



FIVE-YEAR YUKON CULINARY TOURISM STRATEGIC DEVELOPMENT PLAN

CELEBRATING THE LAND AND ITS PEOPLE, UNIQUE INGREDIENTS AND FASCINATING STORIES



ESP / CULINARY CONSULTING



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EXECUTIVE SUMMARY

Brief Overview

Current Situational Analysis

Key Recommendations





RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | EXECUTIVE SUMMARY

Brief Overview

The primary objectives of this study are:

- To put forward recommendations to TIA Yukon to create a robust formal structure to advance the Yukon's culinary tourism positioning through a three-part, five-year plan.
- To create a strategy to showcase the Yukon as a world class destination for tourists seeking unique experiences celebrating the natural environment coupled with memorable and distinct culinary adventures.

This report is broken down into two parts, the first offers an overview of the five-year plan which we propose, and the second explores this in-depth, covering our research and methodology.

If the recommendations in this report are adopted, then we believe that the Yukon could potentially achieve the following outcomes in the next five years:

- Increase the number of potential visitors to the territory as the Yukon increases and improves its culinary tourism offerings.
- Increase the profitability of the culinary industry and agricultural industry with a focus on higher-priced, low-yield specialty products, by focussing on less price-sensitive national and international travelers.
- Improve the distribution of travelers to lesser-known or travelled regions of the Yukon through culinary tourism.
- Improve offerings to incentivize visitors during shoulder and off seasons.
- Help position Yukon food and agricultural products for increased local consumption as well as exports as Canadian and international travelers discover the exceptional quality of Yukon-grown products.
- Set up the Yukon for success to become a major player within the world of Northern cuisine.

"I have spent the past seven years exploring the culinary scene in the Yukon which has made me a proud, passionate and knowledgeable advocate for the region. This report, while driven by solid research, is a culmination of many years of on-the-ground cooking with Yukon chefs, meeting with Yukon farmers and food producers, and helping to share their stories locally, nationally and internationally."

- Eric Pateman



EXECUTIVE SUMMARY



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | EXECUTIVE SUMMARY

Current Situational Analysis

In recent years culinary (gastronomy) tourism has emerged as one of the key marketing focuses for destinations around the world. It is the one segment of the tourism industry that touches almost every visitor to every region.

Culinary tourism is not limited to the culinary tourist; everyone has to eat, and more and more people are keenly interested in what they eat: where it came from, whether it was sustainably raised and harvested, and what cultural associations are carried with it.

Food is one of the easiest ways to enhance the visitor experience, as even with key Yukon experiences like wilderness tourism, arts and culture, sports and conferences, Indigenous tourism, everyone eats during their visit and showcasing local culinary talent, products and stories is the best way to differentiate the Yukon from other competitive destinations.

According to our research, these are the key strengths for the Yukon to build on:

Access to The Yukon's Agri-Food:

- 150 Farms within the Territory (one farm for every 240 people)
- Fresh, local ingredients from fresh water, farmland, and producers
- Long growing days and exceptional quality
- The Yukon is capable of growing things people do not normally consider like apples, pinenuts, haskaps, tomatoes, and more
- Events such as the long running culinary festival, Meet your Maker, Fire Feast in Carcross, Fireweed market etc. have created a culinary buzz in the Yukon and are propelling the industry forward

Proximity to Nature and Exceptional Scenery

- The Yukon has an incredible reputation for clean air, pristine lakes and nature
- An abundance of wild foraged foods

- Breweries and distilleries that tout some of the cleanest water on the planet
- The regularity of the Aurora Borealis
- Proximity to Alaska and its drive through traffic
- Hiking, biking and other world class outdoor leisure activities

The People

- While the population is small, the diversity it has is impressive and should be celebrated
- Yukoners are welcoming people who love to share their homes and stories
- Yukoners are receptive to overseas visitors, a population who are well-travelled
- Yukoners value the sense of community the territory offers and are capable of inviting people to be part of it



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | EXECUTIVE SUMMARY

Indigenous Cultures

- The Yukon has one of the highest concentrations of Indigenous populations in Canada, and is home to 11 of Canada's 25 self-governing First Nations
- The people and the stories are unique and identifiable
- Most major businesses in the Yukon have Indigenous ties or investment
- The Yukon can and should be established as one of Canada —and the world's— top destinations for Indigenous tourism experiences and the culinary angle of this is vital for success.

Back in October 2013, a gap analysis was conducted on the Yukon's culinary tourism strategy. Unfortunately, many of the challenges which existed seven years ago are still in place today, however, on the positive side the Yukon perspective has shifted from not seeing the

value in a full-blown strategy to understanding the crucial role culinary tourism can play for visitors.

The main challenges facing the Yukon in this regard are:

- A lack of a cohesive culinary strategy for food tourism which could provide a framework for all of the Yukon and tie into the Canadian national branding
- No dedicated organisation to promote the Yukon as a culinary destination
- Labour and staffing challenges in tourism, agriculture and culinary industries
 - Limited pool of labour
 - Significant lack of staff housing
- Lack of market-ready culinary product
- Lack of collaboration and communication across the culinary sector and complementary tourism sectors
- Lack of local passion for Yukon-grown food

and beverages within the local population

- Lack of resources such as l'abattoirs, root cellars, community kitchens and other amenities to support the culinary industry
- Lack of culinary storytelling, especially from the wealth of Indigenous communities within the territory
- The Yukon has no specific culinary reputation – it is just at the beginning stages
- Tourism Yukon (travelyukon.com) currently has no content related to culinary on their welcome page on their website and the remaining pages on the site have little culinary offerings including the “Discover the Yukon” and “Things to Do”



KEY RECOMMENDATIONS



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | EXECUTIVE SUMMARY

Key Recommendations

Our recommendation is that TIA Yukon follow a five-year strategy, split into three parts:

1. Years one should focus on shifting regulations and creating a solid framework to foster a space where market-ready culinary tourism product can grow and flourish.
2. Years two and three should focus on cross-industry collaboration and product development.
3. Years four and five should have TIA Yukon in a position to shift marketing focus and begin to reap the benefits of solid foundation work creating a destination with local food advocates and ambassadors, collaboration across culinary and tourism industries, market-ready culinary tourism product and tentpole events.

It is important to note that all culinary activities will still be promoted via TIAY social media

channels and www.yukonculinary.ca as the sector develops. This will ensure the public knows that more formal marketing approaches and investments will be needed once we have the products and experiences available, but TIAY will still be sharing stories and information on events as we go.

TIA Yukon has an opportunity to spearhead the development of a culinary leadership group.

- It needs to be a lean and nimble umbrella organization to lead a unifying culinary strategy – culinary tourism is a crowded playing field that moves quickly – this organisation needs to be able to lead and act.
- An organization or board with fewer than 10 people to make decisions would be best.
- This group should have a clear mandate to work with all levels of government, marketing organizations and the private sector to advance this initiative. This should include Tourism Yukon and other DMOs in

the territory to offer a consistent brand message for Yukon cuisine.

This is not a 12-month play.

- There needs to be at least a three-to-five-year commitment to move the needle, with financial commitments from TIA Yukon as well as other levels of government. Focus on being small and great—and be in it for the long term.
- Funding should be sufficient to hire a managing director, a marketing support person as well as financial resources for development pieces such as branding and marketing working with TIA Yukon and other government teams.
- A minimum operating budget of \$300,000 per annum for the first three years should be the goal to significantly move the needle but this could and should be in cooperation with the agriculture sector.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | EXECUTIVE SUMMARY

Regulations need to shift.

- There needs to be major work done with government bodies to shift regulations and create an environment where culinary tourism will flourish.
- By removing or streamlining regulations and rules, there is a great opportunity to create efficiencies and spur innovation in the culinary tourism industry that currently encumbers business growth.

These areas include:

- Labour laws - housing and employment
- Licensing Fees
- Health & Safety - food permits, etc.
- Wild Game & Farmed Game Licensing
- Liquor licensing and access to product - support for growth in the local market
- Foster long-term success by ensuring oceans and farmlands are managed sustainably

- Access to grants, co-op funding for marketing and development, etc.
- Support for growers and the ability to advise/lobby/provide support for protection of valuable soils with industry bodies
 - Create government-funded or public/private staff housing
 - Explore staff sharing between businesses to create year-round employment and more stability
 - Work with the government to create sustainable and open markets for proteins such as Yukon-raised elk, deer, bison, etc.
- If the groundwork of changing regulations, creating collaborative networks, and developing new culinary tourism product is done well, then there will be a firm foundation to begin marketing the Yukon as a place to enjoy extraordinary culinary adventures.

To achieve this:

- Work with existing industry associations to develop divisions dedicated to culinary tourism (e.g. Parks Canada, Tourism Yukon, Outfitters Association, etc.)
- Take the lead from countries like Finland and Sweden and market winter as more than just Aurora viewing – use culinary to tap into other markets and enhance offerings
- Tap into the compression in Banff and Whistler in winter and offer a better product
- Target weekend urban adventurers in the Calgary and Vancouver markets with set adventures



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | EXECUTIVE SUMMARY

Tell the story

However - do not try and make it JUST about food. Use culinary as the garnish to accentuate the incredible unique natural experiences that The Yukon is so well known for.

- Dining under the Midnight Sun in the summer months
- Yukon Whisky & Beer fishing weekends
- Local cuisine combined with snow shoeing, cross-country skiing or sledding
- Dinners under the Northern Lights

Define the narrative

By starting to define what the Yukon's food story is, you will start to identify and share the region's clear and concise unique selling proposition. This will lead to an increase in visitation and a new base of customers who travel to the Yukon for culinary experiences with enhanced natural experiences.

- Monthly wild products featured in restaurants such as game meats, spruce tips, morels, fireweed, etc.
- The Yukon has the cleanest air and purest water – capitalize on that with Yukon-raised meat, distilleries and breweries

Build a strong foundation

Embrace the region's fascinating history and wealth of Indigenous Cultures and put money and resources (people) into helping them develop their stories. This is a significant unique selling proposition and can and should be the foundation of an identifying Yukon cuisine.

- Fire feast dinners
- Kayak and storytelling with Indigenous healing foods and tea breaks
- Create an Indigenous module as part of local cooking schools
- Reduce health regulations to allow tourists to eat in homes with locals (Airbnb experience-style)

Put people in the spotlight

Celebrate the farmers, foragers, fishers and producers and make them your rock stars and storytellers. Chefs are the conduit and without the farmers and producers, you will not have a viable long-term story to tell.

- Expand the successful 'Meet your Maker' program in Whitehorse to other regions within the territory, including an online portal for year round connections through the territory
- Facilitate a "stage" program for Yukon Chefs and cooks to learn outside the Yukon and then bring back techniques and ideas whilst spreading the unique Yukon story in culinary circles
- Farm Days and more farm sales – try and make a more direct link to the consumer
- Year round, indoor farmers & artisan market

Give people a reason to come and many reasons to stay – be very clear on your unique selling proposition!

IN-DEPTH OVERVIEW

Objectives from the statement of work

Global Culinary Tourism Industry

The Yukon's Culinary Tourism Industry

SWOT Analysis





RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

In-depth Overview

Until recently, culinary tourism has not formed an integral part of the Yukon's marketing or brand strategies.

Today, the Yukon is starting to find its footing with an agriculture and culinary scene that is making waves, and organizations like Tourism Yukon and national media are starting to take notice.

While the growing season is short, the quality of produce grown rivals that of any in the world due to the clean air, clean water and intense daylight hours of the summer months.

In conjunction with learning how to elevate the Yukon's culinary brand and accentuating and elevating the current experiences offered, there is also interest in building better ties with agriculture, creating links with the Indigenous population, and working on the development and growth of culinary-related marketing and events.

The Local Food Strategy for the Yukon (2016 – 2021) is a great resource that was put out a few years ago but offers many relevant tactics.

www.emr.gov.yk.ca/agriculture/pdf/local-food-strategy-for-yukon.pdf

This report covers recommendations to TIA Yukon for advancing the Yukon's culinary tourism positioning and strategy, including:

- A current market analysis of regional food, beverages, agri-tourism, and supporting services.
- The identification of gaps and supporting initiatives as they relate to the overall marketing strategy of the Yukon, with culinary as an independent unit and also as an accentuator of other marketing pillars.
- The opportunity for enhanced culinary festivals (or series of monthly programs) to enhance and showcase the Yukon's culinary scene.

- Identification of key players in the local market who could be engaged to drive forward a long-term strategy.
- An understanding of the opportunities which exist to create stronger ties between the Yukon's tourism industry and Indigenous tourism operators within the Yukon through culinary activities.
- A recommended action plan for TIA Yukon's culinary tourism planning as it relates to the Yukon Tourism Development Strategy.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

The project was developed in four phases:

#1 - Alignment

The Alignment Phase is designed to confirm key elements of the engagement and ensure alignment with TIAY's expectations, such as:

- Engagement with the Agri-Culinary Tourism Committee (ACTC) and Coralie Ulyett, New Project Manager, Yukon Culinary Strategy
- Culinary tourism development
- Finalize project objectives, approach, timelines and key milestones
- Stakeholder engagement tactics
- Creation of a communications plan
- Project management approach

#2 - Diagnostic

Research tourism and culinary opinion leader expertise with a situational analysis of the Yukon's culinary tourism industry including:

- Inventory analysis of tourism culinary initiatives and review of current marketing and promotional initiatives by tourism partners like Air North, Yukon's Airline, Yukon Brewing, Northern Vision Development (NVD), etc.
- Review of global best practice identification
- SWOT Analysis

#3 - Engagement

Listen and learn from stakeholders and partners

- Outreach to key industry stakeholders including chefs, hoteliers, Indigenous populations, DMO's, farmers, city and regional representatives, transportation companies, brewers and distillers, specialist and general tour operators, artisan producers, foragers, etc.
- Round tables were conducted in six key communities including Whitehorse, Dawson, Carcross, Mayo, Haines Junction and Carmacks. We made an effort to also hold a round table in Old Crow, but due to extenuating circumstances, this was not possible, however emails and phone calls were made.

#4 - Activation

Written report with options and recommendations for a culinary strategy including such key areas as:

- leadership options, public/private collaboration, opportunities for government action, industry innovation, product development and marketing initiatives
- Other areas of focus will also include brand positioning, festival/ event activation opportunities, local economic development, education, skills and talent development, Indigenous development and exploring potential key strategic partnerships

The final draft will be presented to TIA Yukon and its Agri-Culinary Tourism Committee for comments and reflection before the report is finalized and released at TIA Yukon's discretion



OBJECTIVES FROM THE STATEMENT OF WORK



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Objectives from the statement of work

From our analysis we have determined that depending on the extent of adoption of our recommendations from the private sector industries, regional and territorial government and TIA Yukon (and the level of investment in supporting the recommendations contained herewith in for the strategy) the Yukon could potentially achieve the following outcomes:

- Grow the industry by following a long-term strategy to develop diverse, authentic, and high-quality culinary experiences that excite those traveling to and within the Yukon and create value for Yukoners.
- Identify current gaps and opportunities and share them across the industry for adoption while focusing efforts on promoting collaboration and communication with businesses including farmers, producers, outfitters, event planners, restaurant

owners/managers, chefs, caterers, tourism operators, etc. in order to strengthen capacity.

- Improve the distribution of travelers to lesser-known or travelled regions of The Yukon through culinary tourism and improve offerings and incentivize visitors during shoulder and off seasons.
- Increase the number of potential travelers as the Yukon increases and improves its number of culinary tourism offerings.
- Increase the interest and likelihood of travel to the Yukon as the breadth and depth of experiences increases.
- Increase the profitability of the culinary industry and agricultural industry with a focus on higher-priced, low-yield specialty products, with the focus on less price-sensitive national and international travelers.
- Help position Yukon food and agricultural

products for increased exports as Canadian and international travelers discover more culinary products, and the purity of the offerings.

- Identify whether the culinary tourism development initiatives pilot project should be self-sustained in the Yukon through the private sector or whether it would need to be a publicly funded service to support the business community. I believe a public / private partnership will be the best model.
- Map out a plan for the next five years to maximize impact.



GLOBAL CULINARY TOURISM INDUSTRY



- An Overview of the Global Culinary Tourism Industry
- Opportunity for Economic Development & Local Community Engagement
- Definitions of Culinary Tourism and Culinary Travelers



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

What Is Culinary Tourism?

In recent years culinary (or gastronomy) tourism has emerged as one of the key marketing focuses for other destinations around the world. It is the one segment of the tourism industry that touches almost every visitor to every region.

“By combining travel with these edible experiences, culinary tourism offers both locals and tourists alike an authentic taste of place in our bountiful province.”

- Ontario Culinary Tourism Alliance

Culinary tourism is defined by the Ontario Culinary Tourism Alliance, one of the world's leading culinary tourism marketing organizations, as *“The pursuit of unique and memorable eating and drinking experiences. By combining travel with these edible experiences, culinary tourism offers both locals and tourists alike an authentic taste of place. It includes any tourism experience in which a person learns*

about, appreciates, consumes or—dare we say—indulges in food and drink that reflects the local cuisine, heritage, or culture of a place.”

To repeat: culinary tourism is not limited to the culinary tourist. The activities of this sector affect most, if not all, visitors. Everyone has to eat, of course, and more and more people are keenly interested in what they eat: where it came from, whether it was sustainably raised and harvested, and what cultural associations are carried with it.

Global Culinary Tourism

The UNWTO (Gastronomy Network Action Plan, 2016/2017, pg. 7) has identified five fundamental reasons for the growth of culinary tourism:

A destination's need to differentiate itself and develop a unique selling proposition naturally leads to a search for authenticity, and there is nothing better than intangible heritage to achieve authenticity, a domain in which

gastronomy predominates.

Destinations turn to gastronomy to attract the kinds of tourists interested in immersing themselves in places and cultures that they visit. This traveler profile has the potential for increased spending, a more balanced distribution in the territory and to have a greater impact on the entire tourism value chain.

Gastronomy tourism has the potential to direct tourism flow to less visited locations, which could mean new opportunities and economic development for these regions.

Gastronomy enables the design of an effective communication strategy, using a narrative that easily appeals to the emotions of potential visitors and provides a deeper and more meaningful experience that can leave a more lasting impression.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Global Culinary Tourism (cont.)

This memorable and authentic experience generates visitor loyalty. These visitors, in turn, become destination ambassadors, sharing positive experiences with other travelers.

The UNWTO explains:

“Gastronomy is recognized as a key resource in sustainable tourism development, and has the potential for increased spending, a more balanced distribution in the region and to have a greater impact on the entire tourism value chain.” (Gastronomy Network Action Plan, 2016/2017, pg. 19.)

- Some of the significant benefits of culinary tourism for the Yukon are:
- It is a catalyst for the local economy. Culinary tourism provides the opportunity for job creation and the development of local economies, which in turn help other sectors. It is also a major contributor to

overcoming seasonality. (Gastronomy Network Action Plan, UNWTO, 2016-2017, pg. 19.)

- It can support and improve other key tourism sectors and marketing areas.
- If properly supported and positioned, it contributes to the development of tourism products and experiences.

The evolution of a culinary identity in the Yukon offers great opportunity. Although Indigenous communities within the Yukon have been there since time immemorial, the territory is not bound by centuries-old traditions, it is, therefore, in a unique position to determine what culinary stories are being told. Present-day food culture is constantly being interpreted, explored and shared. Intangible heritage (food culture) is a crucial component of successful tourism development and the marketing that supports it (Gastronomy Network Action Plan, UNWTO, 2016-2017, pg. 7





RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Definition of Culinary Travelers

Deliberates (30% of all culinary travelers):

Those who took one or more trips where the availability of culinary activities was a key reason they took a trip or where the availability of culinary activities helped them choose between potential destinations.

Opportunistics (26% of all culinary travelers):

Those who took one or more trips where they sought out culinary activities, but who say those activities were not a factor in choosing between destinations.

Accidentals (19% of all culinary travelers):

Those who took one or more trips where they participated in culinary activities simply because they were available (and discoverable).

Unclassified(25%):

Those who did not clearly fit into any of the above categories.

Other studies reflect the motivation of the traveler. A study by Failte Ireland (2) categorizes travelers in the following way:

1. **Culinary tourists:** Seek unique, memorable eating and drinking experiences—10% of the market
2. **“Food as Fuel” tourists:** Want to consume food as quickly and cheaply as possible—10% of the market
3. **Leisure Tourists:** Want high-quality food and experiences, but this is not the primary motivation for travel—80% of the market.

Sources:

1. Mandala, L., 2017 The American Culinary traveler Report
2. Failte Ireland, Food and Drink Strategy





THE YUKON'S CULINARY TOURISM INDUSTRY



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Current Situational Analysis

In 2013, TIA Yukon identified that culinary tourism was an emerging trend and, if nurtured, could significantly enhance the Yukon's tourism industry. Over the past seven years, TIA Yukon has brought community stakeholders together to form committees, establish annual events, build capacity in communities, conduct research, and advocate for the continued support and development of culinary tourism in the Yukon.

It is evident that, in order to maximize the benefits of the efforts that have been put forth over this time frame, that a formal strategy needs to be developed that focuses on leadership, collaboration, product development and marketing.

The Yukon culinary festival (which began in 2013) under the leadership of TIA Yukon with partners including Air North, Yukon Brewing, NVD and Parks Canada has led to a buzz

nationally for the Yukon's wild cooking, incredible ingredients and cultural flavours.

"The culinary experience in the Yukon is something that enhances the visitor experience overall", said Blake Rogers, Executive Director of TIA Yukon. "Many who come to the territory are pleasantly surprised by the calibre of our restaurants, and the amazing flavours that can be found here". (From 2015 press release)

Here are some of our findings related to the current culinary tourism landscape:

- There is no unified territorial strategy for food tourism which could provide a framework for all of the Yukon and tie into the Canadian national branding.
- The Yukon has no specific culinary reputation – it is just at the beginning stages.
- The Yukon has an incredible reputation for clean air, pristine lakes and nature.

- The Yukon is home to one of the largest and most concentrated Indigenous populations in Canada per capita.
- There is one farm for every 240 Yukoners.
- Events such as the long running culinary festival, Meet your Maker, First Nations Fire Feast in Carcross, the Fireweed Market, and more have created a culinary buzz in the Yukon and are propelling the industry forward.
- The recent YFNCT Conference held in Whitehorse had a significant Indigenous culinary presence.
- Tourism Yukon (travelyukon.com) currently has no content related to culinary on their welcome page on their website and the "Discover the Yukon" and "Things to Do" have little culinary offerings.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

The Gap Analysis conducted in October 2013 identified many opportunities and challenges in her research. Most notably at the time was that Yukoners did not see the value in a full-blown strategy back then, but they did see potential in the sector. Many of the advantages and challenges identified back then are sadly still relevant today and highlight the lack of movement in the sector until very recently due to lack of funding and regulatory challenges. Some of the items highlighted in the report included:

Advantages:

- The Yukon has talented chefs, diverse restaurants and quality regional products
- The Yukon has thriving farmers markets in different parts of the territory featuring local food and food product
- The Yukon has a number of breweries and distilleries in operation and incredible growth potential in this sector

- The Yukon is actively exploring innovative tools and techniques to address food security and promote food sovereignty
- The Yukon offers a wide variety of multicultural cuisine available in the Yukon and celebrates cultural diversity
- The Yukon has a rich Indigenous culture, intrinsic to the territory

Challenges:

- There is a lack of formal leadership, clear roles and financial commitment in the culinary tourism sector
- Distribution channels for local products
- Lack of education within the sector to see the value of local food products
- No one food or dish is closely identified with the Yukon
- Given the great variety of foods and styles that are associated with the Yukon, it is difficult to communicate to consumers a well-defined style and image of Yukon cuisine
- There is a lack of local culinary pride, and local audiences may not perceive the Yukon as a culinary destination
- Local restaurants, B&Bs and hotels are not doing as much as they could to promote the use of local ingredients
- Lack of product development for market-ready experiences



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

The Gap Analysis conducted in October 2013 identified many opportunities and challenges in her research. Most notably at the time was that Yukoners did not see the value in a full-blown strategy back then, but they did see potential in the sector. Many of the advantages and challenges identified back then are sadly still relevant today and highlight the lack of movement in the sector until very recently due to lack of funding and regulatory challenges. Some of the items highlighted in the report included:

The Yukon recently released the 2018-2028 Tourism Development Strategy after many months of consultation with industry stakeholders. The key goals identified in the document include:

- To create a thriving tourism economy
- To have sustainable tourism development
- To increase resident support for tourism

The goals are backed up by the four pillars of focus for the strategy which include:

- Foundation for generational change
- Outstanding visitor experiences
- Vibrant First Nations history and Culture
- Sharing the Yukon's story

Key opportunities of a strategy that have been identified and noted in the framework for the Yukon Culinary Development Initiative (YCDI) include:

- The culinary strategy for the Yukon should build on the pillars with a focus on "Local First", providing a reason for Yukoners to be proud and showcase their farmers, fishers and foragers, local producers and artisans.
- To facilitate change the best way is to start with youth and the local population. The Yukon has an opportunity to build culinary programming and storytelling into local grocery chains, into educational programs at elementary schools and more.
- Food is one of the easiest ways to enhance the visitor experience, as even with key Yukon experiences like wilderness tourism,

arts and culture, sports and conferences, everyone eats during their visits and showcasing local culinary talent, products and stories is the best way to differentiate the Yukon from other competitive destinations.

- The Yukon can and should be established as one of Canada's and the world's top destinations for Indigenous tourism experiences and the culinary angle of this is vital for success. It is essential that there is clear communication with Indigenous partners, such as YTFN, on this so that the indigenous culinary piece is integrated into the overall Yukon culinary story. There are many product development opportunities in this space that could not only help showcase the Yukon as a destination, but they would also provide economic benefit to Indigenous communities.
- Training, mentorship and collaboration within the sector and territory as a whole including tourism and agriculture is paramount.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Without a unified strategy (which TIA Yukon has the opportunity to lead), the territory risks missing the opportunity to capture the culinary tourism market, and in particular, the high-yield, long-haul international traveler that is the prime target for all destination organizations.

The objective is to make the Yukon a destination of choice within the world's Northern communities, and within Canada. However, at present there are several issues which are hindering this goal.

We believe that when addressed and managed appropriately, each of these issues may become opportunities to enhance the region's positioning within the culinary tourism industry.

The opportunities have been categorized into the following four key themes:

1. Leadership (including a sub-sector on policy and regulatory review)
2. Collaboration
3. Product Development
4. Marketing

The recommendations discussed in the final section of this report have been developed to provide flexible solutions for TIA Yukon to best address these four priority areas.





SWOT ANALYSIS



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Strengths

Access to The Yukon's Agri-Food:

- 142 Farms within the Territory (1 farm for every 240 people)
- Fresh, local ingredients from fresh water, farmland, and producers
- Long growing days and exceptional quality when in season
- The Yukon is capable of growing things people do not normally consider like apples, pinenuts, haskaps, tomatoes, etc.

Proximity to Nature and Exceptional Scenery

- Access to some of the most pristine wilderness on the planet
- An abundance of wild foraged foods
- Breweries and distilleries that can tout some of the cleanest water on the planet

- The regularity of the Aurora Borealis
- Proximity to Alaska and its drive-through traffic
- Hiking, biking and other world class outdoor leisure activities

The People

- While the population is small, the diversity it has is impressive and should be celebrated
- Yukoners are welcoming people who love to share their homes and stories
- Yukoners are receptive to overseas visitors, a population who are well-travelled
- Yukoners value the sense of community the territory offers and are capable of inviting people to be part of it

Indigenous Cultures

- The Yukon has one of the highest concentrations of Indigenous populations in Canada and 11 of Canada's 25 self-governing First Nations
- The people and the stories are unique and identifiable
- Most major businesses in the Yukon have Indigenous ties or investment



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Weaknesses

- Poor national and international knowledge of The Yukon as a culinary destination
- No cohesive territorial strategy or body to promote the territory as a culinary destination
- Distribution channels from outlying communities
- Lack of amenities in outlying communities
- Labour and staffing challenges in tourism, agriculture and culinary industries
 - Limited pool of labour
 - Significant lack of staff housing
- Lack of market-ready culinary tourism product
- Lack of collaboration in the sector and complementary sectors
 - Communication
 - Direction
 - Vision
 - Need a key message and vision that binds everyone – organization or people to facilitate it
- Lack of local passion in the population for food and beverage – need education and buy-in from all levels of food industry, including grocery stores, etc.
- The Yukon has not carved out its own unique story
- Lack of availability of culinary experiences beyond restaurants
- Lack of culinary storytelling related to Indigenous cuisine
- Higher level of financial risk associated with the culinary industry and as such, can make it difficult to access capital investment



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Opportunities

- Blank slate: opportunity to develop a solid cohesive brand and reputation for culinary tourism in the Yukon
- Opportunity to offer culinary experiences that accentuate the natural experiences of the region – take your best assets and make them even better!
- You do not need to be something for everyone. Focus on giving a unique experience to high-yield guests
- Focus on being natural, organic. Do less and charge more – high value / high yield – delivery on quality not quantity
- Product development
- Culture
 - Large, diverse Indigenous population
- Indigenous passion and cultural background
- Current lack of defined product
- Ability to work with Alaska and capture drive through traffic
- Fireweed Market would benefit from an expanded presence by moving indoors to offer a year-round, multi-day experience.
- More events in outlying communities (with government support)
- Indigenous Fire Feasts - invite the country, invite the world
- Indigenous farming, youth engagement and employment
- More Education of school children, building on programs like:
 - Kids on the Farm Program kidsonthefarm.yukonfood.com
 - From the Ground Up yukon.ca/yukonfromthegroundup
- Government supported distribution channels



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | IN-DEPTH OVERVIEW

Threats

- Significant competition and investment in culinary tourism from competing regions, provinces and other countries; some with longstanding strategies
- Lack of necessary funding to develop the sector
- Lack of leadership
- Lack of a cohesive effort on a territorial level
 - Differing goals and messages
 - Lack of dedicated resources necessary to achieve an international reputation – people, time and money
- The idea that it should be marketing first – for this to succeed, there needs to be framework and product development first – only one chance to make a first impression – need a solid plan
- Lack of a unique selling proposition of the region's culinary brand



OPINIONS & RECOMMENDATIONS

Goals

Leadership & Regulatory

Collaboration

Product Development

Marketing





GOALS



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Goals

1. Industry understanding, collaboration and knowledge
2. Creation of a strategy through engagement, collaboration and a structured leadership plan
3. Identify current gaps and opportunities and use them to significantly increase the inventory of product experiences that are market and export-ready
4. Work with local Indigenous populations, assuming they are willing, to position the Yukon as one of the top Indigenous culinary destinations in Canada
5. Work with Tourism Yukon and other DMO's and private sector businesses in the territory to offer a consistent brand message for Yukon cuisine





LEADERSHIP & REGULATORY



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Key Focus: Leadership & Regulatory

Current State:

- There is only a temporary organization dedicated to advancing and advocating for culinary tourism in the Yukon at the present time with limited financial resources (the TIA Yukon Working Agri-Culinary Tourism Committee with Coralie Ullyett leading the charge thanks to CANOR funding in the last 9 months).
- The current landscape is fragmented with different organizations working independently of each other (tourism, agriculture, culinary, outfitters, etc).
- With no clear vision, long-term funding, investment strategy or group/ organization set to lead the culinary tourism charge, opportunities are being missed.
- The regional and territorial governments

offer limited support for small-and medium-sized enterprises (SMEs) and their profitability in restaurants, tourism and agriculture. This is coupled with a reluctance to invest in research and development of the sector due to lack of perceived value and potential return on investment.

- There is a lack of regulatory and/or policy issues that support the industry – labour, housing, etc.
- Financial pressures with increasing land prices and operating costs are challenging for the industry, especially agricultural land

Opportunities & Recommendations:

If funding and political support are received to implement the recommendations contained in this report, TIA Yukon has an opportunity to spearhead the development of a leadership group. This group will provide a platform to showcase the Yukon's investment in (and support of) a program for culinary tourism

which benefits SMEs.

Either TIA Yukon, a sub-sector umbrella organization, or a new culinary tourism organization needs to take the leadership role and develop a regional culinary tourism strategy with this group including defining the key positioning and unique selling propositions of the Yukon, and working with industry associations and operators.

This team needs to be lean and nimble and financially equipped for a short-, medium- and long-term implementation. This group should have a clear mandate to work with all levels of government, marketing organizations and the private sector to advance this initiative.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Key priorities for this group should be:

Work with various levels of government and industry associations on an on-going basis, to include reviewing policy and regulatory constraints which impede growth, profitability and competitiveness, whilst proposing and implementing changes including:

- Labour laws - housing and employment
- Licensing fees
- Health and safety - food permits, etc.
- Farmed game licensing, rules and regulations
- Liquor licensing and access to product - support for growth in the local market
- Sustainability to ensure long-term success and maximizing the resources of oceans and farmlands
- Access to grants, co-op funding for marketing and development, etc.

- Support for growers and the ability to advise/lobby/provide support for protection of valuable soils with industry bodies

Most importantly, make sure whatever support is offered by government, associations, and others is communicated effectively across all industry platforms.

Make sure all the right people are at the table including:

- Travel Yukon
- Yukon Agricultural Association
- Tourism Industry Association of Yukon
- Klondike Visitors Association
- Yukon Outfitters Association
- Festival and Community Market organizations
- First Nations Community leaders

- Economic Development departments and organizations
- Municipal governments responsible for licensing
- Yukon First Nation Culture & Tourism Association

Work with local Indigenous populations, if desired, to leverage and promote the Indigenous landscape as it could--and should-be a pillar for the Yukon culinary scene



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Potential Impact and Outcomes

- A dedicated group and strategy will help tourism operators and the industry to better align themselves with a consistent brand and story for the marketplace, and also potentially be the platform for all of the Yukon to follow.
- The leadership could work with existing industry associations to develop divisions dedicated to culinary tourism (e.g. Parks Canada, Tourism Yukon, Outfitters Association etc.)
- By starting to define what the Yukon's food story is, you will start to identify and share the region's clear and concise USPs. This will lead to an increase in visitation and a new base of customers who travel to the Yukon for culinary experiences/enhanced natural experiences.
- By removing or streamlining regulations and rules, there is a great opportunity to create efficiencies and spur innovation in the culinary tourism industry that currently encumbers business growth.
- With the potential for higher profit margins from reduced regulations on businesses, investments in product development would likely improve the Yukon's culinary tourism experience offering.
- Create pride within the local population and grow the pool of storytellers. This in turn may help shift the tide regarding the career perceptions of the industry and also help drive new retail sales in mainstream grocery, and thus improve the market opportunities for food artisans.
- Help tourism operators identify and focus on a specific target market which has the opportunity to drive business to outlying regions and focus on non-compression periods.
- Without a leadership group and focused strategy, or a go-to resource body for direction and intervention, operators will continue with a fragmented approach and there will be no consistency in the brand or messaging for the region.



COLLABORATION



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Key Focus: Collaboration

Current State:

- Although the Yukon has both products and resources, a lack of coordination and cooperation within the sector has led to an absence of a cohesive strategy or the investment necessary to bring about collaboration within the culinary tourism sector
- There is a significant lack of communication between all levels of the industry and government, and it is even present inside the culinary community itself (although that has improved with the appointment of Coralie Ulyett in 2019). This leads to confusion and lack of ability to move things forward in a timely or cost-efficient manner. Government, tourism agencies, private sector businesses, educational facilities and non-profits all need to be working together.
- There is little cross-marketing amongst the mainstream grocery industry, food service and tourism. While this is improving (with the efforts of people like Mark Wykes, from Independent Grocer) more needs to be

done to fuel the passion of the local population for buying local and celebrating Yukon cuisine, and understanding the value of local products.

- There is a very collaborative nature from key industry partners like Parks Canada, Air North, Northern Village Development, Yukon Brewing, and the chefs in the culinary community, but this is only for a short period of time each year and it needs to happen year-round.
- Tourism & Culture has expressed a desire to make culinary tourism a priority, but efforts to develop a multi-year workable plan with industry have been hampered by red tape.

Opportunities & Recommendations

- Whitehorse, as the Yukon's gateway city, needs to take the lead and bring together other regional governments and marketing organizations to facilitate a strong culinary brand for the whole territory. Focus on common threads including wild, native ingredients and the protection of agricultural lands. Connect and foster relationships with your neighbours e.g.

Alaska & B.C.

- Whitehorse has a strong foundation to build on, but the Yukon is more than one city; some great culinary experiences are found in the surrounding areas including Carcross, Haines Junction and Dawson. These need more of a focus in terms of driving business between the various regions and increasing product development in the outlying areas, but this will require government funding in the short to medium term, as due to the low population numbers, it is hard for these to be grown on their own.
- One of the Yukon's greatest strengths is its proximity to incredible nature and yet there is very little collaboration between nature-based tourism operators and the culinary sector. Develop nature-themed culinary festivals and events to capitalise on this.
- Indigenous Cultures offer the largest opportunity for the Yukon to create a unique food culture, and there is a fantastic opportunity for Indigenous chefs to collaborate with other high profile chefs, beverage companies, etc. to start new brands.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

- The government has an opportunity here to support investment in Indigenous culinary tourism products.
- Change starts with the next generation, and school programs should be initiated with local chefs and grocery chains to educate elementary school children on local Yukon-grown foods and create pride in supporting local agriculture and the people involved in the industry. Make the farmers and foragers the next rock stars!
- Few restaurants are working with Yukon Tourism (Tourism & Culture), representing all of the Yukon and the Klondike Visitors Association (KVA). While they may rely on travelers as customers, few understand how to enhance their products and experiences to meet their needs, or what differentiates a good culinary experience from an excellent one. This provides an opportunity to work with SMEs to create guidelines, product enhancement recommendations and further education on developing and enhancing experiential products for international travelers.
- Education of operators is key. The group will need to facilitate workshops and work with tourism operators to integrate culinary experiences into their businesses and building and strengthening community support.
- Facilitate alignment between the agricultural sector and the restaurant industry, there should be twice annual “Meet Your Maker” programs set up which ensure connection and conversations between chefs, farmers and producers, which drive more local purchasing and also reduce distribution challenges.
- A community incubator kitchen which will help grow value-added products and science-based innovation, which helps drive domestic and export sales and ensures a more robust value chain for the sector. This could also include community cold storage and freezers. There is talk of a development of this nature at Yukon College.
- There is an opportunity to look at a model for shared housing and employees as this seems to be a major hurdle for the whole industry. Government needs to look at solving this challenge before many of the other recommendations will be able to be implemented.
- Look outside the Yukon - there are opportunities for cross-branding and collaboration with other provinces and territories, global Indigenous communities, etc. Take part in events like <http://cookscamp2020.com>
- Consider a centralized food guild/distribution offering like Tofino has to solve some of this distribution challenges. <https://www.tucg.ca/Default.asp>
- Explore and solidify trade and/or marketing deals with neighbors like Alaska and B.C.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Potential Impact and Outcomes

- By facilitating workshops, this new organization can spearhead industry understanding, collaboration and encourage shared knowledge.
- Once institutions of higher education, like colleges and universities (Yukon College is presently working on certification to become a university), are encouraged to see value in the food sector they will start to create programs and courses relating to culinary tourism.
- Other government territorial and national departments (e.g., Ministry of Agriculture, ITAC, etc.) will work with the private sector to provide more opportunities.
- A full and identifiable list of partners for collaboration within the sector (non-traditional) would be established and create new opportunities for the sector and industry. Everything from automotive to

transportation and energy have been partners in other countries around the world.

- By working together, and engaging local populations and the young, you can start to create and encourage a culture of culinary pride.
- One of the great challenges in the food sector is distribution and by collaborating with farmers, suppliers and chefs, there is an opportunity for better systems and more use of local products in all levels of food service and grocery.
- As the market works together you will start to see more local product available year-round, and this will start to increase demand from the local population, and thus improve the value chain.





Archbould Photography



PRODUCT DEVELOPMENT



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Key Focus: Product Development

Current State:

- Whitehorse is now home to a couple of award-winning, high-profile restaurants and a growing list of chefs who are passionate and worthy ambassadors of the region.
- There is currently no standard for market-ready product which poses challenges from a marketing perspective.
- There are limited resources for the private sector to increase product development. The territory is only as strong as its weakest players and there needs to be more investment in product development—not just marketing.
- For a territory that prides itself on its Indigenous footprint, there is a noticeable lack of development of Indigenous product that is unique to the region. Examples of products currently available:
 - Shaka Tun Adventures - shakattunadventures.com

- Long Ago Peoples Place in Champagne
- There are also cultural centres in almost every Yukon community - yukonfirstnationculture.com

- The region is capable of growing an amazing assortment of local products both indoors and outdoors, including many species you would not normally associate with the north (like basil, apples, salad greens, etc).
- Aside from restaurants, there are very limited agri-tourism and other culinary-inspired products available in the marketplace and no product development pipeline in place although there are discussions about an incubator kitchen.
- There is a great deal of potential for the creation of world class culinary events with the right support from both the public and private sector, however thanks to limited budgets and short time frames, the current culinary-focussed events are not yet at that standard.

Opportunities & Recommendations

- Develop a funding program to support product development. This is key and although not something governments typically do; it is strongly recommended as a way to start raising the bar and ensuring that the Yukon stands above other destinations.
- Such as: opening land up to agricultural development, developing government-funded housing for workers, offering marketing grants for SMEs to develop and grow their product base and sell beyond the Yukon. The key message here is that you can't sell what doesn't exist. Support is needed.
- Develop industry-led strategies and tactics to enhance culinary tourism products and experiences to align with the regional strategy. If the industry itself helps create the strategies and tactics and feels like they have some investment, they tend to move quicker and engage in more meaningful ways to deliver a superior product.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

- With the quality of the produce being grown within the territory and the number of farms per capita, there needs to be far more emphasis on getting people out to the farms. Agri-Tourism needs to be a key focus for storytelling, product development and consumer engagement.
- Develop product enhancement workshops with best practices guidelines for people to learn from – look at global examples, especially from other Nordic regions like Denmark, Finland, Sweden, Iceland, but also from global leaders like Australia, Singapore, and Japan. Work with all levels of the value chain for food to increase pricing (both private and public sector).
- With a solid reputation and platform for Indigenous tourism, there needs to be more investment in and facilitation of growth in this sector as it could—and should—be a key pillar for the territory. Currently, the lack of available product is very evident.
- The Yukon is known for its incredible natural features, but there could be a much better use of those natural resources to create experiences and cross-marketing them within the culinary sector.
- The Yukon has favorable weather on a year-round basis and while the peak summer and winter seasons will be a focus, there should be more emphasis on designing events and celebrations that drive traffic in the shoulder seasons. People need a reason to come; think of out of the box reasons and design interesting marketing campaigns around them. For example, Tofino in British Columbia has created an industry around the storm watching winter season.
- There is an opportunity to create regular culinary festivals and monthly events that showcase the casual and fun nature of the people of the Yukon and also highlight its proximity to nature and the elements that make the region so unique.
- Oysters and Yukon whisky combined with cross-country skiing or snowshoeing
- Oyster festival playing off the popularity of Wayfarer Oyster House but holding it at the top of the Dome in Dawson or in Keno - give people a reason to come!
- Dinners in cabins or tents under the Northern Lights
- Monthly wild products featured in restaurants and stores including:
 - Spruce tips
 - Honey
 - Fireweed
 - Wild and Farmed Game Meats
 - Brewery Month
 - Distillery Month
- Expand the successful “Meet Your Maker” program in Whitehorse to other regions of the Territory and provide funding to bring farmers down and help develop distribution channels



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

- Facilitate a “stage” program for Yukon Chefs and cooks to learn outside the Yukon and then bring back techniques and ideas, but this also helps spread the unique Yukon story as well in culinary circles.
- Work with government to reduce red tape and offer funding to help develop new products – marketing funds, tax breaks, fewer rules and regulations (staff housing, etc)
- Focus on nature and purity - the Yukon brand is so strong. Look at Yukon Built (<https://www.yukonbuilt.com>) and YBAR (www.ybarmeats.ca) - do this as a whole territory and celebrate it!

Potential Impact and Outcomes

- Significantly increase inventory of product experiences that are both market-ready and export-ready for national and international travelers.
- Creation of a vibrant downtown core in

Whitehorse, especially the waterfront; this is currently underutilized and could be a signature area of the city used year-round.

- Expand and develop a more diversified product offering that includes agri-tourism, expanded beverage offerings, tours and more.
- Improve the viability of year-round business by driving sales, improving expenditures and hotel occupancy in shoulder and off seasons.
- Support and provide growth, pride and business opportunities (jobs) for Indigenous communities.
- Supporting the expansion of existing events like the bi-annual Moosehide Gathering where tourists eat with locals and learn about Yukon First Nations food and culture
- Creation and the development of world-class, industry-leading festivals and events that showcase the unique attributes of the

Yukon including proximity to nature and its incredible Indigenous culture.

- Potential for increased exports to Alaska and British Columbia (BC) by focusing on value-added products and agricultural products, especially with empty cargo trucks going back to BC.
- Job creation for food artisans, chefs, farmers and more as demand for local products increases. Examples of successful local, world-class businesses currently include Yukon Brewing, Woodcutters Blanket, Wayfarer Oyster House, Inn on the Lake, Air North and more.



MARKETING



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

Key Focus: Marketing

Current State:

- The Yukon is not currently considered a top culinary destination for international visitors and is largely unknown as a food destination, even within the local population.
- Food and beverage have not been a focus for marketing with Tourism Yukon until recently, although they are open to the conversation around how culinary could improve their marketing efforts.
- The Yukon's unique selling propositions for food and beverage are currently neither clearly defined nor publicly presented.
- There is a currently a lack of product to market.

Opportunities & Recommendations

- Due to the lack of regional, national and international awareness of The Yukon as a culinary destination, I would recommend a

strategy that first starts at home. Focus on regional and national markets before you look overseas. Find local brand ambassadors, work with mainstream grocery and other private sector enterprises that reach the mass population – develop a brand that speaks to the locals and increases pride and understanding of Yukon cuisine.

- Create a local strategy focusing on culinary storytelling with social media, print and digital. Engage a staff writer who is knowledgeable and passionate about Yukon cuisine, and focus on the following areas below, but make sure you are telling the stories that are ready to be told – only work with market-ready product.
 - Make farmers and foragers the rock stars (connection to the people)
 - Culturally influenced stories that are unique to the Yukon
 - Use culinary as a garnish to nature-based stories
 - Work with more of the major

grocers on stocking and selling local products with associated storytelling so the general population is immersed in the importance of local products

- Once there is a supply of market-ready product to promote, develop world class key branding, positioning and marketing collateral, websites and guides to culinary tourism experiences that accentuate the natural offering in the Yukon.
- Develop travel trade channels and media kits to support culinary tourism experiences in FAM and media itineraries (Tourism Yukon and the Yukon Convention Bureau are starting/doing this)
- Focus on key positioning to complement other key messages from the Yukon – nature, conferences, hunting, Aurora viewing, etc.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | OPINIONS & RECOMMENDATIONS

- Develop content—stories, images, video/b-roll social media stories; influencer marketing that can easily be shared and mirrors the image you want to portray
- Work with chefs and artisans to create seasonal signature dishes showcasing local, UNIQUE products or techniques
- Do not try and be something to everyone – you are small, celebrate it, be unique and proud of it!
- Create a Yukon Farm Days experience (similar to Alberta but with a unique Yukon feel and flavour) - <https://albertafarmdays.ca>
- Remove “Wild Game” signage from the highway and menus as it is misleading and confusing to consumers and develop standards for culinary tourism signage. Start using specific Yukon farm names, Yukon Born & Raised, etc.

- Hire a centralized (contract) writer to consolidate stories, and share them in a consistent way on all platforms (print, social, web, etc.)

Potential Impact and Outcomes

- The obvious goal of the marketing is to increase the number of visitors, increase the average length of stay in the region, and to increase the average spend on culinary and related products.
- By focusing on being small and being great – rather than trying to be something to everyone – you can direct your marketing spend more effectively and efficiently with a concise plan and focused product offering targeted to key demographics.
- By being small and focused, you can charge a premium for quality products. This will make the industry more sustainable, more profitable and more unique. Currently, the Yukon is an inexpensive destination and it

could be more of a premium experience.

- By showcasing nature and other unique Yukon experiences, you will use food as an accentuator and not a primary driver, which will leverage more opportunities to bring people to the Yukon and stay longer.
- The variety of Indigenous Cultures within the territory provide the most unique potential aspect of the Yukon’s food and beverage story and will provide great traction (look at the successes in New Zealand with Māori cuisine) but remember the importance of only highlighting market-ready products.

ACTION PLAN

Highlights of Recommendations

Goals

- Short Term (Year One)
- Medium Term (Years Two & Three)
- Long Term (Years Four & Five)





RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | ACTION PLAN

Highlights of Recommendations

Organizational Structure

The Yukon has an opportunity to complement its tourism industry with a regional culinary tourism strategy, however, the business of culinary tourism is becoming increasingly competitive thanks to high traveler expectations. Some countries have the advantage of being well-known culinary destinations, for instance, according to the entry and exit reports which Japan carries out, 63% of all its visitors list food as their number one reason for visiting. The Yukon needs to invest in developing a brand position, which will serve to develop culinary products and experiences to attract travelers.

Through the active development of a culinary strategy, The Yukon has the opportunity to identify and better understand its culinary tourism competitive advantage, and then develop and market culinary tourism products

and experiences, especially as an enhancement to its world-class natural experiences and landscape.

Our recommendation is that TIA Yukon follow a five-year strategy, split into three parts:

Years one and two should focus on shifting regulations and creating a solid framework to foster a space where market-ready culinary tourism product can grow and flourish.

Years three and four should focus on cross-industry collaboration and product development.

Year five should have TIA Yukon in a position to shift marketing focus and begin to reap the benefits of solid foundation work creating a destination with local food advocates and ambassadors, collaboration across culinary and tourism industries, market-ready culinary tourism product and tentpole events.

Assuming that TIA Yukon wishes to develop a

regional culinary tourism strategy, the first step is to determine who is going to lead the initiative. We have identified three potential scenarios:

1. TIA Yukon to take on a full leadership role which includes investments in time and financial resources in all aspects of culinary tourism development and management.
2. Developing an arms-length entity such as a public/private partnership or a non-profit with financial and resource support from TIA Yukon, the Territorial Government and Tourism Yukon (as well as other government sectors like CANOR and potentially the private industry).
3. Signalling to the industry which areas require the most focus to support the development of a culinary tourism strategy and leaving it to the industry to lead by forming their own organization to spearhead the sector.



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | ACTION PLAN

Our recommendation would be to go with Option #2, and for partners to agree to a minimum three-to-five-year funding commitment to this organization, which would set it on the correct path to bring about change and take advantage of this sector. The funding support should be sufficient to hire a managing director, a marketing support person as well as financial resources for development pieces such as branding and marketing working with TIA Yukon and other government teams. A minimum operating budget of \$300,000 per annum for the first three years should be the goal to significantly move the needle but this could and should be in cooperation with the agriculture sector.

Marketing and Communications

- Work with an agency or internally to create a brand deck for Yukon cuisine so that everyone is clear on the USPs, key messaging and the look and feel, which can be conveyed consistently, and effectively by

all involved. One of the most important things is to have media-friendly assets in the correct ratio and covering all seasons. Make sure you focus on the unique assets you have and share what makes you different. Share this information with all partners in the Yukon so that everyone is singing from the same songbook. Communication is key.

- Hire a professional writer as a key storyteller (PT to start and move to FT as product develops) and start sharing stories of the people defining the culinary scene from farmers and producers, to chefs and foragers.

Brand Positioning

The Yukon brand, as discussed earlier in the report needs to focus on celebrating nature, diversity and all of the things which make it unique –wild, pristine, Indigenous – but done so in a way that links it to the North. Celebrate nature and the uniqueness of what the region

has to offer, and make sure the marketing and communication plan reflects the brand deck that is created.

You need to start local and build pride in the community. To change the culinary scene in the Yukon, you need to make food important to its people. Food needs to be part of the everyday conversation.

- Sustainability
- Accentuate your natural surroundings
- Quality over quantity – be specialists in what you do —do not try to be something to everyone
- Supporting farmers and foragers to ensure the products are available and of the highest quality
- Showcase your unique taste of place



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | ACTION PLAN

Festival and Event Activation Opportunities

There are many opportunities for festivals and events to showcase the Yukon region, but as per this report, it is important to ensure the background work is done before you start putting too many activations in place. Food festivals and events dominate almost every marketplace globally now and almost all of them have the same formatting and style: guest chefs, cooking demos, consumer tastings, large crowds. Events such as the Yukon Culinary Festival follow that format, and after having curated it and attended it for many years, I think there are opportunities for improvement with long-term funding and support.

The Yukon should be small and casual but with exceptionally high quality. You want to attract the world's foodies, but that category of traveller has "been there and done that". Give them something different and showcase the Yukon for its unique attributes, which in my mind include wild game and foraged foods, as well as Indigenous influences.

Look at enhancing the successful Yukon Culinary Festival with a goal of making global lists with

product such as the Wildfoods Festival in Hokitika, NZ

<https://www.cnn.com/travel/article/worlds-best-food-festivals/index.html>

Local Economic Development

As outlined in the initial pages of this report, culinary tourism can have a significant impact on the local economy; tourists eat out an average of three times a day, so the impacts can be profound, both from an economic and job creation standpoint, but also from an influence perspective.

Some examples include:

<https://globallocalgourmet.com/project/culinary-tourism-economic-development/>

<http://www.hortnz.co.nz/assets/Deloitte/New-Zealands-food-story-The-Pukekohe-hub.pdf>

<https://www.eturbonews.com/247136/1-million-visitors-and-us800-million-earned-in-9-weeks>

Some of the ideas that I think the Yukon can draw inspiration from to increase economic impact beyond the food and beverage sector and filter back to the agricultural side would

include events like "Meet Your Maker" or "Farm Days" where you can engage the local industry and population and make food and its stories more important to them. These events can showcase local farmers and producers and will get people to outlying regions to discover what is in their own backyard.

Connecting locals to their own food stories also has the effect of making them both ambassadors for and champions of the Yukon's culinary brand. These events can then lead to the development of agri-tourism products for visitors, which will have even more economic impact.

Further examples:

<https://albertafarmdays.ca>

<http://firstweeat.ca/2019/01/18/meet-your-maker/>

<https://www.forbes.com/sites/lizazimmerman/2019/03/18/michelin-to-introduce-a-restaurant-guide-to-the-state-of-california/#58f842df4310>

<https://www.eturbonews.com/247725/bartlett-tourism-driving-economic-growth-through-events-and-experiential-activities>



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | ACTION PLAN

Innovation

Innovation in the culinary sector offers many opportunities for both the public and private sector including everything from product development and land reform to new tourism-based initiatives.

The Yukon has a great opportunity to use its natural geography to be innovative when it comes to land development of new areas, the hosting of festivals, and in creating new culinary tourism products in the agri-tourism space.

Some examples of innovative ideas include:

<https://www.prnewswire.com/news-releases/the-pretty-fork-announces-destination-dining-seattle-a-culinary-and-travel-experience-in-the-pacific-northwest-300810073.html>

<http://travellingfoody.com/dining-on-ice-at-the-snowking-castle/>

<https://www.foodswinesfromspain.com/spanishfoodwine/global/w-hats-new/news/new-detail/global-gastronomy-tourism-competition.html>

<https://www.forbes.com/sites/annabel/2017/03/13/eat-the-world-9-best-food-tours/#685ad1947190>

<https://morningchores.com/ideas-for-agritourism/>

Education, Skills and Talent Development

Based on meetings with industry in the Yukon, and also from my other work internationally, it's clear that one of the biggest challenges facing the culinary and tourism sectors globally is a significant staff shortage. It is a major problem right now in the Yukon, but there are many examples of restaurants in the Yukon (and around the world) that are now closing, running reduced hours or menus or even moving to automated service models due to the staff shortages. The disturbing part of this is that tourism is predicted to continue growing at a record pace and if we do not solve these staffing issues now, this will be a continued conversation for many years to come.

In my opinion, the biggest challenge The Yukon faces is front of house staffing, which will require government intervention to solve and this should be a top priority based on the recommendations from this report.

There is also an opportunity to create or facilitate the creation of a staff pooling system where restaurants can share staff (both FOH and BOH) and try and create a more viable industry for service

staff (with consistency of hours).

Evaluate the opportunity to work with local Indigenous communities to train and mentor staff and provide them with jobs in the industry.

Indigenous Development

The diversity of Indigenous Cultures offers incredible potential for the Yukon to differentiate itself and create a unique culinary tourism brand. The challenge is, there is very little market-ready product currently available in this space.

Embrace the territory's Indigenous and trade route history and culture and put money and resources (people) into developing this sector and helping them share their stories. This is a significant unique selling proposition for the Yukon, and it should be the foundation of your story.

Ideas for this include:

- Community workshops in outlying communities to engage youth, capture stories



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- Work with government (health) to reduce or minimize restrictions on dining in Indigenous homes and communities (AirBnB model for dining experiences)
- Workshops and video contests with youth to capture and engage (and pass down) Indigenous stories, recipes, traditions, etc.
- Create a celebration each month featuring something from the wild that provides a unique taste of the Yukon (and give people a reason to come outside of the summer season) – moose, caribou/elk, morels, fireweed, honey, highbush cranberry, spruce, etc.
- Work with hunters, foragers, markets, restaurants to showcase these unique ingredients and flavours.
 - This will help teach respect for the land, conserve resources and educate all at the same time as driving tourism both inside and from outside the territory
- Work with Air North to showcase these products inflight where possible
- Work with the local school district to implement a curriculum or learning about the culinary history and flavours from Indigenous elders and get the youth excited about food building on ideas such as the school hunts like this:
<https://www.cbc.ca/news/canada/north/hunt-youth-high-school-bison-yukon-1.5135867>
- Look for inspiration from chefs like Monique Fiso in Wellington, NZ (<https://www.hiakai.co.nz>) who are shining a spotlight on their respective Indigenous cuisines and culture, and even organizations like Air New Zealand who have significant Maori influence on their programming, which is something visitors crave.
- By leveraging the direct and indirect benefits that growing culinary tourism will have on the Yukon, issues such as northern

food security/food sovereignty can be addressed as well as climate change mitigation.

Other examples include:

<https://indigenoustourism.ca/en/indigenous-cuisine-from-coast-to-coast-to-coast/>

<https://www.resilience.org/stories/2019-02-08/aboriginal-foodways-towards-a-return-of-native-food-in-australia/>

I suggest this area of development be a top priority in the product development and educational space.



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Explore and Identify Key Strategic Partnerships

Partnerships are key in leveraging not only dollars, but experience and marketing reach. This recent example from Denmark of an educational centre with a non-profit partner, is the type of opportunity that is taking place in other developing food countries and the Yukon has the opportunity to create similar partnerships, especially within the Indigenous space.

<https://www.nytimes.com/2019/03/12/dining/denmark-mad-culinary-academy.html>

Partnerships with industry are also highly effective, by using them to leverage media reach and do their own storytelling helps elevate the brand.

<https://vancouver.sun.com/travel/local-travel/forage-fish-and-feast-land-to-table-in-tofino>

<https://www.visainfinite.ca/infinite/>

<https://experience.porsche.com/en/travel/events-and-services/travel-experience-2019>

For the Yukon, given the immense importance of connecting with the local population first, I would like to see partnerships with mainstream grocery stores and also with primary education facilities. One of the best ways to change a culture is with youth (as they influence their parents' buying decisions and will be the consumers of tomorrow; we are seeing it with millennials who care about where their food comes from and are asking the right questions.

Here are some programs that have been successful in other parts of the world:

<https://www.growingchefs.ca>

<https://www.jamieoliver.com/features/how-to-get-involved-with-food-revolution-day/>

<https://www.epicurious.com/expert-advice/kids-cooking-classes-elementary-school-article>

<http://nymag.com/travel/article/the-best-tourist-secret-attraction-is-the-grocery-store.html>

<https://ontarioculinary.com/localize-coming-to-a-grocery-store-near-you/>





GOALS



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | ACTION PLAN

SHORT TERM GOALS (YEAR ONE)

- Finalize payment for 2019/20 to TIAY
- Achieve a multi-year funding model (3-5 years minimum) with financial engagement from Tourism, Ec Dev, Agriculture, Education, and Indigenous, as well as private sector partners such as Air North, NVD, Independent, etc
- Formalize an operating team and structure with a scope of work and priorities based on 3-5 year plan
- Educational Plan for K-12 and college
- New 12-month calendar of activations (likely starting in fall or winter 2020 depending on how long the first 3 items take)
- Private sector led events - SSK, Foraging, etc.
- Explore events or activations in key outlying communities

- Restaurant Challenge - monthly themes - morel month, fireweed, spruce tip, etc. (Similar set up to the Mac & Cheese and Burger Challenges, but with local, in season ingredients)
- Have a YCF booth at the Lake Labarge Lions trade show to showcase and educate locals (May)
- Meet Your Maker for the public tied to an existing event like Lions Trade Show, Rendezvous, Spruce Bog.

MEDIUM TERM GOALS (YEARS TWO & THREE)

- Focus on Collaboration and Product Development
- Wild Game / Farmed Game Strategy
- Highway Signage Updated
- Sit down with Environmental Health - eating in Indigenous Homes, making business

easier

- Reducing red tape with government
- Product development workshops in all communities
- Farm Days Activation like Alberta
- Farm field trips for all schools (K-12)
- At home meal kits promoting local food
- Climate change and food security initiatives
- Air North - Indigenous menu one month a year
- Expand private sector events
- Encourage Department of Agriculture to host a second North of 60 Agricultural Banquet for the public.
- Weekly activations at Independent and Fireweed Market with local chefs



RECOMMENDATIONS FOR A YUKON CULINARY STRATEGY | ACTION PLAN

- Encourage Wykes to host their local vendor fair from twice a year to four times a year.
- Articles - “How to write a year round menu showcasing local?”, etc
- Look at a business plan for a year-round Fireweed Market
- Activation of Dining Festivals (Burger Month, DOY, etc)

Facilitate Partnerships -

- Sponsor a food focused film at the Available Light Film Festival (February)
- First Light Photography festival - food component/food photography?
- Overland Yukon (Groceries, Recipe Books)
- Budget Car Rental - Culinary Guide Book
- Outfitters
- River Guides
- Trappers Association

- Tourism Yukon & Yukon Convention Bureau FAM tours to ensure culinary is part of the program (this exists, but more can be done as new products come on the market)
- YFNCT - will be launching in March, “Yukon Moments” similar to AirBNB experiences where consumers can book experiences with Indigenous businesses
- Adaka - partner with them for their community feast
- Rendezvous - it’s a huge winter festival with many events and dinners. Can we convince someone (not me!) to run for the Yukon Culinary Festival Queen!?
- Caribou Crossing Trading Post. During their summer operation, May - September they see over 500 people (if not more) in a day from the Skagway cruise ships. How can we motivate them to buy and highlight local?
- Start working on a dedicated marketing strategy for Year 4 and 5

- Distribution planning from outlying communities
- Export product plan for farmers, artisans, producers (work with trucking companies on cheap rates to fill empty trucks)
- CFIA certified plant for product processing
- CFIA certified L’Abattoir

LONG TERM (YEARS FOUR & FIVE)

- Continued Product Development
- With continued product development creating a Yukon culinary route/trail or culinary passport program (similar to the Yukon Heritage sites program that already exists, but for food)
http://www.tc.gov.yk.ca/explorers_passport.html
- Full blown marketing strategy
- Annual calendar is filled with events every month