

TIA Yukon Submission to the Yukon Tourism Development Strategy
May 2018

Introduction: The Yukon Tourism Development Strategy

Tourism in the Yukon would not exist without its tourism operators. These individuals have devoted their lives and a significant amount of capital from their own pockets to develop the products and services over the past few decades that have made the Yukon a viable destination. It takes a considerable amount of passion and perseverance to do this.

When developing the strategy that will determine how tourism is planned and managed in the territory for the years to come, it stands to reason that those individuals who live and breathe tourism every day and who have the most ‘skin in the game’, should have the greatest influence on such a plan. After all, this plan sets out to shape the industry that they have created – their very livelihood. The Yukon Tourism Development Strategy (YTDS) Steering Committee has a number of tourism operators on it, which adds an essential industry perspective when reviewing the YTDS outputs at a higher level, however, TIA Yukon believes it tactful to bring forward as many insights from the tourism industry as possible to help ensure that these details are considered when developing the draft strategy.

TIA Yukon makes this submission to the Yukon Tourism Development Strategy on behalf of the Yukon’s tourism industry. TIA Yukon would like to thank the Government of the Yukon for the opportunity to contribute this submission to the Yukon Tourism Development Strategy and appreciates the hard work that has been undertaken on this initiative.

Acknowledgement

It is with great respect and gratitude that TIA Yukon recognizes the Yukon’s First Nations, who allow their traditional lands to be shared and enjoyed by visitors. The Yukon’s tourism industry continues to be a strong advocate of environmental stewardship alongside its First Nation partners, and a proud supporter of Yukon First Nation efforts to promote their culture through tourism.

TIA Yukon’s Mission Statement

TIA Yukon is the visitor industry association forging a common voice and actions to influence, promote and assist the development of tourism in the Yukon. The core values of our Association are to be: Accessible, Accountable, Transparent, and Sustainable.

TIA Yukon's Core Values were established in 1973 by the Yukon's tourism industry, for the Yukon's tourism industry. They continue to endure to this day. TIA Yukon asserts that these same values should be ingrained into all systems and processes that shape and govern tourism in the Yukon.

Industry's Mission Statement

The goal of the Yukon's tourism industry is to generate revenue from those traveling to the Yukon and within the Yukon in order to create financial sustainability for tourism businesses, so as to distinguish tourism as one of the main economic drivers of the territory.

The industry strives to make the Yukon a year round destination and to promote and preserve the qualities of the Yukon that make it unique: its culture, its history, its pristine environment, and the dynamics of its communities.

WHERE ARE WE NOW?

SWOT Analysis

Based on feedback from TIA Yukon members over the past year (May/17-May 18), these are some of the key perceptions about the current state of tourism in the Yukon that should be noted:

STRENGTHS

- Funding programs that help the industry (TCMF, Ec. Dev.)
- Yukon Now Campaign
- Partnerships within industry
- Air North's Yukon presence means access to good flights and competitive rates
- Strong sense of community and a small jurisdiction – easier to rally Yukoners around a campaign or cause (easier to congregate to plan compared to ON, BC, etc.)
- Multitude of NGOs reflects diversity of the Yukon's tourism industry and strengthens each sector
- The Yukon has a strong brand that continues to endure

WEAKNESSES

- Communication from Tourism Yukon to industry
- Research conducted by Tourism Yukon is often considered unreliable due to collection challenges and lack of independent oversight and is often at odds with the reports of operators
- Tedious reporting requirements and/or outdated criteria that do not allow for flexibility

- Lack of standards and regulations
- Staffing challenges
- Lack of infrastructure upgrades (better signage, more outhouses, more garbage bins, better/cheaper internet, etc.)
- Poor management of Yukon airports (lack of policies, lack of service standards, deterioration of infrastructure, government run design does not maximize opportunities for consumer services and spending, etc.)
- No high end accommodations
- Low availability of accommodation during peak season
- Low quality of some offered products and services
- Poor customer service
- Difficult to access capital
- Difficult to access land
- Slow decisions related to land use conflicts (ie. Takhini Hot Springs)
- Many outdated YG policies/products are having a negative impact on efficiency and/or image: FAM tour policy, 'As the Crow Flies' VIC film, vacation planner, etc.
- Road maintenance in general is very poor; road conditions on North Klondike limits RV travel to Dawson
- Whitehorse has no specific tourism rep and is not developed as a destination – lacks products and services, especially in the evenings
- Multitude of tourism NGOs can be a drain on the talent pool when it comes to populating boards and committees

OPPORTUNITIES

- Room for growth in regards to offering of products and services and improving existing products and services
- New Air North flight routes and increased access from paving of the Dawson runway
- Growth of winter tourism (recent increases in new markets: Mexico, Australia)
- Opportunity to use VIC in an innovative way to maximize use
- Opportunity for the Yukon to capitalize on visitor interest in sustainable travel and destination sustainability
- Yukon College's transition to Yukon University could lead to training and experiential opportunities
- Niche experiences such as culinary, astronomy, and paleontology are being developed and gaining interest
- Recent interest from Yukon First Nations in developing tourism, could lead to great opportunities for new tourism products, services, and experiences
- Impact of political decisions (ie. easier for some nationalities to obtain a VISA for Canada; greater interest in Canadians seeing Canada).
- Shoulder season capacity remains (albeit much smaller than 10 years ago).

THREATS

- Lack of capacity (especially in communities)
- Impacts of climate change means greater chances of severe weather and natural disasters (fires, floods, etc.)
- Impact of political factors (ie. economic uncertainty)
- Rising cost of fuel and other travel costs
- Lack of succession planning could lead to reduction in products and services, and be a detriment to industry sustainability
- Cuts to tourism marketing and infrastructure (ie. ferries) in Alaska
- Perception that tourism is now 'bureaucracy led', and no longer 'industry led' due to assumptions made by YG as a result of Tourism Yukon-Industry disconnect – this causes strain in relationships and worsens gaps in communications

WHERE ARE WE GOING?

Industry's Vision and Map for Growth

The Yukon will become a leader in northern experiential and educational tourism, evolving into a boutique, year round destination that each Canadian will feel the need to visit at least once in their lifetime. Sustainability will be the core guiding principle of tourism in the Yukon; revenue generation and community development will be its primary goals and these must be intertwined. The Yukon will create a well-rounded narrative by leveraging the things that make it one of a kind, in particular, its culture, and its sense of community. It will develop iconic attractions and unique experiences that allow it to stand out from its competitors; and will be creative and resourceful in finding new ways to tell its story.

Targets

- Reach the target of 3% growth in tourism revenue each year for the territory
- Increase visitor spend from Canadians (non-Yukon residents) by 2% each year
- Reach the target of 1% tourism related job growth in the territory each year
- Develop a mechanism for accurately measuring tourism revenues in Yukon communities and have it in place before March 31, 2019

HOW WILL WE GET THERE?

Make sustainability more than just a buzz-word

Destinations like Costa Rica have incorporated sustainability into their long term tourism strategies. More than this, they have made sustainability part of their

identity. It's working.¹ Many travelers these days value the opportunity to give back to the places they visit – the rise of voluntourism and eco-tourism are key indicators of this. Businesses and destinations that can demonstrate that they have adopted sustainable best practices are seen as being conscientious, forward thinking, and are often considered higher quality.² From a practical point of view, destinations and businesses that focus on sustainability save money and time in the long term. Once the initial investments are made, it creates certainty, requiring less time, energy and money to keep things running consistently.³

TIA Yukon designed its 2017 conference around the theme 'Sustainable tourism N60 and Beyond'. This was done to recognize the fact that 2017 was the International Year of Sustainable Tourism for Development, and to encourage the Yukon's tourism industry to start thinking about sustainability in our region. A few months later, in Victoria, BC the IMPACT conference was held to facilitate the first national discussion on sustainable tourism in Canada. Both conferences highlighted the fact that tourism is at a pivotal point – more people around the world are traveling than ever before. With terms like 'overtourism' becoming more widely used, many believe that increases in volume should not be the defining measure of tourism success (according to a March 2018 TIA Yukon survey, 90% of the respondents felt that visitor spend was a better or equal indicator of success). As highlighted in the presentations delivered at the TIA Yukon conference by the Consul General of Costa Rica, and a former Destination Manager from Norway, global tourism leaders are seeing the benefits in shifting their focus from quantity of visitors that a destination can bring in, to the quality of experience that they can offer visitors (which tends to lead to guests that stay longer and spend more).⁴ Investing in higher quality experiences generally leads to more investment in communities, and more positive and meaningful interaction between residents and visitors.⁵

To maximize the Yukon's tourism potential, sustainability needs to be the fundamental guiding principle that influences all decisions. This means ensuring that tourism is developed to ensure that it is economically, environmentally, culturally, and socially sustainable.

QUESTIONS TO CONSIDER

- *How can we plan accordingly to ensure that the number of visitors does not exceed the capacity of our communities?*

¹ SKAL. <https://www.skal.org>. (May, 2016). Why Going Green Pays Off.

² Tourism Industry Association of New Zealand. <http://www.tourism2025.org.nz> (March, 2014). Tourism 2025.

³ Destination British Columbia. <https://www.destinationbc.ca>. (December, 2015). Tourism Business Essentials: Sustainable Tourism.

⁴ www.tiayukon.com. See *Industry Resources*

⁵ Ferlaine, Jessica. <https://www.businessinfocusmagazine.com>. (May, 2014). Tourism and Its Many Benefits.

- *How do we increase tourism revenue while ensuring that the quality of the things that make the territory appealing as a destination aren't diminished by the volume of people passing through the territory?*
- *How do we leverage tourism to provide maximum benefit for the Yukon's communities, and how can the communities contribute to growing tourism revenue?*
- *Given that visitation from China to Canada has been experiencing astronomical growth year over year (40-50%) and that other provinces that have pursued the China market have also experienced similar increases, is the Yukon equipped to absorb this kind of volume without having it affect the quality of the destination?*
- *How can we properly address the issues that are being reported regarding a lack of capacity (accommodations, staffing, community infrastructure, etc) in a sustainable way so as to ensure that the Yukon's tourism industry continues to thrive?*

RECOMMENDED ACTION

- *Strategies need to be created to ensure that each of the four pillars of sustainability (economic, environmental, cultural, and social) are well developed and managed. A joint YG-industry committee should be established to monitor progress, advise, and consistently develop these pillars.*
- *YG needs to invest in an established set of sustainability criteria that is globally recognized, such as EarthCheck or Green Key, and have a designated position working towards becoming certified by one of these bodies. Thompson Okanagan Tourism Association (TOTA) should be used as a reference in this regard.*
- *The United Nations Goals for Sustainability should be incorporated into the Strategic Plan:*
<https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

Acknowledge the Leading Role of Industry

In today's world, things move quickly, and they're only getting faster. Travel trends are changing and the Yukon needs to be able to adapt swiftly if we want to stay ahead of the curve.

There's a saying: organizations are either speedboats or aircraft carriers. For illustrative purposes: those who work in the world of business and NGOs in the Yukon, are the speed boats on the sea, their smaller size makes them more susceptible to the waves that may come, but provides them with the ability to be nimble and maneuver quickly when needed. As an aircraft carrier, the Yukon Government has the capacity to absorb whatever impact rough waters may bring, but to plot a new course takes all hands on deck and is a lengthy process.

Sometimes, when working together, the differences between these two types of organizations can lead to tensions.

Picture this: a fleet of speedboats in the water ahead of the aircraft carrier notice a shallow reef that doesn't appear on any maps. The aircraft carrier is moving straight towards it - if struck, the reef would cause considerable damage to the ship. The speedboats radio the command of the large vessel and inform them of their findings. Command disregards the warnings, putting more trust in its outdated maps and the thick hull of their ship than the observations of those patrolling the waters ahead. The speedboats desperately sound their horns, but far above them on the bridge of the aircraft carrier, the commanding officers continue to order the aircraft carrier to maintain its course, believing that they know better.

Tourism Yukon has done some great things to promote the Yukon, in particular the Yukon Now initiative that began advertising the Yukon on television in 2015, and assisting operators with showcasing their businesses and developing product through the Product Development Partnership Program (PDPP) and the Tourism Cooperative Marketing Fund (TCMF). There is good work done at Tourism Yukon, but because it is a large vessel powered by bureaucracy, it moves slowly. It moves too slowly to fulfill all of the needs of the industry. Evidence of this can be found in outdated policies and products: the film at the Whitehorse VIC that's over 20 years old (*As the Crow Flies*), the vacation planner, FAM tour policy, criteria for the TCMF - to date, none of these items have had tangible updates delivered, even though they've appeared as SMAC recommendations - some of them, several times, and many of them, over a span of several years. If these internal changes take this long to action, how much chance does Tourism Yukon have of adapting to external changes quickly, such as visitor trends?

Tourism Yukon needs to trust the industry experts. These players have invested their own money into ventures and their success speaks for itself. These individuals know where the key opportunities are and where they will be because they are on the ground, carefully investing their own dollars where they see the best returns. This is why tourism marketing in the Yukon needs to return to being 'industry led'. An aircraft carrier can accomplish a lot, but it can't be a speedboat. It's not supposed to be. The best results come from each party knowing their strengths, defining their roles based on their strengths, and having faith that they'll support one another in these roles for the benefit of all parties. This is the foundation of a solid partnership.

To allow tourism in the Yukon to reach peak performance, a new governance model needs to be implemented that enables tourism to be truly industry led, with government in a supportive role.

RECOMMENDED ACTION:

- *Restore the term 'Industry Led' to Tourism Yukon's mission statement so that it is clear that marketing decisions are being made based on the needs of the industry and not on the inclinations of the bureaucracy.*
- *Revise the SMAC ToR to reformat the committee so that it is co-chaired, by a representative of TIA Yukon and the Deputy Minister of Tourism and Culture. TIA Yukon would continue to be responsible for the administration of the committee, and recommendations would continue to be passed from the committee to the TIA Yukon Board, and onto the Minister of Tourism and Culture. The Minister and TIA Yukon Chair would have a standing offer to participate in any SMAC meetings and would be invited to join the SMAC for lunch during each session.*
- *Acknowledge that the Yukon tourism industry is growing to a level that will benefit from the path other jurisdictions have taken: the Yukon should form an industry-led crown corporation to manage the marketing of tourism in the territory.*

Create the Right Climate for Investment

One of the main challenges with the Yukon today, is that the conditions are not ideal for starting or growing a tourism business.

Access to land presents a challenge for some would-be operators that want to create a medium to large scale enterprise or expand their existing operations. This comes as a surprise for many, given the number of vacant lots, open spaces, and the sheer size of the territory.

Access to capital is another common challenge for start-up businesses and those looking to grow. Banks are often unwilling to finance tourism ventures without a substantial down payment up front. Foreign investors and co-op type arrangements require more certainty that an operation will be turn-key before investors make a commitment.

Tourism infrastructure is badly in need of being installed or upgraded. Internet and cell service throughout the Yukon needs to be enhanced, aging airports and runways need to be improved, roads need to be upgraded to accommodate more traffic and bigger vehicles, and more visitors means that the Yukon Government needs to provide and maintain more portable toilets and garbage cans, especially in the rural areas near communities.

One of the root causes of the challenges that operators face is the fact that some tourism regulations and policies that were designed years ago, are outdated and do not address current realities. For example, when some of the existing tourism policies were put into effect, winter tourism was not a factor and the Yukon received far fewer visitors than it currently does. While some of the existing

policies and regulations risk tying up potential investors in red tape, others are creating loopholes that allow fly-by-night businesses to operate under the radar without fear of reprisal.⁶

QUESTIONS TO CONSIDER:

- *How can we attract investment in tourism operations to Yukon without creating an unlevel playing field for those that are here?*
- *What would be the best way to stimulate iconic product development?*
- *How do we create investment tax incentives to encourage investment in tourism in the territory while continuing to prevent taxes such as airport and hotel taxes that would make the region uncompetitive?*

RECOMMENDED ACTION:

- *YG should coordinate a quarterly meeting to allow for face-to-face free-flowing dialogue between the Deputy Ministers of Tourism and Culture, Community Services, Environment, Economic Development, and Highways and Public Works, City Managers/CAOs of Yukon Municipalities, TIA Yukon, the Association of Yukon Communities, and the Yukon Chamber of Commerce. These meetings should specifically discuss infrastructure needs in the territory to ensure we have enough capacity to accommodate increases in visitation, and that we are working in unison to make the territory attractive for visitors and potential tourism investors.*
- *YG should earmark a portion of the new federal infrastructure funding it is receiving and allocate this to an annual tourism support fund (ie. infrastructure projects that will stand to benefit tourism in the territory). These projects do not have to only focus on tourism, but in the rationale for the investment it should be highlighted how the projects will benefit the industry.*
- *YG (Economic Development and Tourism & Culture) should fund a 'Yukon Tourism Investment Committee' administered by TIA Yukon, to conduct research into tourism investment attraction, best practices in product development, feasibility studies for potential iconic product, as well as developing tools and recommendations that would assist in attracting more local and foreign investors, and ultimately the creation of new, high end (\$1 million +) tourism product in the Yukon.*
- *A tourism investment policy should be put in place by YG, to ensure that we are adhering to global best practices, creating clear guidelines that set out to attract reputable investors that give back to the community, and give preference to investors with a local connection as opposed to foreign owned entities.*
- *All current policies and regulations relating to tourism (especially those pertaining to wilderness tourism) should be properly enforced by YG. Government and industry should work to develop communication*

⁶ www.tiayukon.com. See Industry Resources

strategies to educate people about existing policies and regulations. Policies should be reviewed frequently by YG, in concert with TIA Yukon and WTAY, to ensure existing regulations are meeting the current need.

Celebrate our uniqueness & experience it through the eyes of visitors

The Yukon must leverage the things that make it one of a kind, to create a well-rounded story that both intrigues and inspires. Yukon First Nations culture, culinary tourism, the Klondike history, Air North, and untouched wilderness are all parts of this narrative. The colourful personalities that exist in the Yukon are part of who we are; the strong sense of community that brings so much diversity together is truly something special that leaves a lasting impression on visitors.

The Yukon has the potential to carve out a niche as a leader in northern experiential and educational tourism. The mysticism of the Yukon lends itself to peaking curiosity; the fact that there is so much public interest in the North these days presents a great opportunity for the Yukon's tourism community to pursue. Through strategic partnerships and programming, we can find ways to draw people to the Yukon, not just to see the territory, but to fully learn about it and experience it. Several organizations already do a great job with interpretation – we should find ways to interconnect to maximize the visitor learning experience. The tourism community should work to weave lessons about the unique aspects of the Yukon so that visitors are learning about the Yukon from the moment they arrive to the moment they depart. Themes that would provide great 'teachable moments' would include (but not be limited to) climate change, wildlife conservation, outfitting and trapping, outdoor survival, First Nation self-government, Yukon culinary and agriculture, and astronomy. This would create a real connection between the visitor and the destination, arming them with accurate information that they could bring home with them to inform and intrigue others. When people connect with a destination, they tend to care more about it.⁷

During the Gold Rush, people had to find ways to survive against the harsh climate and make a living if they didn't strike it rich. This kind of creativity and adaptability are traits commonly found in the Yukon to this day. The tourism community needs to take risks and try new things. Niche sectors like health tourism, educational tourism, volun-tourism, and other unconventional areas should be explored. Let no stone go unturned – that's where the gold is hiding.

RECOMMENDED ACTION

⁷ Hosany, Sameer; Prayag, Girish; Deesilatham, Siripan; and Odeh, Khaled. http://scholarworks.umass.edu/ttra/2013/AcademicPapers_Oral/9 (2016). "Measuring Tourists' Emotional Experiences: Further Validation of the Destination Emotion Scale". Tourism Travel and Research Association: Advancing Tourism Research Globally.

- *SMAC and Tourism Yukon should identify a list of potential learning opportunities for visitors and articulate ways that strategic programming could be implemented.*
- *SMAC and Tourism Yukon should jointly develop strategies to better appeal to and enhance the visitor experience for Visiting Friends and Relatives (VFR) and Fully Independent Travelers (FIT)*
- *TIA Yukon and Tourism Yukon should develop a closer working relationship with Yukon College to see if there are opportunities for experiential learning for visitors that could be developed, such as through the Cold Climate Innovation Centre.*

Use our resources more effectively

The Yukon is a remote destination with a small population. Human and capital resources are limited. We therefore need to look at ways that things could be streamlined to create better alignments and efficiencies to make operations more seamless.

Industry has noted that the hard working staff at Tourism Yukon are often overwhelmed with the amount of work on their plates. This is largely regarded as being the result of the department's wide ranging activities: not necessarily work that it has been tasked to manage but an increased load that it has created for itself over time. This build up is common in organizations, as it accumulates incrementally over time. The perception from industry is that Tourism Yukon is stretched too thin. The answer is not encouraging more government bloat by creating new positions to fill; the answer, in industry's view, is for Tourism Yukon to scale back its activities and to concentrate its attention on fewer things. The less things on which to focus, the more focus that can be put on them.

There are a number of tourism NGOs that operate in the territory, funded in part by government. These NGOs provide services to tourism operators and groups who make up the various sectors of the tourism industry. TIA Yukon is one such organization. Many of these NGOs have existed for decades and formed to fill a need. As the tourism industry evolved, so did these needs, and several groups were created to foster and support specific sectors. All of the relevant tourism NGOs have loyal memberships and boards made up of hardworking volunteers from the industry. Given the number of NGOs and the length of time that they've been in operation, it would be wise for the industry to review the mandates of each organization to avoid duplication, and to identify opportunities for streamlining through possible mergers or cost sharing of resources. This could help create efficiencies with budgets and volunteer time.

QUESTIONS TO CONSIDER

- *Is the Yukon in too many markets?*
- *How does Tourism Yukon rationalize which markets to pursue?*

- *Are there assets and/or responsibilities that Tourism Yukon could download to tourism NGOs?*
- *Are there opportunities for tourism NGOs to amalgamate and/or cost share?*
- *Do some NGO mandates need to be expanded to adapt to current needs?*

RECOMMENDED ACTION

- *Tourism Yukon should request an independent analysis be conducted on the effectiveness of their current marketing strategy, and a cost benefit analysis for reducing the number of markets in which they are present*
- *TIA Yukon in partnership with its NGO partners should access funding for an independent analysis of the tourism NGO community to identify gaps, duplication, possible opportunities for cost sharing and/or mergers, and recommend possible responsibilities currently undertaken by YG that may make sense to transfer to certain NGOs.*

Make Staffing & Succession Planning a Priority

Across Canada, tourism labour needs continue to rise, and reliable, skilled workers are getting more difficult to find. The Yukon is no exception. Tourism businesses are not able to properly operate without qualified employees, and while government programs like the Temporary Foreign Worker Program (federal) and the Yukon Nominee Program (territorial) are working for some, the fact is that there is a global shortage of tourism and hospitality employees. Estimates show that this issue is expected to get worse.

In the Yukon challenges to recruit and retain staff are often exacerbated by a lack of affordable housing, especially in communities like Dawson.

Adding to the complexity of this challenge, many tourism operators in the Yukon don't have a succession plan in place for their business. This means that when it comes time to pass the torch onto a successor, it could result in knowledge and experience being lost in the transfer, operators being stuck in a perpetual holding pattern of not being able to cash out on their life's work, and potentially lost product from the market. This is a serious concern in a small region during a time when less people are getting into the industry.

QUESTIONS TO CONSIDER

- *How can we encourage more Yukoners to pursue a career in tourism and hospitality?*

RECOMMENDED ACTION

- *The Yukon's tourism community should consider staffing to be as important as the other fundamental parts of tourism: access, product, and marketing.*
- *YG should provide funding for TIA Yukon to create a campaign to recruit and retain qualified tourism employees from other parts of Canada. The campaign could include the development of promotional material showcasing the Yukon as a great place to live and work.*
- *Efforts should be made by TIA Yukon and supported by YG to help operators learn more about succession planning and to create opportunities for industry mentorship and professional development.*

Make decisions based on reliable and transparent research

Good decisions are based on good research. In order for research to be determined to be reliable, the process by which it is collected needs to be trusted. If there is no transparency, there is no trust.

In order for the Yukon's tourism industry to have faith in research developed by Tourism Yukon pertaining to the industry, the process must be able to be tracked and understood, and results must be fully accessible.

For success to be measurable, benchmarks need to be defined well in advance so that results have something with which to be compared.

Conflicts of interest for those conducting research, should always be taken into account. Checks and balances need to be in place to prevent both real and perceived conflicts. When it comes to research, especially research conducted in a small community, perception can be more powerful than reality.

Going forward, the Yukon's tourism success should be measured mostly through visitor spend, length of stay, and impact on the Yukon's communities, with visitation numbers being a much smaller piece of the equation. Key performance indicators must be clear, set well in advance, and research must be objective.

QUESTIONS TO CONSIDER

- If research is being conducted internally that would directly influence department policy and/or departmental performance measures could the department's interests lead to a compromise in the integrity of the research?
- Why isn't TIA Yukon or SMAC asked to contribute questions that would be of interest to industry so that they can be included in studies like the Visitor Exit Survey, as has been done in the past?
- Did Tourism Yukon base its decision to invest marketing dollars in the China market on data indicating that this decision would be in line with the interests of industry?

RECOMMENDED ACTION

- *Tourism Yukon should second a research analyst to TIA Yukon so that research on the Yukon's tourism industry is conducted as a joint process between industry and government. This would allow more oversight and subsequently prevent perceived conflicts of interest, which would restore industry trust in the process and lead to more industry buy in.*
- *On major research projects where perceived conflicts of interest are a factor, Tourism Yukon should hire a third party contractor to take the lead to ensure objectivity.*

Break down silos and fill gaps by renovating outdated structures

Communication from Tourism Yukon to industry needs to be greatly improved. Initiatives are often launched without industry having been consulted beforehand, and sometimes, key industry players are not even informed afterwards. Information that goes to some industry groups, doesn't make it to others. Concerns that are raised by operators, often do not receive follow up unless they are repeated or TIA Yukon is engaged, and even when this happens things often drag on or are left unresolved.

In addition to this, communication between key government departments responsible for overseeing aspects of tourism (ie. Environment, Highways & Public Works, Education, Economic Development, and Tourism and Culture) has been in disarray for years. Even Tourism Yukon and the Culture branch, though both under the same Department, and even under the same roof, have reportedly had issues in this regard. The left hand doesn't know what the right hand is doing.

YG has a communications problem. Because Tourism Yukon relies on working with multiple partners internally, with industry, and with other government bodies, the issue is especially evident, and problematic in this department. Because communication is so important to maintaining healthy relationships, partnerships between Tourism Yukon and industry have become strained more frequently in the past few years.

One of the underlying challenges that is amplified by the breakdown in communications, is the division between tourism and culture that exists in the Yukon. Many on the industry side would say that Tourism Yukon doesn't do enough to promote culture. The programs at Tourism Yukon and Economic Development often don't accommodate the needs from the arts and culture sector. Many culture based organizations don't believe that they have a strong enough voice because they aren't able to move things forward to the extent that they want to given the current structures that are in place. This is something that TIA Yukon can help to enhance. A substantial reorganization of the current system could create efficiencies that would revitalize communication and provide more focused support for both the tourism and cultural sectors.

QUESTIONS TO CONSIDER

- *How long would a major restructuring take? Are their solutions we can put in place in the short term?*
- *How do we address other gaps in the system, such as the fact that there is no tourism marketing body to specifically represent Whitehorse?*
- *How does YG define culture?*
- *How should the tourism community work together to address the gaps that are preventing the development of sport tourism in the territory?*

RECOMMENDED ACTION

- *The Yukon Government should explore the concept of splitting the Department of Tourism and Culture into two separate departments: the Department of Small Business and Tourism and the Department of Arts and Culture. The Department of Economic Development could be dissolved, with the bulk of the resources being transferred to Small Business and Tourism and the remainder going to the appropriate departments. This model would provide more alignment between tourism and business (as is the case at the federal level) and would provide the arts and cultural sectors with the distinction, and resources they are due. Under such a structure, tourism marketing should be reallocated to a separate crown corporation, and the new Department of Small Business and Tourism should focus on business development.*
- *YG should explore the possibility of developing a Sport Directorate which would be adequately funded and bring more focus to the development of sport tourism in the Yukon.*
- *When TIA Yukon reviews its bylaws this year, revisions should be proposed to the membership that would enable the cultural sector to have more of a voice through TIA Yukon.*

Become a Bucket List Destination for all Canadians

When people think of the Yukon, it stirs up a sense of curiosity and adventure. The Yukon is referenced in pop culture and mentioned in Canadian curriculum and yet remains largely unknown to Canadians; an exotic, distant land to many, yet it is still part of Canada. It is a part of the country that most Canadians never get a chance to see. This is an opportunity that needs to be seized.

In 2017, Canada 150 celebrations encouraged Canadians to go out and explore Canada. This planted a seed: people were motivated to go down the path to purchase, in part because national pride dictated that they should see their country. This contributed to record visitation numbers across Canada.

What if we could continue the momentum created by Canada 150 but direct people to the Yukon specifically? If we could position the Yukon as the part of the

country that every Canadian needs to experience at least once in their lifetime, it would create a steady stream of visitation for the long term; it would increase short haul traffic from gateway cities which would support festivals and events, provide business for Air North, extend the shoulder seasons and encourage more winter visitation; it would alleviate issues with staffing, as it would promote the Yukon as an exciting place to live and work; and it would raise the prestige of the Yukon in Canada which would add weight to the territory's political clout in the federation.

QUESTIONS TO CONSIDER

- *Would Air North be able to extend further across the county if more marketing dollars were spent in Canada?*

RECOMMENDED ACTION

- *YG should work with TIA Yukon, Parks Canada, and Yukon communities and First Nations to develop a compelling marketing strategy that would appeal to Canadians, ideally dovetailing with Yukon 125*
- *YG should invest more marketing dollars in Canada*
- *TIA Yukon with support from government partners, should explore the feasibility of how dynamic educational material featuring the Yukon can be added to educational curriculum in every province and territory in Canada*

Embrace Our Advantage for Air Access

One only need look at the initiatives undertaken by Icelandair and Air New Zealand and the corresponding uptick in tourism revenue in their respective countries of origin to understand the major impact that airlines can have on a region's economy when the destination is an integral part of the airline's identity.⁸

The Yukon is incredibly fortunate to have Air North based here, and that it has chosen to brand itself as "the Yukon's Airline". This puts the territory in an enviable position that most countries aren't even afforded.

Much of the Yukon's tourism success has been a direct result of the access that Air North has created through affordable, regularly scheduled flights between the Yukon and gateway cities and between Yukon communities. Air North's contributions to tourism in the Yukon go far beyond transportation of people and goods - the fact that they are based in the territory means that they employ over 600 Yukoners; their marketing efforts as 'Yukon's Airline' promote the Yukon brand to help put the territory on the map; and in addition to being a great partner

⁸ Owrn, Kristine. <http://business.financialpost.com>. (June, 2015). How Iceland's Airlines Have Helped Spur a Tourism Boom, Lifting Its Battered Economy Back to Health; Tourism Industry Association of New Zealand. <http://www.tourism2025.org.nz>. (March, 2014). Tourism 2025: Growing Value Together.

to Yukon businesses and organizations, they are a major source of sponsorship for community events and initiatives that drive local tourism.

Much like the husky on the Yukon flag, Air North has become synonymous with the Yukon - a symbol that Yukoners have come to see as a companion, beloved for its loyalty to the territory and hailed for boldly blazing new trails, reliably moving people from one place to another, and safely bringing them back home. Air North's top notch customer service and community focused approach to business make it stand out in the world of airlines, and because it so passionately ties its brand to the Yukon, Air North is an asset that adds to the Yukon's uniqueness.

RECOMMENDED ACTION:

- *All tourism stakeholders need to support Air North in its work to open new routes to new destinations and to help promote the Yukon in its gateway cities if we hope to get tourism in the Yukon firing on all cylinders. Whenever possible, all efforts should be made by the Yukon government to align the Yukon's domestic marketing targets with those that support Air North's strategic plans.*
- *Once Air North has mastered the GDS system, the Yukon government should review the opportunities that this presents for the Yukon and work with Air North, and key industry stakeholders to pursue them.*

Conclusion

Tourism in the Yukon has incredible potential. We are in a strategic geographical position to take advantage of our proximity to Alaska, British Columbia, and Alberta, and to benefit from the distinction of being located North of 60. Our territorial status allows us access to federal government funds to support the development of business. The First Nation self government structure in the Yukon is one of the most unique and progressive in the world. The growing interest in First Nation culture coupled with the interest of Yukon First Nations to develop tourism, offers amazing opportunities for more tourism experiences throughout the Yukon. This will be key to building capacity in Yukon communities.

The Yukon's abundant resources in relation to its small population puts us in the enviable position of being able to pilot new projects at a community level. This could allow us to literally become a global leader in a niche tourism sector. The Carcross youth involved with Singletrack 2 Success are a shining example of what we can do when we work together. The Yukon's strong sense of community increases our odds of success, but there is a caveat to this: it comes down to seeing the forest instead of individual trees, and working in unison as a team, as opposed to getting caught up in the rivalries, disagreements, and general tensions that come with family dynamics.

We need to take risks. We need to make sure that the risks we take are responsible yes, but we need to do this without putting them into a perpetual study cycle where good ideas go to die.

Making the Yukon truly sustainable would be a game changer for the industry, and could revolutionize the territory as a whole. It's something that we should strive for, and it's something that's within reach.

The Tourism Industry takes heart in the appointment of Industry players to the YTDS Steering Committee. This is critical to the credibility and ultimate buy-in to the plan by the people who deliver tourism in the Yukon. TIA Yukon looks forward to working with the Tourism Department to deliver a plan that is truly an optimal "road map" to success of Yukon's Tourism Industry in the decades to come.