date database.
	Partnerships- forged to target the touring market (auto, fly-drive) with communities along road systems in the southern Mackenzie and possibly northern Alberta and B.C.
	Community Involvement and Visitor Kit
	Special Event flyers- Whenever a special sporting or cultural event is planned, a flyer can be produced and distributed throughout the community, at appropriate visitors Centres and mailed to target audiences
	Launch of the Heritage Centre

Unfortunately, these tables are rather *lopsided* as there are many more items on the ‘to-do’ list than accomplishments and research indicates that Hay River is not ready to take most of these steps. In preparing the current plan, there was a reluctance to add additional items to these lists however they are reproduced here because they include valuable and important goals to work towards in the future. The five-year strategic plan outlined at the end of this document highlights a process for getting ready to move towards meeting some of these goals and the members of the Hay River community are encouraged to keep these lists ‘alive’ and to continue to work towards achieving as many of the goals listed here as possible.

Market Conditions for tourism development in NWT and Hay River: Tourism in difficult economic times

According to the NWT Marketing Plan for 2012/2013, additional, unforeseen occurrences including the current state of the NWT sport hunting sector, federal passport and visa requirements, and the earthquake and tsunami in Japan in March of 2011 have had an “adverse effect on the number of visitors and visitor spending in the NWT in recent years”. (p. 8). The total visitation to the NWT in 2010/2011 (leisure and business travelers) was 65 136 – a 4% drop from the previous year. Of those travelers, 40 401 were traveling for leisure. In addition, these travelers spent 9% less than they spent in 2009; the lowest it has been in the last five years.

However, as the Canadian economy begins to recover, there are signs the situation in NWT is getting better. Moreover, positive developments such as the excellent media coverage generated by the two royal visits to the North in 2011 and the introduction of a new tourism plan for the Territory (*Tourism 2015: New Directions for a Spectacular Future*) will aid in the recovery and stabilization of tourism in the region. The next few sections provide more detail regarding the dimensions of the NWT tourism market. These are important considerations for Hay River tourism development.

Threats and opportunities for tourism in NWT

The NWT Marketing Plan for 2012/13 presented a list of opportunities and threats facing the tourism industry (pp. 9-10). Those points most relevant to the case of tourism

development in Hay River are presented in the table below.

Table 3: Threats and Opportunities for tourism in NWT

Opportunities for tourism in NWT	Threats to tourism in NWT
<ul style="list-style-type: none"> • Prominent positioning of the North by the federal government and an increased awareness and interest in Canada's North both domestically and internationally • The completion of the Mackenzie River bridge and ongoing improvements to our highway system could increase rubber tire traffic • Two direct flights by Edelweiss Air to Yellowknife this September could open up more opportunities to package to the German and Swiss markets • A growing interest in the Deh Cho Travel Connection (DCTC) driving route, particularly with the German market • Growing interest in Aurora experiences in the North American market • NWT Tourism has been working closely with CanaDream and Fraserway RV rental companies to encourage the development of an RV satellite depot in Yellowknife • The enhancement of the infrastructure of the Yellowknife Airport (runway length, customs support, etc.) would allow for long-range aircraft from international markets • Increased size of our target market, as more boomers become empty nesters and have the time and funds to travel • Vast tracts of pristine wilderness such as Nahanni National Park, the rivers of the Sahtu and the Mackenzie Delta at a time when wilderness is diminishing in other parts of the world 	<ul style="list-style-type: none"> ▪ Ongoing global recession and strong Canadian dollar could reduce travel by middle income people • Increased competition in the Aurora sector (Alaska, Finland and Norway are main competition. Whitehorse and Fort McMurray are using aggressive marketing campaigns to gain market share) • Limited air capacity into the NWT • The deteriorating condition of the Liard Hwy continues to have a negative impact on the road touring market • Rising fuel costs (vehicle, aircraft, etc.) are increasing cost to travel here • Increased competition for our type of products from locations that can often offer products at a lower price • Aging infrastructure, undercapitalized operations • Increasing insurance rates and increasing potential for litigation for tourism operators

Understanding the NWT Tourism Market

Visitor Demographics

Every four years, the Government of the Northwest Territories conducts a Leisure Visitor Exit Survey (Tourism Research Update, 2011). According to this survey, about 57% of NWT

visitors in 2010/2011 were male and 43% are female, and almost all of them were adults or seniors. These visitors were highly educated: approximately 80% have post-secondary education while only 20% have high school or less.

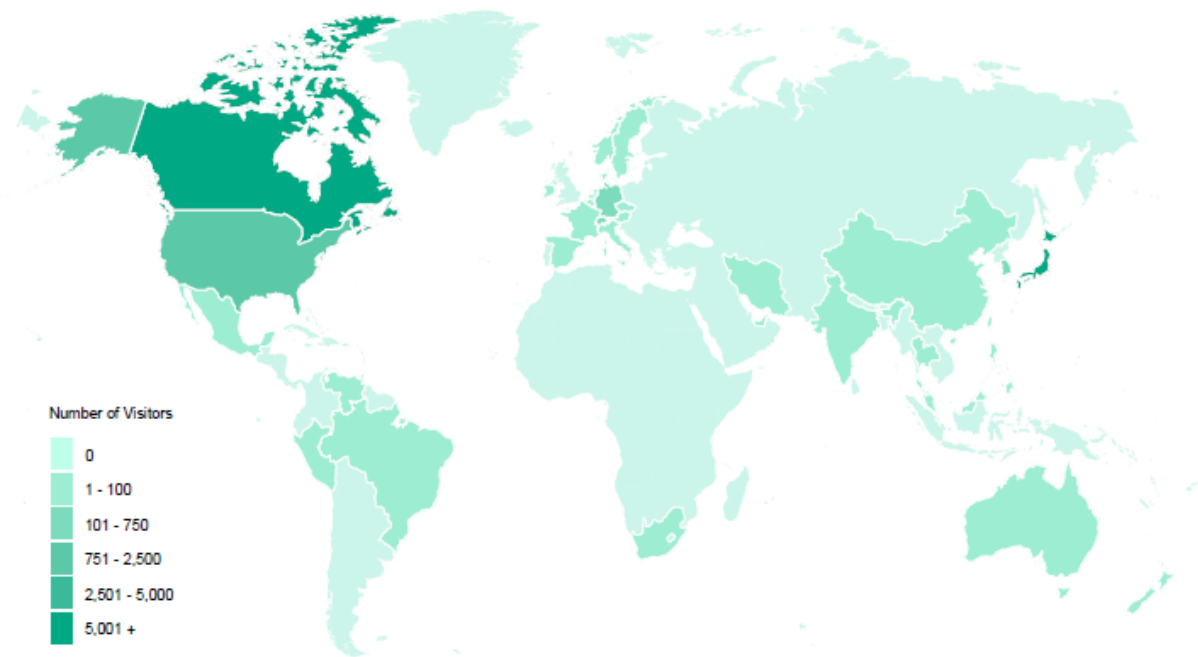
Similar to the education levels, visitors to NWT also have relatively high household incomes. Approximately 70% of visitors had incomes higher than \$50,000 with 36% reporting incomes of \$90,000 or higher. This data suggests that the target markets for potential visitors to Hay River are people who are highly educated who have a high annual income. These types of visitors are seeking established tourism operators in regards to accommodations and activities. The high income levels suggest the people visiting Hay River have money to spend but in order to capture this market, exciting, engaging activities that are neatly packaged need to be made available and promoted.

Visitor Demographics	Gender:	Age:	Education:	Occupation:	Household Income:
	43% - Female 57% - Male	76% - Adults 6% - Children 17% - Seniors	20% - High school or less 66% - College/University 14% - Masters/PhD	38% - Professional 23% - Retired 10% - Self-employed 28% - Other	30% - \$49,999 or less 34% - \$50,000-\$89,999 36% - \$90,000 or higher

(source: Tourism Research Update, 2011)

Visitor Origin by Country

The following map and figure shows that most visitors to NWT are domestic travelers from Canada. Japan and the United States represent the next largest group of visitors. Although 13% of visitors to NWT originate in Japan, the marketing efforts for Hay River should be directed primarily towards Canada and the United States. The rationale for this is that Hay River alone does not yet have the stand alone appeal to attract international visitors. Japanese visitors can be included into a tourism package one they have already arrived in the Territory. This is considered in more detail below in the section on key findings.

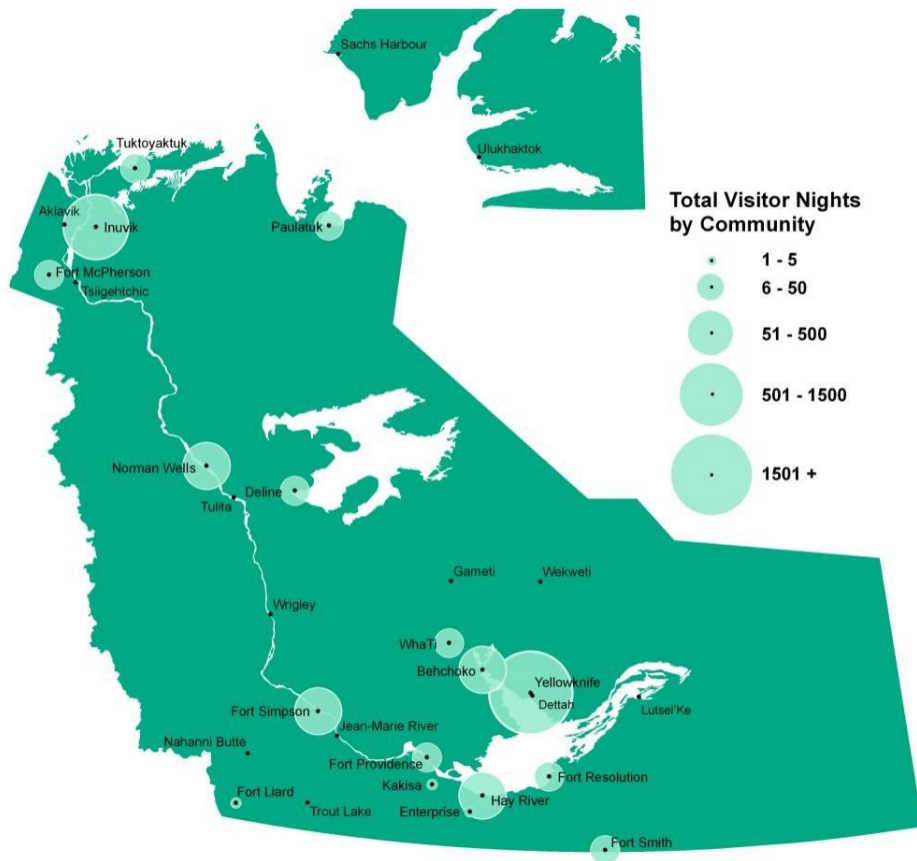


Top 5 Countries of Visitor Origin:

Canada:	77%
Japan:	13%
United States:	6%
Switzerland:	1%
Germany:	1%

(source: Tourism Research Update, 2011)

Total Visitor Nights (by Community)



(source: Tourism Research Update, 2011)

The image above clearly shows the total visitor nights by community in 2010/2011. As expected, Yellowknife attracted the largest number of visitors, while the Hay River area attracted between 51-500 visitor nights (Visitor Night = 1 person staying 1 night). These numbers suggest that the number of overnight visitors to Hay River is relatively small. This means that the community should, at least in the short term, focus on day visitors who have chosen to explore the town for the day while en route to another destination such as Yellowknife. These numbers also suggest there is a need to develop tourism packages that will capture visitors for overnight stays and this point is taken up again below.

Purpose of travel and spending trends

Visitor Statistics						Visitor Spending (millions)				
Purpose of Travel	2006/07	2007/08	2008/09	2009/10	2010/11	2006/07	2007/08	2008/09	2009/10	2010/11
Aurora Viewing	7,000	7,300	5,500	5,400	6,800	\$ 9.3	\$ 9.6	\$ 7.3	\$ 7.2	\$ 6.4
Fishing	7,700	7,500	7,300	6,400	5,400	\$ 18.0	\$ 17.5	\$ 17.0	\$ 12.6	\$ 12.0
General Touring	13,300	15,100	14,800	14,500	12,000	\$ 7.5	\$ 8.5	\$ 8.3	\$ 8.1	\$ 9.5
Hunting	1,200	900	900	800	400	\$ 16.2	\$ 13.0	\$ 12.5	\$ 10.1	\$ 4.3
Outdoor Adventure	2,100	2,100	2,100	1,900	1,900	\$ 6.8	\$ 6.9	\$ 6.8	\$ 6.1	\$ 5.8
Visiting Friends & Relatives	9,000	11,700	9,300	12,900	13,700	\$ 3.8	\$ 5.0	\$ 4.0	\$ 5.4	\$ 6.6
Total Leisure Travellers	40,300	44,600	39,900	41,900	40,200	\$ 61.6	\$ 60.5	\$ 55.9	\$ 49.5	\$ 44.6
Total Business Travellers	35,500	34,900	33,600	26,200	24,800	\$ 78.8	\$ 77.4	\$ 74.6	\$ 58.1	\$ 49.5
TOTAL	75,800	79,500	73,500	68,100	65,000	\$ 140.4	\$ 137.9	\$ 130.5	\$ 107.6	\$ 94.1

(source: Tourism Research Update, 2011)

The table above illustrates an important trend in spending by visitors to the area. Importantly, visitor numbers in the Aurora Viewing and Visiting Friends and Relatives segments are rising. Additionally, Outdoor Adventure visitor numbers have increased by about three percent. These numbers indicate that marketing efforts should be directed to travelers who are already in NWT. For the aurora viewing market, promotional materials should be directed to those visiting Yellowknife. A package deal that offers visitors an opportunity to view the northern lights outside of a major city could be offered. As indicated earlier, those travelling to NWT have high incomes and are able to afford an overnight trip to Hay River to see the northern lights. Furthermore, efforts should be made to promote family-oriented recreation pursuits such as walking trails. These points are presented again in the key findings section as well as in some of the recommendations included in the five-year plan.

Tourist expectations and unrealized experiences

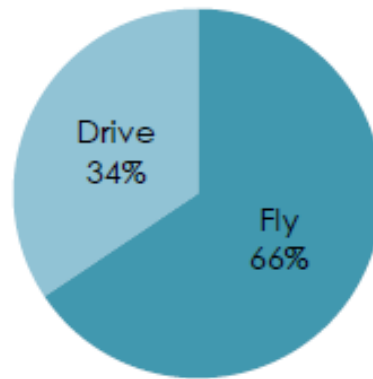
The following question and image were taken from the 2011 NWT Tourism Research Update and are reproduced here because they provide a clear indication of what visitors *expect* of their travel experience even if they didn't have a chance to partake in those activities. The size of the word reflects how frequently it showed up in responses and illustrates the level of demand for tourism products, which are areas upon which Hay River can capitalize. Hay River can offer almost all of these products and can take steps to better capitalize on capturing the market through improved organization, coordination and promotion.

Q: What activities did you want to do, but didn't?



Transportation to NWT

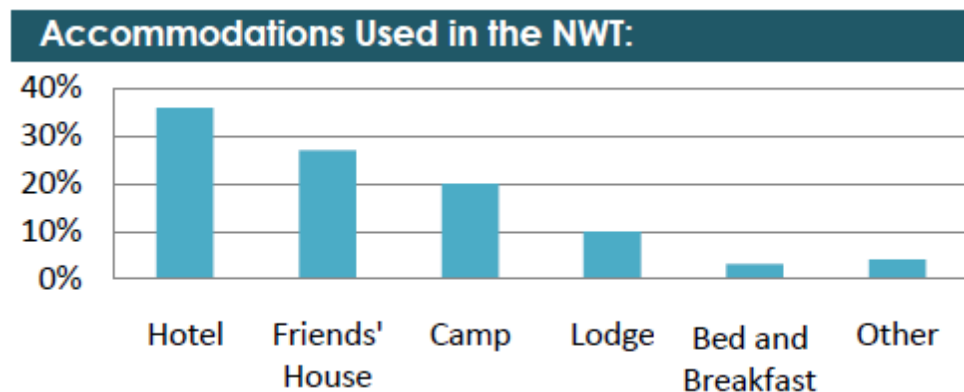
The following chart indicates that most visitors to NWT choose to fly; however, it also shows that there are a significant number of people who drive to the territory. As noted above, Hay River should focus its efforts on the driving or “rubber tire” visitors. This point is made in the key findings and in recommendations provided in the five-year plan.



(source: Tourism Research Update, 2011)

Accommodations in NWT

The following graph shows that majority of the travelers coming to NWT are staying in hotels and at friends' houses followed closely by camps. As a result of these findings, Hay River should continue to partner with hotels, especially in terms of developing tourist packages designed to keep people in the community more than one day. The graph also demonstrates that there is a need to market activities towards visitors arriving by car and recreational vehicle as they are likely to stay at a friends' house or at a campground.



(source: Tourism Research Update, 2011)

Key markets, near-term and emerging opportunities

Near-term and long-term efforts to increase visitation to Hay River must be considered in light of the various demographic data outlined above. The following sub-sections outline what is best considered as a near-term, key target market for tourists to Hay River and then present two different kinds of emerging opportunities (domestic and non-domestic) for long-term development.

Key target market: The rubber tire tourist

In Canada, RV (recreational vehicle) travel is on the rise. According to the Canadian Tourism Research Institute (2011) RV sales in Canada have increased by 30% year-over-year in the last 3 years. The increase is likely a result of an increasing desire for lower cost travel and the interest in compelling experiences. With the increasing number of people who are travelling in their RV's, it is important that Hay River include this growing segment in their marketing and promotional material. Hay River already has a campground and golf course featuring RV hook-ups, and more can be made of this to capture this market.

According to the 2006 Exit Survey, the South Slave Region attracts an estimated 13, 182 visitors annually (Government of Northwest Territories, 2007). The percentage of total regional traffic that currently benefits Hay River is unknown, however, in 2011, 963 people stopped at the Hay River Visitor Information Centre between May and September and it is a fair assumption that most of them were driving to (or through) the community. Tammy Buchanan reported that of those visitors, 800 identified as Canadian and 89 identified as American. As the first major town encountered by car travelers after a long drive, Hay River has a competitive advantage and therefore enormous potential for capturing these "rubber tire" visitors. In this way, motorists represent the most promising potential source of short-term tourism growth and the five travel narratives presented in subsequent sections reflect this fact.

Emerging opportunities I: Domestic Market & Travel Trends

Looking for vacation opportunities close to home

The slow growth of the Canadian economy in early 2011 has restored some confidence, however many Canadians remain worried about their personal financial situation. Consumer confidence has not yet returned to pre-recession levels and travel (overseas travel in particular) will likely take some time to regain its appeal. Moreover, as the Canadian dollar continues to hold its strength against the American dollar, travelling to the U.S becomes much more appealing and the domestic tourism industry must work hard to compete for these dollars. We can best do this by offering uniquely Northern experiences

that are at once ‘exotic’ for many southerners and authentically Canadian. This point is taken up again in the key findings and five-year plan.

The good news is that people are still looking for places for leisure travel albeit closer to home. The Canadian Tourism Commission (CTC) stated that in early 2011, 80.5% of Canadians surveyed said they were going to take a vacation that year (as noted in Tourism Research Update, 2011). Of those 80.5%, about 50% believed they would travel within Canada and 14% would travel to the United States. In addition, in the early part of 2011, three of Canada’s major airlines reported growth, which shows that despite higher airfares (i.e., higher fuel costs) Canadians may be traveling again (Tourism Research Update, 2011).

Using the internet for independent travel planning

Travel planning online and without the aid of a travel agent has become a standard practice for most travelers. The Canadian Tourism Research Institute (CTRI, 2011) found that an overwhelming 97% of buyers use the web as their primary travel resource and 77% of Canadian travelers planned to book at least a portion of their 2010/2011 winter vacation online. Modern technology and the use of online planning continue to grow, as travelers use mobile devices both before and during their travel.

Emerging opportunities II: Non-Domestic Markets & Travel Trends

American travelers may be starting to travel again

According to the Canadian Tourism Commission (CTC), overnight non-automobile travel from the United States to Canada increased by 4.4% in 2010 and overnight travel increased by 0.7% in 2011 (as noted in Tourism Research Update, 2011). Additionally, the CTC found that 59% of Americans in 2012 said they were going to take a vacation – up 3% from 2010. Despite this good news, the CTC also explained that US consumer confidence went down in March 2011, meaning that they have less disposable income and are therefore more likely to travel within their own country. Also, higher gas prices and the cost of flights to Canada will likely have a negative impact on the number of Americans travelling to NWT. In 2010/2011, 6% of leisure visitors to the NWT were from the US (Tourism Research Update, 2011).

Some Japanese travelers are moving again

Despite the natural disasters, the CTC stated that Japan is recovering and the number of Japanese overnight visits to NWT has increased by 18% (as noted in Tourism Research Update, 2011). Overall, Japanese visitors represent a large portion of aurora viewing tourists. In 2010/2011, 13% of NWT’s leisure visitors were Japanese.

The community view: What we heard from members of the Hay River community

Conversations

Alongside market data and exit surveys, it is important to consider the views of those who live in Hay River. Often those who live in a town, whether they are directly connected to the development of tourism or not, have strong and well-founded views that can help shape a successful vision of tourism. Our analysis of interviews and focus groups with members of the Hay River community revealed the following 5 major points. These points are revisited in the key findings sections as well as the recommendations provided in the five-year plan.

1) Develop the water- focus on lakes, waterfalls and rivers

The need to further develop water-related activities was a major point in many of the discussions. Participants felt Hay River has much potential as a result of its location on the river and Great Slave Lake. Existing features such as great fishing on the lake, Alexander Falls, the beach, canoeing and kayaking and the NTCL synchro-lift were all identified as major selling points for potential visitors.

Boat tours, cultural walking tours, and fishing tours are already taking place in Hay River, but these are typically occurring on a small scale insofar as a tourist would need to search for a phone number while in town and try to set up a tour. Although this approach may be adequate for tourists who are already in Hay River, participants felt it missed potential visitors who may be in the Territory and who are looking for water related activities.

Many participants described a lack of consistency regarding the provision of these water-related activities and felt that they needed to be better promoted and more organized to expand their appeal. Examples of better organization included the development of a website (for example, “Alexander Falls Tours”) that clearly advertises the Falls and gives directions for how to get to the site. Additionally, it needs to be made clear when the tours are occurring. For example “tours of up to 8 people will be held from Thursday-Sunday from June-October and leave every hour on the hour from 9 am- 5pm.” Participants had many suggestions in this regard and described a need for a much higher level of organization in order to draw tourists to these types of attractions. Additional reflections on coordinating activities and better organization the current tourism offerings are provided in the key finding and in the recommendations throughout the five year plan.

2) Marina Development

In addition to developing the waterfront and water-related tourism activities, one of the major points that came up throughout the discussions with participants was a need to develop a marina. It was noted that it is currently very difficult to get in and out of the water and that a new boat launch should be installed. In addition to the marina,

participants suggested official drop off points and parking lots to help both locals and tourists. Participants also noted that a marina was key to capturing the boaters from Yellowknife. Additionally, having a floatplane dock was mentioned, as this would allow another entry point for visitors to Hay River. In order for the marina development to be successful, participants explained that it should be developed as a collaborative effort with the First Nations community.

3) Community Buy-in

During the focus groups and interviews, many participants expressed a concern regarding the need to build community buy-in in terms of support for tourism. Although the Trade and Tourism Advisory Committee and some other members of the community were seen as understanding the *value* of tourism, it was noted that this sentiment might not be shared throughout the entire town. In order to facilitate this support for tourism, participants suggested hosting a town hall meeting to which community members could be invited and shown the potential benefits of tourism in Hay River. In addition to showing the potential benefits, this town hall meeting could also address issues like “how to be a good host” which would encourage members of the community to be welcoming and informed. Participants felt community members could do more to share what they know about life in Hay River with tourists. However, some participants explained that it is difficult to get community members to buy-in to tourism as it has not been successful in the past, and in order to become successful, money and effort will need to be invested.

4) Packaging Products

Participants argued Hay River has so much to offer tourists, but the presentation of these tourism products in the form of packages is essential in order to better share these offerings with tourists. There were a number of suggestions made by participants as to what they thought these packages could look like. Ideas for packages were anchored around the appeal of Buffalo Airways, the aurora borealis, fishing, and cultural experiences. Many participants felt that packaging existing tourism products together would allow visitors to spend more than one day in the community. Other participants explained that an official staging area or meeting place for all tourism operators should be developed. This would be a building where all the operators have kiosks and transportation to their activity.

Importantly, it was noted that the recent FAM tours from Yellowknife proved people want to come to Hay River, but tourism packages still need to be created to capture the largest potential audience. Participants explained that since the bus route no longer extends to Hay River, rubber tire traffic and passengers arriving by air should be the main areas of focus for marketing these products.

5) Putting it all together: Taking tourism seriously

The last major point taken from conversations with members of the Hay River community was that while Hay River has the physical pieces to become a viable tourist destination (outdoor attractions, cultural experiences, hotel and campground facilities), there remains a need to pull everything together to make it happen. It was noted that while there are many chances to talk about ideas for tourism development, it is time to put them into action. Participants explained that there was no real path in terms of how to move forward, even on relatively simple and easy ideas (e.g., having the Visitor Information Centre partner with the airport in order to provide information to visitors arriving in the winter months or encouraging outfitters to move beyond catering to tourists as just a hobby and not a real business). This point is taken up again in many places below, most directly in our primary recommendation that the town hire a Tourism Coordinator.

Online survey

The survey was conducted online and was designed to garner feedback from community members in terms of how tourism has affected the town of Hay River and how the town should move forward with its tourism offerings. In the two days that the survey was live on the community's Facebook page, 13 community members participated. Survey participants communicated the need for downtown beautification, more marketing and advertising materials to get the word out about Hay River, and a desire to focus efforts on water-related developments. Importantly, and as is reinforced throughout this document, survey participants also noted that having someone to put into action all of the great ideas put forward by members of the Hay River community would be very beneficial for tourism.

Town beautification

A reoccurring theme from the survey was that the downtown core needs to be updated and improved to become more appealing for locals and tourists. Some participants noted that putting in more green space would be both visually appealing and functional during Hay Days and other community events. Another point made about the downtown is that signage should be improved to show visitors the town's highlights and tourism offerings.

Improved marketing and advertising

The need to better market and advertise existing tourism offerings in town was brought up repeatedly times by participants. Related to this, some participants suggested local operators should develop their knowledge regarding how to successfully promote their businesses.

Focus on water-related activities

Many survey participants brought up water-related tourism activities. Points included developing a marina, promoting waterfalls and rivers, canoeing, boating and packaging these types of activities into a larger tourism product. Also, a need for having a better place to launch boats was identified. These survey findings were similar to the data collected throughout the interviews and focus groups.

What does this mean for Hay River? Key findings based on market analysis

Our analysis of the data can be summarised into 4 key findings. These findings also form the basis of the step-by-step action plans outlined in the 5-year strategic plan presented below.

Key Finding #1:

The most important target market in the short term is the “rubber tire”, Canadian tourist.

Although non-domestic travelers are not an insignificant component of NWT tourists, unforeseen disasters, economic conditions and a general feeling of uncertainty will continue to shape a resistance to long-distance travel for most. For this reason, Hay River should direct its focus in the next 5 years on attracting Canadian visitors. Further, while Japanese visitors represent 13% of leisure travelers to the NWT (Tourism Research Update, 2011), Hay River is not yet ready to offer the products and services most of these travelers expect. Overseas markets value well-established tourism operators/businesses, quality products including food, accommodation, transportation, scheduling and guides. Hay River currently has many of these aforementioned pieces in place, but they are not yet organized in a way that will be a major attraction for overseas visitors. As a result, marketing efforts should be focused more locally. In particular, car travelers, visitors to Yellowknife and other areas, VFR (visiting friends and relatives) travelers, and meetings and conventions travelers represent the best potential return on investment for Hay River. The five tourist narratives presented in a subsequent section reflect this focus.

Key Finding #2:

On-line booking through an up-to-date, secure, accessible, and easy to navigate website is essential for helping travellers find and book their own accommodations, experiences and activities.

Although Hay River currently has a town website that contains ‘Visitors’ link and which provides a clear overview of what is available for visitors, it does not have the immediate appeal that tourists are seeking. The site does provide links to accommodation options and a few tourism activities, but overall, it needs to be improved to provide more information

about tours that are available and other activities that would appeal to car travellers. It is important to note that operators and other business owners do not need to hire web developers or spend a lot of money creating websites. There are easy to manage templates and secure booking programs for offering these options online and domain names have become quite affordable in recent years.

Key Finding #3:

Most tourists to the north are relatively wealthy and well-educated. They are also interested in cultural experiences and packages that make travel hassle-free. Hay River has enormous cultural and natural resources, which can be carefully built on and coordinated to provide an anchor to hold tourists a little longer.

Hay River has the cultural and natural resources in place to become a major draw for tourists. Incorporating cultural experiences like a visit to the Dene Cultural Institute (DCI) or a 'walk in my moccasins' tour along the river into a larger tourism package will offer visitors the opportunity to experience the natural and cultural history of Hay River. Currently, the DCI is doing a wonderful job showcasing the Dene culture; however, getting visitors to the reserve side of town was identified as a challenge. As noted earlier, creating organized, accessible tours that package experiences are key to attracting these 'wealthy and wise' visitors. Having open communication between tourism operators and all community members will help foster the community support for tourism as well as the organization of packages that will appeal to the kinds of tourists Hay River can count on attracting.

Key Finding #4:

Outside of business and convention travel, Hay River is not well enough developed to be an international destination in its own right but it can be an indispensable component of a larger Northern experience.

The 1999 report (The North Group) points out that Hay River lacked the kinds of amenities, attributes and attractions that would need to be in place to support a coordinated effort to attract travelers from overseas. Our analysis reveals that this is still the case. Indeed, due to the relatively small number of leisure travelers who come to Hay River as well as its current tourism offerings, it is not well enough developed to be a destination in its own right, especially for international travelers. However, with the right strategies, Hay River can become an indispensable component of a larger, Northern trip experience. Attracting visitors to the area in general is a complex and expensive task and one best left, at least in the short term, to those who market and develop tourism for NWT as a whole. The biggest opportunity for Hay River exists in attracting visitors who are already arriving in the Northwest Territories. Geographically, Hay River should capitalize on travelers coming north on the Mackenzie Highway through northern Alberta, western Canada, and the

northwest United States. As noted above, day trippers and road travelers who can stop on their way to another community are a valuable and reachable group. Tapping into the marketing activities and putting Hay River on the 'map' in terms of getting attention at the Territorial government level is essential for building on this opportunity.

The future of tourism in Hay River

After assessing the tourism market data, conducting a brief site visit, and speaking with members of the Hay River community, it is clear that the first step is to build on the strengths already present in Hay River. In the short term, Hay River will benefit by making the most of its proximity to bigger attractions like Yellowknife, packaging offerings already in existence in the community to keep day visitors in town longer, and by creating partnerships with other travel destinations to attract Canadians who are considering a trip to the region. The longer term goal can be to put Hay River on the NWT 'map' in terms of making the community a must-stop destination in the North. If the community is willing and able to first put some major components in place (such as a Tourism Coordinator), it will be well prepared to realize the following vision:

The vision

To build on the considerable strengths of Hay River, particularly its position as a travel hub of the north, to: (1) attract more rubber tire tourists and to keep them in the community for a longer period of time and (2) develop the capacity (i.e., human resources, partnerships, reputation) to move to the next level and become an indispensable component of travel to the Canadian North.

Realizing the vision: 2012 – 2017 [Five year strategic tourism plan]

With the vision in place, the Hay River community can start to work through the following strategic plan for tourism development. It should be noted that some of the points listed below echo recommendations made in the last tourism development plan (The North Group, 1999) but the general aim of this 2012 plan is to provide more modest steps designed to build a platform for future tourism development. To this end, year one is presented as a year for building a solid foundation for tourism development in Hay River, and the focus is most on getting a tourism coordinator in place to take charge of this process. Years two, three and four are combined to reflect the broader point that there is one major goal for this period: coordinating, collaborating and developing to enhance to the products already on offer and to incrementally and carefully expand in new areas. A series of priorities and related steps is offered for this three-year period and the numbered

list suggests a logical order for tackling them, but it is up to the community to decide if this list is in the right order and to consider which actions should be undertaken and when. Year five presents an outline of strategies for measuring the impacts of the actions taken up to that point.

Year one: Building a solid foundation

After an assessment of existing tourism development infrastructure in Hay River, it is clear that the promotional materials, website and existing package deals could provide a sound starting point for future growth. Because of this solid foundation, short term and medium-term attention can be put towards better coordinating, organizing and especially marketing and packaging those experiences and attractions already in place. However, the first year should be dedicated to getting the right people, tools and relationships in place for future growth.

Goals for year one:

To put in place the individuals (i.e., a tourism coordinator) and tools (i.e., a secure, up-to-date and accessible website), and relationships (i.e., coordination between Hay River tourism and Northwest Territories tourism) to foster a measured and coordinated approach to building the tourism appeal.

Step 1: Hire a full-time Tourism Coordinator (perhaps combined with an economic development officer position). As recommended in the 1999 plan (The North Group, 1999), a tourism coordinator is an essential first step towards enhancing the tourism offerings already present in Hay River and for moving the community towards future growth. This person would be responsible for coordinating tourism activities, developing a more integrated and active website (see step 2) and would ensure that tourism-related decisions and ideas don't get lost. While the Trade and Tourism Advisory Committee should ultimately be responsible for designing this position, the job description might include:

- a. Coordinate and develop all marketing materials
- b. Gain an assessment of operator needs
- c. Work with tourism operators to develop marketing plans and to broaden the partnerships beyond just tourism operators to include other members of the community who can also play a role in tourism development in a small community
- d. Create partnerships with other communities to combine activities and experiences that will draw tourists in
- e. Act as a consistent, visible point of contact in the community for tourism operators, community members and visitors
- f. Apply for funding

- g. Develop sets of indicators to measure the impact of tactics and strategies designed to increase tourism (see years four and five)
- h. Reach out to the members of the community regularly through local and social media to share ideas and generate a community-wide conversation about tourism in Hay River

In addition, the North Group also set out number of options for supporting this position financially (1999, p. 42). These strategies should be re-visited.

Step 2: Develop the website to advertise package deals as well as consistent, reliable, and up-to-date information about tourism opportunities in the community. It should also be more user-friendly and might include the following aspects:

- a. A stand-alone tourism website that provides one clear, exciting page that highlights what is going on in the community and offers packages to potential visitors
- b. These between pages and offerings need to be well organized, highlighting available packages and displaying price information clearly
- c. Include tour operators are included on the website and then work towards giving potential visitors the ability to book their activities/packages online
- d. Lastly, and potentially most importantly, tourism operators should create and maintain their own websites, which can be linked to the town website and the tourism website

Step 3: Coordinate with NWT tourism to pursue funding opportunities and to take better advantage of the Territory's efforts to build the region's brand and market reach.

Step 4: Pursue the consistently expressed idea of building a marina in the community and/or developing a tourism theme that captures the role of water and water-based activities in the life of Hay River.

- Promote the waterfront/fisherman's wharf
- Install a boat launch
- Promote and develop festivals to take place at waterfront
- Include clear signage directing visitors to waterfront attractions
- Create a 'home-base' or meeting point for all tourism operators

Years two, three and four: Coordinating, collaborating and developing

Goals for years two, three and four:

To use the networks and trust built in the community by the Tourism Coordinator to enhance partnerships, develop packages designed to move the community from a day-tripper destination to a weekend or 2-3 day destination.

As noted above, Hay River is not likely to become, at least in the short term, a destination on its own for most travelers. To this end, the Tourism Coordinator must work with other coordinators and marketers to ensure Hay River is part of the tourists' Northern experience. Aurora viewing, adventure tourism packages, and aboriginal tourism experiences have the potential to be key anchors in weekend or three day travel experiences. Recent NWT marketing materials suggest that this is a welcome approach. For instance, the 2012/2013 marketing plan puts forward the following branding goal: *To be positioned as the world's #1 Aurora viewing destination* and the report describes Hay River, Yellowknife and Inuvik as the communities "most involved" with this product.

Product development and marketing priorities for years two, three and four

Priority #1: Build on the success and exposure of Buffalo Air

Buffalo Airways has become an international success story as a result of the hit television show *Ice Pilots*. Currently, a major opportunity exists to capture visitors who are already in Yellowknife and fly them to Hay River on one of Buffalo Joes' vintage aircrafts. Although some travelers are already embarking upon the flight from Yellowknife to Hay River on Buffalo Air, most air passengers arrive in Hay River, go directly to their hotel, and fly out early the next morning back to Yellowknife. This represents a missed opportunity for the town as more effort can be made to provide these flight experiences to additional visitors.

In order to capitalize on the success of the *Ice Pilots* television show and subsequent visitors to Hay River via Buffalo Airways, the following steps should be taken:

Step 1: Increase Buffalo Air presence at the airport through improved signage

Step 2: Include some references to *Ice Pilots* in or around the Buffalo Air counter

Step 3: Create packages that feature a Buffalo Air flight in 2-3 night stay in Hay River

Step 4: Have an area for photo opportunities in front or onboard a Buffalo aircraft

Step 5: Provide shuttles to hotels for Buffalo passengers

Step 6: Develop/promote Buffalo Air tourism package on Hay River Tourism website

Step 7: Develop/promote Buffalo Air tourism package on the Buffalo Air website

Step 8: Develop/promote Buffalo Air tourism packages in Yellowknife airport and in NWT promotional materials

Priority #2: Enhance the role of the airport as a welcoming place for visitors

The Hay River airport must include more information for arriving passengers, especially regarding what is available in town. Currently there is very little information that is readily available for visitors. For those arriving into town by air, the airport represents the first point of contact. As a result, information about tourism operators, hotels, restaurants should be clearly displayed for arriving passengers. To improve the arrival experience of air travelers to Hay River, consider the following steps:

Step 1: Create wall panels in the airport that contains everything an arriving passenger would need to know (where to go, how to get there, things to see and do, where to stay, where to eat, etc.)

Step 2: Install an electronic touch screen that gives arriving passengers an interactive way to find out information about tourism products and services in town (and which can easily and quickly be up-dated as information about the community changes)

Step 3: Have well-trained volunteers (e.g., someone from the Seniors' Society) stationed at the airport who can act as ambassadors for the town and its tourism offerings

Priority #3: Improve the Visitors Information Centre

Currently, the Visitor Information Centre is only open in the summer. This is, of course, very valuable for tourists arriving in the summer months, but leaves many missed opportunities to improve and expand the stay of those travelling to Hay River in the winter. In order to continue to provide helpful information to tourists arriving in the winter (likely by air), incorporate a visitor information booth at the airport. Members of the Seniors' Society (or other community members) may be interested in working or volunteering at the airport to help guide passengers to Hay River's tourism offerings.

Priority #4: Continue to develop and market tourism packages

One of the most exciting developments in tourism in Hay River was shared by Tammy Buchanan in February, 2012. The 'draft' tourism package was developed for the Edmonton

Boat Show this spring and is evidence that Hay River is on the right track in terms of for understanding the need to packaging tourism products together. The packages offered in this draft are well presented and very interesting and are exactly the kind of promotional materials that should be developed regularly. A Tourism Coordinator should have the responsibility for coordinating with operators and business owners to put these packages together.

Sample packages

The following ideas could be used to supplement the existing packages or as stand-alone packages.

Table 4: Sample packages for Hay River tourists

Lights, Camera, Action!	Ice Pilots package (2 days)	One, Two, Three, Fore!
<ul style="list-style-type: none"> - Return Airfare from Yellowknife to Hay River on Buffalo Airways -Two nights' accommodation at a choice of hotels (with airport transfers) -Breakfast included Activities (choice of 2 activities) -30 minute photography lesson with professional photographer Adam Hill -Provide guests with Hay River coffee/hot chocolate thermos that they get to keep, fill them up with their choice of hot beverage -Shuttle to forest area outside of town, snowshoe into forest, set up cameras/tripods, take photos of aurora borealis (Adam will lead tour and assist with any photography questions) -Exchange contact information so photos can be shared with fellow tourists -Shuttle back to hotel 	<ul style="list-style-type: none"> -Meet legendary Buffalo Joe, have photo taken with him -Get a 1 hour tour of Buffalo Hangars and aircraft (a behind the scenes look at how the show was created) -Take a flight on Buffalo Air to Hay River -Check into choice of partnering hotel (airport transfer provided) -Breakfast included -Snowmobile/ATV tour of Hay River depending on season -Return flight to Yellowknife on Buffalo Air <p><i>**This package can be made available for those coming from Yellowknife, or those who are already in Hay River who are heading to Yellowknife.</i></p>	<ul style="list-style-type: none"> -Walk a mile in My Moccasins Tour -Fish and Cruise Great Slave Lake -Half Day Paddle on the Hay River -A round of golf at the Hay River Golf Club <p><i>**This package would be the deluxe package for those looking to get the most out of their trip to Hay River.</i></p>
<i>This could then be coupled with another existing activity that was presented in the recent advertisement.</i>	<i>This could then be coupled with another existing tourism activity mentioned in the recent Hay River brochure.</i>	<i>This tour could be marketed for R.V travelers, car travelers, or those arriving by air.</i>

Priority #5: Decide on a theme or brand (and be consistent)

While theming and/or branding isn't a silver bullet for developing a successful tourism attraction or destination, it can go a long way in terms of helping a small community coordinate its tourism efforts and create a sense of place. The challenge, however, is to find a theme that most if not all of the major players in tourism and the community can agree upon and to stick with it long enough to give it a chance to work. The 1999 tourism plan appears to recommend a theme for the community "*worth the extra mile*". The Hay River website refers to the community as "*the hub of the north*" and the promotional materials recently developed for the 2012 Edmonton Boat Show (see priority 4) refers to Hay River as "*all season adventures at an 'Arctic Port'*". While it isn't within the purview of this plan to suggest a theme or brand that the community of Hay River can land on in terms of making its mark in the tourism development, it must be said that a coordinated effort to create an agreed upon brand and/or theme is a must in this period of beginning to expand the appeal and exposure of Hay River.

Priority #6: Improve methods of counting visitors to the community

Currently, visitor statistics for the town are kept by the Visitor Information Centre, this is a good start. However, this accounts only for the road travelers who chose to stop at the Centre. Another issue regarding the visitor statistics is that the Visitor Information Centre is only open in the summer. In the winter months, visitors are encouraged to contact the town hall for information. These are common problems for most small communities but getting a sense of who is coming to your community is really the only way to be sure your marketing efforts are working.

Step one: Consider asking tourism operators to create a visitor sign-in book. If a booth is set up at the airport to connect with winter tourists, have a sign in book at that location as well. These books can be collected at the end of every year and signatories can be compared with, and added to, the information kept by the Visitor Information Centre to create a fuller picture of visitation.

Step two: Once this counting process is underway, it should be undertaken yearly as it forms the basis for the evaluation and assessments of tourism development suggested in Year Five.

Priority #7: Expand relations with (and take advantage of) Northwest Territories Tourism

In the 1999 plan (The North Group, 1999), a number of recommendations were made to strengthen the linkages with NWT Tourism including representation of the Hay River community on the NWT Arctic Tourism Board (p. 69). Building on these linkages is an essential component to expanding Hay River's exposure to tourism markets. In addition, a dependable, stable relationship with NWT Tourism ensures Hay River is in the minds (and on the map) of those who are working to market the North to potential tourists.

The site visit undertaken in preparation for this plan in January 2012 coincided with a day of tourism product development training, which was sponsored by the Northwest Territories Department of Industry, Tourism and Investment. This free workshop and the meet-and-greet that followed were designed to help tourism operators in the Great Slave Region improve the marketing of their products. This is just one example of the many resources and opportunities available from this department and the key to effectively accessing these resources is having a tourism coordinator (see year one) who can work closely with this department.

Priority #8: Expand relations with Katl'odeeche First Nation

In order for tourism to be developed successfully in Hay River, it is important to include all major stakeholders. Including and working with the Katl'odeeche First Nation will allow for a more unified and organized tourism product. Also, working together will allow packages to be developed that feature the best Hay River has to offer.

Step 1: Include a member or members from the Katl'odeeche First Nation at every Trade and Tourism Advisory Committee meeting.

Step 2: Develop and advertise packages that contain both cultural and other types of activities to offer visitors a more enriched visit to Hay River.

Step 3: Have a van (12-15 passenger) driven by a First Nation person that can shuttle visitors from their hotels to the Dene Cultural Institute and back. This will likely bring many more tourists to the Reserve as tourists are seeking organized transportation for entering and accessing the reserve.

Priority #9: Build community support

Step 1: Conduct regular town hall meetings (e.g., at the beginning of every summer and winter tourism ‘season’) with as many members of the community as possible. The first meeting might be held to introduce the Tourism Coordinator to the community and to start a conversation about the role of tourism in the Hay River. Encourage members of the community who may not be directly involved with tourism to share their thoughts and concerns about tourism in the community and take their views seriously. Involve concerned and engaged citizens in the Trade and Tourism Advisory Committee. Explain that by welcoming guests and being knowledgeable about what is going on in town will increase the likelihood of positive visitor experiences and repeat business.

Step 2: Conduct a hospitality course at the college. Creating a mindset for hospitality and tourism will help provide motivation to keep members of the community on-board and interested in tourism development.

Year Five: Assessing development and setting your sights even higher

A good tourism planner never stops assessing the situation and aiming to make improvements. Consider developing a yearly review of what’s happening in tourism development in the community; ideally, this is part of the mandate for the Tourism Coordinator. Developing plans, goals and objectives for tourism growth and development in a community only works if there are also ways to measure whether these plans, goals and objectives have been reached.

In addition to monitoring these types of indicators, there needs to be someone who is responsible for the overall implementation and evaluation of these assessments. The Tourism Coordinator is the most obvious choice for this role.

Goal for year five:

To build on the (by now regular) process of measuring the visitation rates of tourists and move towards working with those who operate tourism businesses and other activities to develop a way to assess progress and make improvements as tourism begins to take hold in the community.

Priority #1: To better measure the role tourism is playing in Hay River, it is important for those who are concerned with tourism development in the community to agree on monitoring indicators. Monitoring indicators provide a way to measure and evaluate the success of tourism developments. The indicators will show the extent to which the objectives of every activity have been achieved. Monitoring indicators should be explicit, pertinent and objectively verifiable. There are many indicators that can be used to measure the success of tourism development. Some common indicators used in measuring tourism success are:

- Degree of improved infrastructure and development
- Visitor volume (i.e., percentage of repeat visitors, number of overnight visitors, number of day trippers)
- Daily expenditures on various sectors (i.e., accommodation, transport, attractions, shopping, food and beverage)
- Community sentiment towards tourism

Priority #2: Check in with the community. As visitation to Hay River continues to grow, create a process for asking whether this is the *kind* of tourism development that is in line with the community's vision of itself. It is never too early to check in with the members of the community to see how they are feeling about the image of the town and the impacts that tourism is having on their community.

[With this priority in mind, we have provided the community of Hay River with a copy of a community-based tourism-planning manual (Reid, Mair, George & Taylor, 2001), which community members might consider utilizing as tourism begins to grow. The manual was developed by researchers at the University of Guelph in 2001 and is designed as a user-friendly process to be used by all members of a community interested in creating a community-supported tourism plan.]

Meet the tourists: Five travel narratives

Evaluating the demographic information as well as marketing materials for the NWT has allowed for the creation of five narratives, which describe the experiences of representative travelers to Hay River. As is noted throughout this document, Hay River is best advised to work to locate the community within the broader context of travel to NWT. The specific, demographic profiles are based on information provided in the NWT 2012/2013 marketing plan. As is noted in the NWT 2012/2013 marketing plan:

Until the new research has been conducted our marketing efforts will focus on key characteristics/criteria including household income, travel motivators, interest in the outdoors, and individuals who are willing to forgo some of the luxuries (but not quality) in exchange for an authentic experience. Our main objective is to target the people who have a keen interest in the products we have to offer and have the economic means and time to afford the trip. (p. 28)

(1) “Jack” The adventure tourist

Jack has driven up to Hay River with his three buddies from Vancouver. As this is their third visit to the area, it is becoming a bit of a tradition with the foursome. Jack is a forty-something professional with two university degrees and he makes an upper-middle class income. He and his buddies are looking for a quality wilderness experience – a fishing or hunting tour, two or three nights at a lodge or fishing camp and they are not afraid to spend a couple of thousand dollars on the trip if they are well provided for.

When he and his buddies first talked about a fishing and hunting trip to the North, they asked around for word-of-mouth recommendations and then went on the internet to explore their opportunities and book the outfitter and accommodations. They wanted someone to organize every aspect of their trip including equipment rentals and/or purchases and licenses.

When he emailed the Visitor Information Centre to ask for recommendations, Jack was encouraged to book a visit to Buffalo Air, which included photo opportunities and a short flight in a vintage aircraft.

While they have come to the area in the fall for the last three years, they are thinking of increasing the challenge next year by coming in the winter and booking an ice fishing trip and to try out snowmobiling and dogsledding.

Demographic Profile

- Incomes up to high level professional
- Looking for a wilderness challenge
- Incomes of anglers are slightly higher than \$90,000
- Spend an estimated \$1,544 per person and stay for approximately 14 nights
- Just over 50% are Canadian, 21% are American, and 27% are from other countries
- Just over 50% arrive by air and the rest drive
- Over 50% are repeat visitors
- 67% went wilderness camping, 59% stayed in commercial lodging
- Spend under 12 months planning their trip and are influenced by word-of-mouth (40%), Internet (29%) and the Explorers' Guide (16%)
- Canadian anglers are mostly from Alberta, Ontario, British Columbia and Saskatchewan
- 90% of anglers are men, with 2/3 repeat visitors
- The majority are between the ages of 41 and 70

(2) “Bill & Janet” The road tourists

Bill and Janet are newly retired ‘empty-nesters’ from Southern Alberta who have always wanted to drive to see the Canadian North. They rented an RV for two weeks for their summer adventure. This gives them some independence but also allows them to be sure their accommodations are clean and safe.

Janet has just taken up photography and was enchanted by the pictures of Alexandra Falls she saw on-line and wanted to spend time

Demographic Profile

- Mainly in the 55 plus age group with average to high incomes
- Many are retired empty nesters, and most travel by road (88%)
- A fairly even division

in that area. When they were booking the trip, Janet looked on-line to find and book a well-recommended campground with electrical hookup. She booked a campsite at the Hay River Campground for three nights so she and Bill could experience the cultural life of the rural north before heading on to Yellowknife. Bill was concerned that they be able to take part in some walking and hiking activities and was attracted by the various nature trails in the area he saw on-line. While in the area, Janet also wanted to visit the Yamoza K'ue Society (Dene Cultural Institute) to learn about the five Dene Nations of the Northwest Territories and make a pair of moccasins with an elder that she can take home and show her friends and family. She was also excited to learn about the K'atl'odeeche First Nation Reserve through her searches online and wants to visit the area to learn about the history and culture of the Dene.

between male and female

- Canadians comprise 72%, US 17%, other 11%
- Air travelers spend on average \$4,720 per party of 2.58
- Road travelers spend on average \$3,615 per party of 2.58
- Generally motivated by nature and culture experiences
- Concerned about safety and hygiene
- Value independent travel
- Want soft outdoor adventure experiences

(3) "Gloria" The business tourist

Gloria flew to Hay River for a three-day convention. Having never travelled outside of her native Edmonton, she was excited by the chance to spend a bit of time exploring the area during her stay and booked an extra day in the community. She has one university degree, is a senior manager with a relatively high annual income and is married with two children.

Most of Gloria's food, accommodations and recreation needs (including a game of golf) have already been met by those convention planners who used the NWT Meeting and Convention Planner to organize the event. However, she is keen to make the most of her extra day in Hay River and to experience life in the north.

She didn't have time to check out the community online and so is relying on information regarding what to do Hay River upon arrival. She finds an information desk at the Hay River airport when she arrives and spends some time speaking with a very knowledgeable volunteer travel representative who suggests some short hikes she can do in the area as well as the Hay River Museum Society Heritage Centre. She is also excited to learn from the visitor's guide that Hay River Days are on while she is in town and the volunteer encourages

Demographic Profile

- 60 % are between the ages of 40 and 59
- 76% are male and 23% are female
- Party size is usually 1 – 2 people and they usually travel by air
- 69% spent 1 to 3 days in the NWT, 9.5% spent 4 – 7 days
- 44% of travelers participated in a tourism activity
- Majority are university educated, in professional, managerial or trades-based occupations
- Average annual income of \$70,000+
- Majority of business travelers are from Alberta,

her to take part in the arts and cultural festival and to experience the authentic Hay River spirit.

Ontario and British Columbia

(4) “The Jones Family” The family-oriented tourists

The Jones family, (Mike and Wendy and their 2 children aged 7 and 9) who reside in nearby Fort Smith are packed into their minivan and heading for Hay River to visit Wendy’s sister. Mike has recently discovered Hay River’s new and improved tourism website and was able to easily create a full weekend itinerary to keep everyone happy and occupied. As a young family, the Jones’ are looking for activities to keep the kids active and engaged while being value-conscious.

They will be staying at the Hay River Campground as a cheaper alternative to a hotel and this will also give the kids the opportunity to spend some time at the beach. When a change of scenery is required, they head to the nearby Aquatic Centre and enjoy the pool and waterslide. Other activities include a nature walk to Alexander Falls followed by a trip to the fisherman’s wharf where they eat the catch of the day and watch boats come and go. To wrap up a busy weekend, Mike had discovered that Buffalo Air was offering tours of their planes at the airport. Giving the kids (and larger kid, Mike) the opportunity to sit in the cockpit and have their photo taken with the plane is definite trip highlight.

Demographic profile

- The visiting friends and relatives traveler (or VFR) is always an overlooked demographic.
- Seek out local markets and family restaurants
- Likely to access recreation centres for kids’ activities
- Look for outdoor spaces, parks, walking trails etc., as well as water-based activities
- Family oriented activities, camping, canoeing
- Economical, price sensitive
- Typically residents of NWT, northern Alberta, BC, Saskatchewan

(5) “Aiko & Jin” The international ‘aurora’ tourists

Aiko and Jin are recently married and are travelling to the Northwest Territories to view the aurora borealis and to experience a Canadian winter in the north. So far, the most exciting part of their visit was the flight from Yellowknife to Hay River on Buffalo Air.

Aiko and Jin are highly paid professionals with relatively high amounts of disposable incomes. They are among the first of their peer group to travel since the devastating earth quake of 2011 and went online to find highly organized events that would give them a sense of

Demographic Profile

- Aurora visitors comprise the largest portion of overseas visitors to the Territory.
- The majority of these visitors are from Japan, with a small number from Korea and China.
- Seeking 2-3 day package in Hay River

life in the Canadian north but would still give them comfort including Japanese translation and quality accommodations.

When reading about Hay River online, Jin remembered hearing about dogsledding from one of his work colleagues who had been to the Northwest Territories in 2008. Jin was interested in giving that a try. He made a booking with an operator who also promised a lunch of 'authentic' northern cuisine and a chance to learn how more about dogsledding.

When Aiko was online looking for the northern get-away of her dreams, she was attracted by a package experience offered in Hay River called 'Lights, Camera, Action!' where she and Jin could learn about photography from Adam Hill, snowshoe out to see the lights and take pictures to bring home. She was charmed by the thought of having a hot chocolate with her new husband under the northern lights and made the booking for the trip as a surprise. Having a volunteer on hand who spoke Japanese helped the couple make the most of their adventure.

- high levels of disposable income
- Looking for a highly organized, guided tour
- Want to experience local customs, food etc.
- Seeking souvenirs, (involved in creating their own arts and crafts)
- Come to view the Aurora with dogsledding as their second most popular activity

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Appendix A: One-on-one Interview guide

Interview guide

1. What is your role in tourism in Hay River? (how long involved, nature of involvement)
2. Has that role changed over time?
3. In your view, what is the process of tourism development in Hay River? (has it been useful? Efficient? Healthy? Closed?)
4. What do you think needs to change in terms of tourism development in Hay River?
5. What do you think needs to stay the same?
6. What do you care most about protecting in this community?
7. If you could imagine tourism in this community in 10 years, what would you like to see? (20 years)
8. What do you think anyone concerned with tourism in Hay River should keep in mind?
9. Is there anything else you'd like to tell me about tourism in Hay River?

Appendix B: Focus Group Guide

1. How has tourism had an impact on you as a member of this community?
2. In your view, what is the process of tourism development in Hay River? (has it been useful? Efficient? Healthy? Closed?)
3. What do you think needs to change in terms of tourism development in Hay River?
4. What do you think needs to stay the same?
5. What do you care most about protecting in this community?
6. If you could imagine tourism in this community in 10 years, what would you like to see? (20 years)
7. What do you think anyone concerned with tourism in Hay River should keep in mind?
8. Is there anything else you'd like to tell me about tourism in Hay River?

Appendix C: Survey Monkey Questions (via Facebook)

How has tourism had an impact on you as a member of Hay River?

In your view, is enough being done to develop tourism in Hay River?

What do you think needs to change in terms of tourism development in Hay River?

What do you think needs to stay the same?

What do you care most about protecting in Hay River? (For example: Culture, Heritage, Environment)

If you could imagine tourism in this community in 10 years, what would you like to see? (20 years?)

What should be the primary focus of tourism be in Hay River?