

KLONDIKE HOUSEHOLD SURVEY

RESULTS

Prepared for

KLONDIKE DEVELOPMENT ORGANIZATION

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PREPARED BY

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SURVEY RESULTS

The total sample size was 133 households, covering 333 people, a very high 17.6% of the Klondike population. The average household size was 2.52. The sample was biased slightly to the younger age groups over the seniors compared to the general population, with an average age of 34.2. The average number of years spent living in the Klondike was 16.6 and 88% described themselves as year-round residents. The sample was generally representative of the community and, notwithstanding the voluntary nature of the survey, the results can be broadly extrapolated to represent the community at large.

HIGHLIGHTS

The full survey results can be found in the data tables in Appendix One. The data collected was retained online and is accessible for further analysis as required for future studies or development feasibilities.

Population Mobility

Fully 89% have relocated to the Klondike from elsewhere, and of these, most, 85%, came from the rest of Canada, with smaller portions from the Yukon, 10%, and abroad, 5%. 20% of households expect to leave the Klondike in the next five years and 41% are unsure. Of these, 33% are considering elsewhere in Yukon, 64% elsewhere in Canada and 3% moving abroad.

Seasonality

27% and 7% of households have increased the number of year-round and seasonal residents respectively in the last five years while only 12% and 3% have decreased those numbers. However, 25% and 7% of households expect the number of year-round and seasonal residents respectively to decrease in the next five years while only 8% and 4% expect to increase those numbers.

30% of households have changed their seasonality in the last five years. 38% of those increased their time in the Klondike, by an average of 10.5 weeks while 62% decreased their time, by an average of 9.4 weeks. The average change in time across the whole sample was a decrease, but of only 0.54 weeks, or 3.8 days. Nonetheless this still represents over 1% of the year and could be a drag on the community economy.

Existing households do not appear to be a viable source of population growth or seasonal expansion.

Population Drivers

Two factors have dominated motivation to relocate to the Klondike, Quality of Life, 70%, and Employment, 60%. Recreation was third at 25% followed by Family and Personal Relationships at 21% as the only other significant factor.

Increased seasonal time in the Klondike is lead by Employment, Family and Personal Relationships and Quality Life. Decreased seasonal time is driven by Climate, Education and Quality of Life.

Factors driving residents to consider leaving are lead by Employment but are very evenly split amongst many others that are narrowly behind with Health Services the lowest:

| | |
|-----------------------------------|-------|
| Employment | 55.8% |
| Cost of Living | 48.1% |
| Recreation | 44.2% |
| Family and Personal Relationships | 44.2% |
| Education | 42.3% |
| Quality of Life | 42.3% |
| Climate | 42.3% |
| Housing | 36.5% |
| Health Services | 25.0% |

Household Spending

The average proportion of household expenses spent outside the Klondike is 14.3% with the most prevalent being 5-10%. The mean average annual household expenditure outside the Klondike is \$9,422. This implies a mean annual household expenditure of \$65,888.

(Note: 2005 average after-tax household income was \$53,331 (2006 Census), which, indexed to earnings growth, projects a 2010 household income of \$61,832. Expenditure amounts are therefore broadly consistent with known incomes but may imply the sample is slightly biased to higher income households.)

| | | |
|---|---------------|-----|
| Destination of expenditures outside the Klondike: | Whitehorse | 45% |
| | Outside Yukon | 32% |
| | Online | 23% |

89% need and/or use products or services they cannot find in the Klondike and 82% do deliberately search out Klondike businesses. Local availability, 91%, is the lead driver of outside spending, followed by price, 79%, selection, 64%, and quality, 41%.

87% of households are prepared to pay more to buy locally. The average premium tolerance is 10.4% and the most prevalent is 10% (41%).

56% of households either do, or would, take part in purchasing co-operatives with other residents. A total of 39 specific comments were made on purchasing cooperatives, mostly related to product demands of which 90% were for food, specifically organic food, 39%, bulk food, 39% and local agriculture, 13%. Concerns were expressed with regard to quality, timeliness, variety and the impact on local businesses.

Travel leads spending outside of the Klondike. Excluding travel spending over which the community has little control, outside spending is dominated by Groceries, 26%, and Clothing, 14%, followed by Housewares and Personal Care items. Annual outside spending on Groceries is estimated at \$1,972 per household or \$1,472,774 across the community and on Clothing is estimated at \$1,036 per household or \$773,888 across the community. Total spending outside the community (excluding travel) is estimated at \$5,546,718. The full data on all categories is included in Appendix One.

Correspondingly, unfulfilled local product and service demand is lead by Groceries, 29% and Clothing, 12%. A full 15% of unfulfilled local demand is for organic and health foods.

Population Attraction – Community Assets and Needs

The top assets of the community as a place to live and work are its people, 14%, the sense of community, 11%, and the beautiful wilderness setting, 10%, followed by its art and culture and safety.

Changes that could be made to improve the area are lead by housing, 24%, and recreation, 18%. Improved transportation links to outside, 7%, year-round businesses, 7%, and a reduced cost of living, 6%, follow significantly behind.

Two areas dominate community viability and the ability to attract more year-round residents. These are housing, 37%, and recreation, 26%. All others are far behind.

APPENDIX ONE – FULL DATA TABLES

| Origin of relocation to Klondike | |
|----------------------------------|-------|
| Elsewhere in Yukon | 10.2% |
| Elsewhere in Canada | 84.7% |
| Outside of Canada | 5.1% |

| Reasons to relocate to Klondike | |
|-----------------------------------|-------|
| Employment | 60.0% |
| Housing | 2.5% |
| Health services | 0% |
| Climate | 4.2% |
| Education | 1.7% |
| Quality of life | 69.5% |
| Recreation | 25.4% |
| Cost of living | 0% |
| Family and personal relationships | 21.2% |

| Household size change (5 years) | Decreased | Same | Increased |
|---------------------------------|-----------|------|-----------|
| Year-round | 11 | 57 | 25 |
| Seasonal | 3 | 19 | 7 |
| Occasional | 2 | 14 | 3 |

| Household size change expected (next 5 years) | Decreased | Same | Increased |
|---|-----------|------|-----------|
| Year-round | 24 | 58 | 8 |
| Seasonal | 7 | 22 | 4 |
| Occasional | 4 | 14 | 5 |

| Household seasonality change | 1-4 Weeks | 5-8 Weeks | Over 8 Weeks |
|------------------------------|-----------|-----------|--------------|
| Increased | 1 | 1 | 9 |
| Decreased | 2 | 5 | 13 |

| Reasons for seasonality change | Increased Time | Decreased Time |
|-----------------------------------|----------------|----------------|
| Employment | 54.5% | 31.6% |
| Housing | 18.2% | 5.3% |
| Health services | 9.1% | 10.5% |
| Climate | 18.2% | 47.4% |
| Education | 18.2% | 47.4% |
| Quality of life | 36.4% | 36.8% |
| Recreation | 9.1% | 26.3% |
| Cost of living | 18.2% | 15.8% |
| Family and personal relationships | 45.5% | 15.8% |

| Expectation to leave Klondike | |
|-------------------------------|-------|
| Yes | 20.0% |
| No | 38.9% |
| Not sure | 41.1% |

| Reasons to consider leaving Klondike | |
|---|-------|
| Employment | 55.8% |
| Housing | 36.5% |
| Health services | 25.0% |
| Climate | 42.3% |
| Education | 42.3% |
| Quality of life | 42.3% |
| Recreation | 44.2% |
| Cost of living | 48.1% |
| Family and personal relationships | 44.2% |

| Destination of possible relocation | |
|---|-------|
| Elsewhere in Yukon | 33.3% |
| Elsewhere in Canada | 63.9% |
| Outside of Canada | 2.8% |

| Location of outside spending | |
|-------------------------------------|-----|
| Whitehorse | 45% |
| Outside Yukon | 32% |
| Online | 23% |

| Drivers of outside spending | |
|------------------------------------|-------|
| Not aware if available locally | 13.0% |
| Price | 79.3% |
| Convenience | 12.0% |
| Quality | 41.3% |
| Not available locally | 91.3% |
| Selection | 64.1% |
| Delivery times | 8.7% |
| Other | 2.2% |

| Cooperative purchasing demand | |
|--------------------------------------|-------|
| Food | 90% |
| (Organic food) | (39%) |
| (Convenience) | (16%) |
| (Local agriculture) | (13%) |
| Wine | 3% |
| Fair trade | 3% |
| Film equipment | 3% |

| Cooperative purchasing concern | |
|---------------------------------------|---|
| Variety | 2 |
| Timeliness | 2 |
| Local business impact | 2 |
| Quality | 1 |

Klondike Household Survey 2011 – Klondike Development Organization

| Outside spending | Proportion | Proportion (ex-travel) | Amount/Household | Total Amount |
|--------------------------|------------|------------------------|------------------|--------------------|
| Travel | 21% | | | |
| Groceries | 21% | 26% | \$1,972 | \$1,472,774 |
| Clothing | 11% | 14% | \$1,036 | \$773,888 |
| Housewares | 5% | 6% | \$477 | \$356,261 |
| Entertainment | 4% | 5% | \$404 | \$301,714 |
| Electronics | 4% | 5% | \$386 | \$288,077 |
| Personal care | 4% | 5% | \$381 | \$284,688 |
| Vehicles | 4% | 5% | \$336 | \$250,576 |
| Furniture | 3% | 4% | \$329 | \$245,462 |
| Recreation supplies | 3% | 4% | \$322 | \$240,349 |
| Hardware | 2% | 3% | \$233 | \$173,689 |
| Financial services | 2% | 3% | \$215 | \$160,232 |
| Automotive repair | 2% | 2% | \$183 | \$136,368 |
| Appliances | 2% | 2% | \$176 | \$131,254 |
| Building supplies | 2% | 2% | \$169 | \$126,140 |
| Child items | 2% | 2% | \$167 | \$124,436 |
| Arts and crafts supplies | 1% | 2% | \$121 | \$90,344 |
| Utilities | 1% | 2% | \$119 | \$88,639 |
| Books | 1% | 1% | \$107 | \$80,116 |
| Pet food | 1% | 1% | \$87 | \$64,775 |
| Health services | 0.5% | 1% | \$46 | \$34,092 |
| Media | 0.5% | 1% | \$46 | \$34,092 |
| Musical supplies | 0.4% | 0.5% | \$34 | \$25,569 |
| Veterinarian services | 0.4% | 0.5% | \$34 | \$25,569 |
| Family members | 0.4% | 0.5% | \$34 | \$25,569 |
| Education | 0.2% | 0.2% | \$16 | \$11,932 |
| Total | | | \$7,427 | \$5,546,718 |

| Local product and service demand | Proportion |
|--|------------|
| Groceries (Organic & health foods – 19%) | 29% |
| Clothing | 12% |
| Electronics | 6% |
| Furniture | 6% |
| Housewares | 6% |
| Coffee shop | 5% |
| Dentist | 5% |
| Toys | 4% |
| Personal care | 4% |
| Art and craft supplies | 4% |
| Financial services | 4% |
| Pet food | 4% |
| Entertainment | 3% |
| Hardware | 3% |
| Baby products | 3% |
| Whitehorse bus | 3% |
| Laundromat | 1% |
| Car rental | 1% |
| Music supplies | 1% |
| Recycled products | 1% |
| Physiotherapy | 1% |
| Computer repair | 1% |

| Assets of Klondike as a place to live and work | |
|---|-----|
| People | 14% |
| Community | 11% |
| Wilderness setting | 10% |
| Art and culture | 7% |
| Safety | 7% |
| Employment | 5% |
| Quality of life | 5% |
| Opportunities | 5% |
| Size | 4% |
| Outdoor recreation | 4% |
| Pace | 4% |
| Tolerance | 4% |
| Rural location | 3% |
| Clean environment | 3% |
| Easy living | 3% |
| History | 3% |
| Activities | 2% |
| No driving | 2% |
| Lifestyle | 2% |
| Mining | 2% |
| No commuting | 1% |
| Involvement | 1% |
| Health care | 1% |
| Events | 1% |
| Economy | 1% |
| Minimal regulation | 1% |

| Changes to improve the area | |
|---|------|
| Housing | 24% |
| (Land availability) | (7%) |
| Recreation | 18% |
| (Trails) | (6%) |
| (Quality fitness centre) | (1%) |
| (Pre-school recreation) | (1%) |
| Transportation links to outside | 7% |
| Year-round businesses (including coffee shop) | 7% |
| Reduced cost of living | 6% |
| Intergovernmental cooperation | 5% |
| Alcohol free community social venues | 4% |
| Incentivize and enforce building rehabilitation | 4% |
| Higher-end employment | 4% |
| Increase population | 3% |
| Decentralize government jobs | 3% |
| Resolve land use conflicts | 3% |
| Local food | 3% |
| Higher wages | 2% |
| Environmental regulation | 2% |
| Less regulation | 2% |
| Decreased seasonality | 1% |
| Adopt and implement a community plan | 1% |
| Bylaw enforcement | 1% |
| Education | 1% |
| Professional services | 1% |

| Community viability and year-round resident attraction | | |
|---|-------------------------|------|
| Housing | | 37% |
| | (Land availability) | (6%) |
| Recreation | | 26% |
| | (Pre-school recreation) | (4%) |
| | (Fitness facilities) | (3%) |
| | (Indoor space) | (3%) |
| | (Artificial ice) | (2%) |
| | (Trails) | (2%) |
| | (Senior recreation) | (1%) |
| Year-round employment | | 7% |
| Health services | | 5% |
| Year-round restaurants | | 4% |
| Government jobs | | 3% |
| Transportation links | | 3% |
| Improve politics | | 2% |
| Sustainability | | 2% |
| Education | | 2% |
| Year-round tourism | | 2% |
| Professional services | | 2% |
| Historic restoration | | 2% |
| Tent City | | 1% |
| SOVA expansion | | 1% |
| Artists | | 1% |
| Cultural tourism | | 1% |
| Reduce cost of living | | 1% |
| Support business | | 1% |
| Economy | | 1% |
| Professional services | | 1% |
| Food quality | | 1% |
| Parks | | 1% |
| Clean town | | 1% |

APPENDIX TWO – SURVEY QUESTIONNAIRE

Part A: Household Details

Q1 How many years have you been living in the Klondike? _____

Q2 a) If you relocated to the Klondike, please indicate if you moved from:

Elsewhere in Yukon Elsewhere in Canada Outside of Canada

Q2 b) Why did you relocate?

| | | | | | |
|-----------------|--------------------------|-----------------|--------------------------|----------------|--------------------------|
| Employment | <input type="checkbox"/> | Climate | <input type="checkbox"/> | Recreation | <input type="checkbox"/> |
| Housing | <input type="checkbox"/> | Education | <input type="checkbox"/> | Cost of Living | <input type="checkbox"/> |
| Health Services | <input type="checkbox"/> | Quality of Life | <input type="checkbox"/> | Family Reasons | <input type="checkbox"/> |
| Other (specify) | <input type="checkbox"/> | _____ | | | |

Q3 How many people in this household are? 0-14 ___ 15-24 ___ 25-54 ___ Over 55 ___

Part B: Population Retention

Q4 How many people in this household would you describe as?

Year-round _____ Seasonal _____ Casual _____

Q5 How did the number of people change, if at all, in the last 5 years?

| | Year-round | Seasonal | Casual |
|-----------------|--------------------------|--------------------------|--------------------------|
| Decreased | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Stayed the same | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Increased | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q6 How do you expect the number of people to change, if at all, over the next 5 years?

| | Year-round | Seasonal | Casual |
|---------------|--------------------------|--------------------------|--------------------------|
| Decrease | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Stay the same | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Increase | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q7 a) Has the time your household members spend in the Klondike annually changed in the last 5 years?

Yes No Not sure

Q7 b) If yes, then by how much is this change?

Decreased By: 1-4 weeks 5-8 weeks Over 8 weeks

Increased By: 1-4 weeks 5-8 weeks Over 8 weeks

Q7 c) With reference to the above question, why do you think these changes occurred?

| | | | | | |
|-----------------|--------------------------|-----------------|--------------------------|----------------|--------------------------|
| Employment | <input type="checkbox"/> | Climate | <input type="checkbox"/> | Recreation | <input type="checkbox"/> |
| Housing | <input type="checkbox"/> | Education | <input type="checkbox"/> | Cost of Living | <input type="checkbox"/> |
| Health Services | <input type="checkbox"/> | Quality of Life | <input type="checkbox"/> | Family Reasons | <input type="checkbox"/> |
| Other (specify) | <input type="checkbox"/> | _____ | | | |

Q8 a) Do you expect to leave the Klondike in the next five years? Yes No Not sure

Q8 b) If 'yes' please indicate reasons for considering moving:

- | | | | | | |
|-----------------|--------------------------|-----------------|--------------------------|----------------|--------------------------|
| Employment | <input type="checkbox"/> | Climate | <input type="checkbox"/> | Recreation | <input type="checkbox"/> |
| Housing | <input type="checkbox"/> | Education | <input type="checkbox"/> | Cost of Living | <input type="checkbox"/> |
| Health Services | <input type="checkbox"/> | Quality of Life | <input type="checkbox"/> | Family Reasons | <input type="checkbox"/> |
| Other (specify) | <input type="checkbox"/> | _____ | | | |

Q8 c) If 'yes' Where are you considering moving to?

- Elsewhere in Yukon Elsewhere in Canada Outside Canada

Part C: Household Expenditure

Q9 What proportion of your expenses is spent outside of the Klondike (percentage estimate)?

- 0-5% 5-10% 10-20% 20-30% Over 30%

Q10 What amount of your expenses is spent outside of the Klondike? _____ \$

Q11 What proportion of your expenditures outside the Klondike are spent?

- | | | | | | | | | |
|---------------|-------|--------------------------|--------|--------------------------|--------|--------------------------|---------|--------------------------|
| In Whitehorse | 0-25% | <input type="checkbox"/> | 25-50% | <input type="checkbox"/> | 50-75% | <input type="checkbox"/> | 75-100% | <input type="checkbox"/> |
| Outside Yukon | 0-25% | <input type="checkbox"/> | 25-50% | <input type="checkbox"/> | 50-75% | <input type="checkbox"/> | 75-100% | <input type="checkbox"/> |
| Online | 0-25% | <input type="checkbox"/> | 25-50% | <input type="checkbox"/> | 50-75% | <input type="checkbox"/> | 75-100% | <input type="checkbox"/> |

Q12 Please indicate your top ten expenses outside of the Klondike and amount if known (estimate):

- 1) _____ Amount _____ \$
- 2) _____ Amount _____ \$
- 3) _____ Amount _____ \$
- 4) _____ Amount _____ \$
- 5) _____ Amount _____ \$
- 6) _____ Amount _____ \$
- 7) _____ Amount _____ \$
- 8) _____ Amount _____ \$
- 9) _____ Amount _____ \$
- 10) _____ Amount _____ \$

Q13 Why do you spend money on products/services outside of the Klondike?

- | | | | |
|--------------------------------|--------------------------|-----------------------|--------------------------|
| Not aware if available locally | <input type="checkbox"/> | Not available locally | <input type="checkbox"/> |
| Price | <input type="checkbox"/> | Selection | <input type="checkbox"/> |
| Convenience | <input type="checkbox"/> | Delivery times | <input type="checkbox"/> |
| Quality | <input type="checkbox"/> | Other (specify) | <input type="checkbox"/> |

Q14 Do you need and/or use products or services you cannot find in the Klondike? Yes No

Q15 What products and services that you currently purchase from outside, do you think could feasibly be supplied locally within the Klondike?

Q16 Do you deliberately search out Klondike businesses? Yes No

Q17 Are you prepared to pay more to buy locally? Yes No If 'yes', how much?

5% 10% 15% 20% 25% 30% 40% 50% 75%

Q18 Do you or could you spend in a co-operative way with other residents (e.g. organic food clubs)?

Yes No

If 'Yes', please specify how: _____

Supplementary Questions

Q20 What do you see as some of the main assets of Dawson as a place to live and work?

Q21 What main changes would you like to see made to improve this area?

Q22 What can be done to make the community stronger and to attract more **year-round** residents?

Q23 Is there anything else you would like to add?

