YUKON TOURISM ASSET INVENTORY

Summary Report of the 2024 Yukon Tourism Business Inventory & Labour Market Analysis

TIA Yukon
TOURISM INDUSTRY ASSOCIATION OF THE YUKON

World Leisure Centre of Excellence @ VANCOUVER ISLAND UNIVERSITY

The research team acknowledges, with respect and appreciation, that this document speaks to the operation of tourism business and consumption of tourism experiences conducted on the traditional territories of the Carcross/Tagish First Nation, Champagne and Aishihik First Nations, Kluane First Nation, Kwanlin Dün First Nation, Liard First Nation, Little Salmon/Carmacks First Nation, Nacho Nyak Dun First Nation, Ross River Dena Council, Selkirk First Nation, Ta'an Kwäch'än Council, Teslin Tlingit Council, Tr'ondëk Hwëch'in, Vuntut Gwitchin First Nation, and White River First Nation.

We honor their histories, cultures, and continuing contributions to the Yukon, while acknowledging that this tourism asset analysis does not identify tourism businesses owned or operated by Indigenous Nations. This limitation is recognized as resulting from the scope and time constraints that researchers worked within.

This project was conducted as a partnership between the Tourism Industry Association of the Yukon (TIA Yukon) and the World Leisure Centre of Excellence at Vancouver Island University (WLCE@VIU).

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Executive Summary

The Yukon Tourism Asset Inventory: Summary Report of the 2024 Yukon Tourism Business Inventory & Labour Market Analysis presents a comprehensive evaluation of the Yukon's tourism sector, conducted collaboratively by the Tourism Industry Association of the Yukon (TIA Yukon) and the World Leisure Centre of Excellence at Vancouver Island University (WLCE@VIU). Funded by the Yukon Government and Mitacs, this study assesses the region's tourism assets, business operations, labour market dynamics, and strategic opportunities amid evolving post-pandemic travel trends and economic challenges.

The Yukon's tourism sector is a cornerstone of its economy, contributing 5% to regional GDP and supporting 9% of employment. Recent shifts in consumer preferences—toward sustainability, cultural authenticity, and experiential travel—have necessitated a re-evaluation of the territory's tourism infrastructure. This report addresses gaps in understanding the sector's current capacity, labor needs, and readiness to meet demand, particularly in light of post-COVID recovery, inflation, geopolitical tensions, and changing immigration policies.

Sector Breakdown: The inventory identified 583 tourism businesses, with accommodation (37%) and experiential providers (32%) comprising the majority. Only 20% of businesses self-identified as "export-ready" for international markets, highlighting gaps in global competitiveness.

Labour Challenges: Workforce shortages persist, with 68% of businesses reporting difficulty recruiting skilled staff, exacerbated by housing shortages and seasonal demand fluctuations.

Indigenous Engagement: While the report acknowledges the traditional territories of 14 Indigenous Nations as vital tourism assets, it notes a critical gap: Indigenous-owned or operated businesses were not systematically identified due to scope constraints, signaling a need for future collaboration.

SOAR Analysis:
Strengths: Pristine natural landscapes, cultural heritage, and a resilient entrepreneurial community.
Opportunities: Adventure tourism expansion, winter tourism diversification, and partnerships with Indigenous communities.
Aspirations: Enhanced sustainability practices, improved digital connectivity, and infrastructure upgrades (e.g., transportation, housing).

Results: A call for coordinated marketing, workforce development programs, and policies to support small and medium enterprises.

Identified Gaps

Critical gaps include limited digital marketing capabilities, fragmented industry collaboration, underdeveloped MICE (Meetings, Incentives, Conferences, Events) tourism, and insufficient data to assess sector successes, needs, and general performance. Labor shortages and housing remain urgent challenges.

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Definitions

Business & Market Ready	This means you produce your own product and sell it to consumers (Government of Yukon).
DMO	Destination Management/Marketing Organization. Tourism Yukon.
Export Ready	Refers to a business that markets to and through travel trade distribution sales channels, understands commission or net rate pricing, agrees to trade bookings and a cancellation policy (Destination BC).
Market Ready	Refers to a business that markets to potential visitors; communicates with potential visitors year-round, and is ready to accept advanced reservations (Destination BC).
MICE	Meeting, Incentive, Conference, and Event travel.
SOAR Analysis	An analytical framework used in strategic planning when using appreciative inquiry or a strengths-based approach. SOAR stands for: Strengths, Opportunities, Aspirations, and Results. It is an alternative to the traditional SWOT analysis.
Tourism Adjacent	Businesses that are vital to the tourism sector but are primarily focused on residents.
Tourism Assets	Natural landscapes, built infrastructure, cultural and historical heritage, festivals and events, goods and services provided/sold by public, private, or not-for-profit organizations that are used/attended by or targeted as visitors to the Yukon.
Tourism Business	Businesses that earn a significant portion of their revenue from visitors.
Tourism Infrastructure	Transportation (airports, roads, & waterways), financial services, digital connectivity, and sub-sector businesses/organizations required for tourism businesses and organizations to operate. This can also include government services and organizations such at DMOs.

Trade Ready	This means you sell your product through travel trade distribution channels (Government of Yukon).
Travel Services	Businesses, non-profits, community and government agencies that provide support the development, planning, or reserving of visitor experiences. These include travel agencies, online travel agencies (OTAs), destination marketing organizations, professional associations, and event and conference planning services.
Travel Trade	"A key channel to reach consumers in overseas markets is through travel trade. Travel trade includes online travel agents, receptive tour operators, tour operators, wholesalers, and travel agents" Destination BC).
Visitor Ready	Refers to a business which has all of their licenses, permits and insurance in place in order to operate legally (Destination BC).

Introduction: Yukon Tourism Asset Inventory

The Yukon Territory, characterized by its breathtaking landscapes and rich cultural heritage, has long been a destination of choice for adventurers, nature enthusiasts, and cultural tourists alike. The tourism sector is vital to the Yukon's economy, contributing approximately 5% to its GDP and accounting for about 9% of total employment (Government of Yukon, 2022). However, the impacts of the COVID-19 pandemic have underscored the necessity for a comprehensive reassessment of tourism assets and the labour market within the region. As the tourism landscape evolves, so too must the strategies and resources that support it.

The dynamics of tourism have shifted significantly in recent years, driven by changing consumer preference, global travel trends, inflation, changing immigration policies, and most recently, the escalating tensions with the United States (Dunn, 2025). The growing demand for sustainable and experiential travel, particularly post-pandemic, necessitates an evaluation of existing tourism assets (Government of Yukon, 2018). Tourists increasingly seek authentic experiences that connect them with local culture and the environment, which requires a comprehensive understanding of the region's unique offerings. An updated asset inventory will enable stakeholders to identify strengths, gaps, and potential areas for growth, thereby fostering a more resilient tourism economy.

The Yukon's tourism sector is marked by a diverse range of stakeholders, micro, small, and medium business, corporations with global operations, First Nations, and government agencies. Effective collaboration among these groups is essential for creating a cohesive tourism strategy that benefits all parties. The establishment of a coordinated asset inventory facilitates improved communication and collaboration, allowing stakeholders to share resources, knowledge, and best practices. This is particularly pertinent given the Yukon's commitment to sustainable tourism, which emphasizes its rich cultural and natural heritage and to meet the goal measuring tourism growth (van der Meer, et al., 2022).

In addition to the need for an updated tourism asset analysis, the labour market within the Yukon's tourism sector also requires careful examination. As tourism rebounds, the demand for skilled workers is expected to rise. However, many businesses face difficulties in recruiting and retaining talent due to seasonal employment patterns and skill mismatches (Tourism Industry Association of the Yukon, 2023). A thorough labour market analysis will identify existing skills gaps and inform training and development programs aimed at equipping the local workforce with the necessary competencies to thrive in the tourism sector. This proactive approach not only enhances workforce readiness but also contributes to the overall economic sustainability of the region.

The Yukon's tourism landscape is marked by seasonality, with peak seasons creating pressure on resources and infrastructure. An updated asset inventory and labour market analysis can help identify strategies for managing these seasonal fluctuations, thereby promoting year-round tourism and economic stability. By diversifying the tourism offerings and developing initiatives that attract visitors during the low season, stakeholders can mitigate the economic impact of seasonal variability. This aligns with the Yukon's broader goal of creating a sustainable tourism framework that benefits local communities and respects the environment (Government of Yukon, 2022).

Yukon's unique geographical and cultural context presents both challenges and opportunities for tourism development. The region's remote nature can deter potential visitors, and misconceptions about accessibility and costs may hinder growth (Griffin, 2024). A comprehensive tourism asset analysis can address these challenges by illuminating the diverse attractions available, highlighting local experiences, and enhancing marketing efforts aimed at potential visitors. Additionally, insights gained from a labour market analysis can inform recruitment strategies that target specific skills or demographics, ensuring that the tourism sector is well-equipped to meet the needs of its clientele.

The need for an updated tourism asset and labour market analysis in the Yukon Territory is underscored by the evolving nature of the tourism industry, the importance of stakeholder collaboration, the necessity for sustainable practices, and the overall uncertainty about the number and composition of tourism business across the territory. As the Yukon seeks to grow its tourism industry and its role in the economy, a comprehensive understanding of its tourism assets and workforce will be crucial. Therefore, the purpose of the research presented in this report was to:

- ✓ Compile a comprehensive list of tourism businesses owned and operated in the Yukon.
    - ✓ Conduct a gap analysis of the Yukon's tourism asset inventory.
    - ✓ Conduct an analysis of the labour market needs of tourism operators.
    - ✓ Better understand the energy usage of tourism operators.
    - ✓ To provide recommendations for future growth and development in the tourism sector.

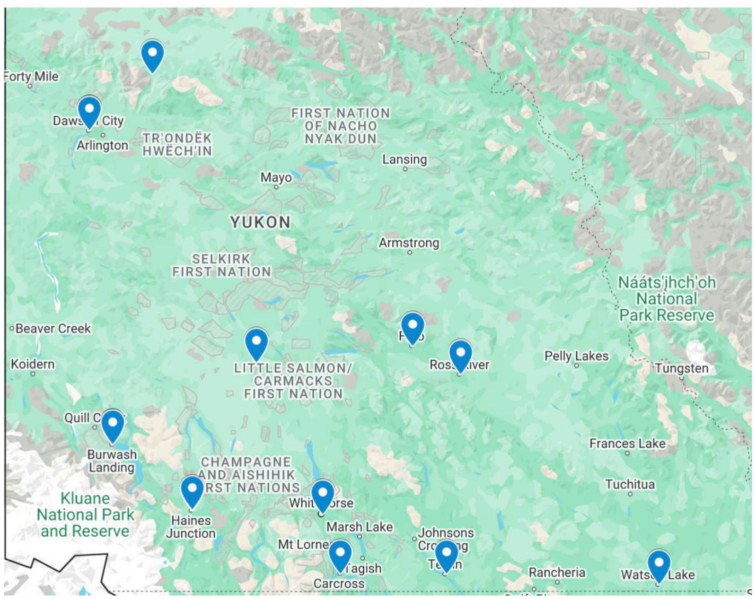
Methods

The project used a mixed methods approach to collect as much data about the tourism assets, labour market needs, employment characteristics, and operators' energy usage. The primary focus for the research was on tourism businesses and infrastructure; therefore, Territorial and National parks and recreation areas and community recreation facilities were not included.

Phase I – Data Collection

The first phase of data collection was a familiarization tour (Fam-Trip) designed to introduce the student researchers to the Yukon Territory, rural communities, and to find and inventory tourism businesses and assets that did not have a digital footprint and were not on existing lists. The primary communities visited during the familiarization tour included Whitehorse, Carcross, Teslin, Watson Lake, Ross River, Faro, Carmacks, Dawson City, Haines Junction, and Burwash Landing (Figure 1).

Figure 1: Primary Locations Visited During the Fam-Tour



During the Fam-Trip the researchers toured each community, making note of community assets (e.g., Town of Faro campsite), festival and event posters, and collecting flyers and brochures from local visitor centres. All information was entered into an Excel worksheet which was later augmented with results from internet searches and cross-referencing with lists of Tourism Industry Association of Yukon (TIA Yukon) membership lists and Yukon Government business license lists.

Phase II – Data Collection

The second phase of data collection was an online survey of the tourism businesses that were identified in the first phase of data collection. Using the online data collection platform, SurveyMonkey, an online survey instrument was designed to collect data from business owners or managers from different sectors of the tourism industry. The survey was structured to collect identifying information about the business, before only answering questions focused on their tourism sector. Participants were asked questions about their product offerings, seasons, occupancy/sales levels, employment levels, employee needs and recruitment, target markets, and energy usage.

Participants were initially invited to participate through multiple email blasts from TIA Yukon. This resulted in a very small sample of completed surveys, so the research team conducted two rounds of phone calls to listed businesses. The first round included approximately 480 businesses and the second round approximately 150 businesses. This resulted in a sample size of 90 tourism businesses.

Phase III- Data Collection

The final phase of data collection included conducting 10 follow-up interviews with participants representing different sectors. The interview data were collected to seek deeper understanding of the survey results and deeper understanding of participants' experiences in the Yukon tourism sector. These data will primarily be used in the research theses written by Sorour Mozafari and Riya Rajesh, which will be published separately and after this report.

Results

The results of this research are presented in two main sections: (a) analysis of the main data base, and (b) analysis of the survey. The purpose of this analysis is to provide a high-level overview of the state of the tourism industry from an asset inventory perspective. The final sample size for the main data base included 583 tourism assets, the majority of which were micro, small, or medium sized businesses. An additional four business that were based in British Columbia, Alberta, and Ontario but operated in the Yukon were also included in the data base created for TIA Yukon but were not included in analysis. The survey sample included responses from 90 business owners or managers.

Assessing the 583 Tourism Businesses

Given the dispersion of residents throughout the Yukon Territory, it was not surprising that the majority of tourism businesses were located in Whitehorse (n= 303), Dawson City (n= 86), Haines Junction (n= 35), and Watson Lake (n= 27). With their proximity to Whitehorse and their location on iconic travel corridors Carcross (n= 16) and Carmacks (n= 13) were also home to a cluster of tourism businesses. Figure 2 illustrates the distribution of the tourism business by sub-sector throughout the Yukon (Figure 2).

Accommodation Sector

Accommodation options across Yukon included globally recognized brands (e.g., Best Western or Wyndham); however, most were Yukon brands and not part of national or international chains. Bed and breakfasts, wilderness resorts, motels, and campgrounds were found through the rural communities. The totals in Figure 3 represent all forms of accommodation including fixed roof and campgrounds.

Campgrounds, particularly those with RV services, play an important role in Yukon tourism in rural communities and along the primary highway corridors of the Alaska, Klondike, and Dempster Highways. They provide the necessary accommodation infrastructure to allow visitors to disperse throughout the Territory and to access the natural landscapes, protected areas, and other land- and water-based activities. This analysis does not include National or Territorial Parks and recreation areas; however, community campsites were included (Figure 4).

Figure 2: Distribution of Tourism Business by Community and Sector

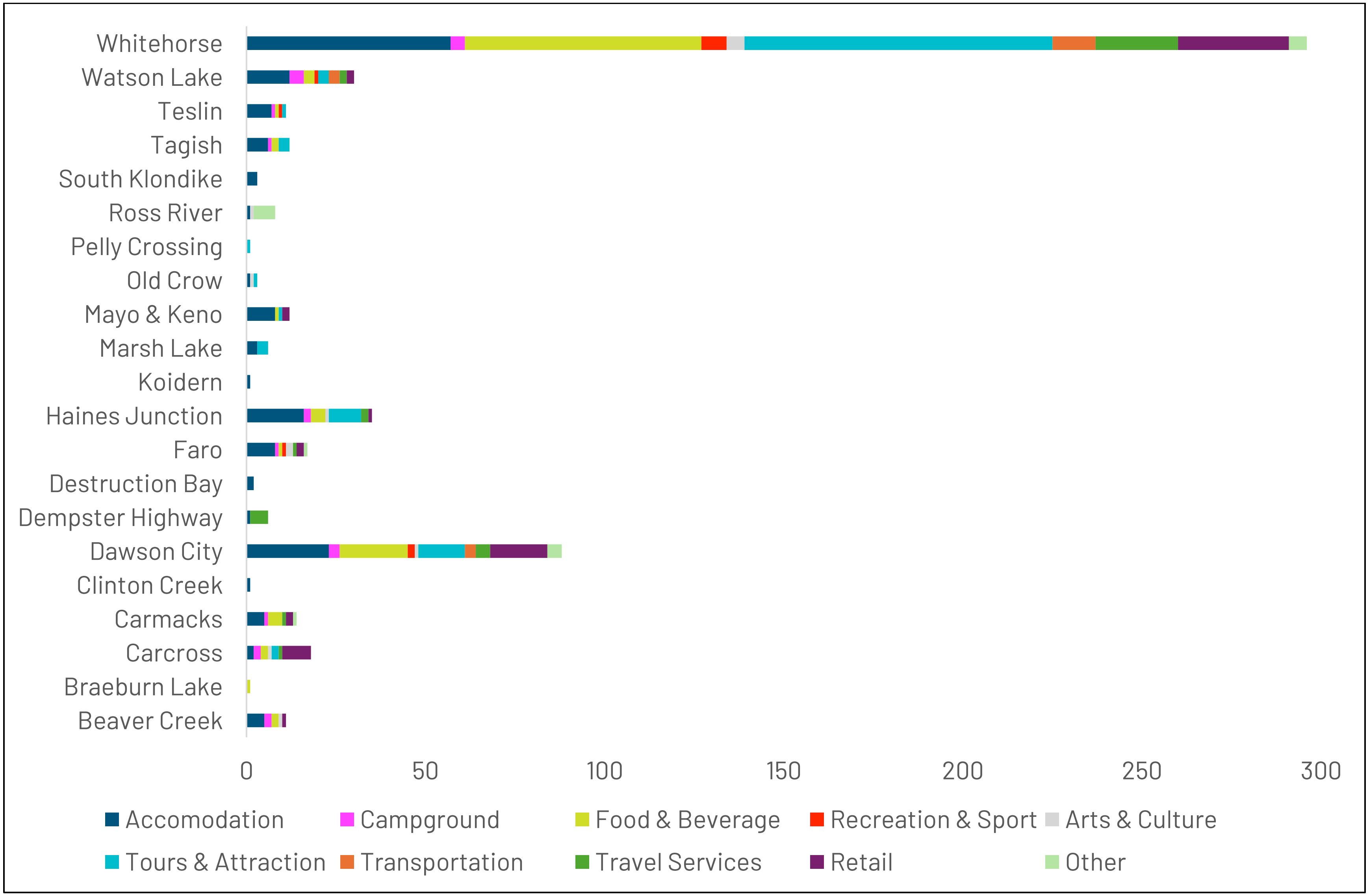


Figure 3: Distribution of Accommodations Options

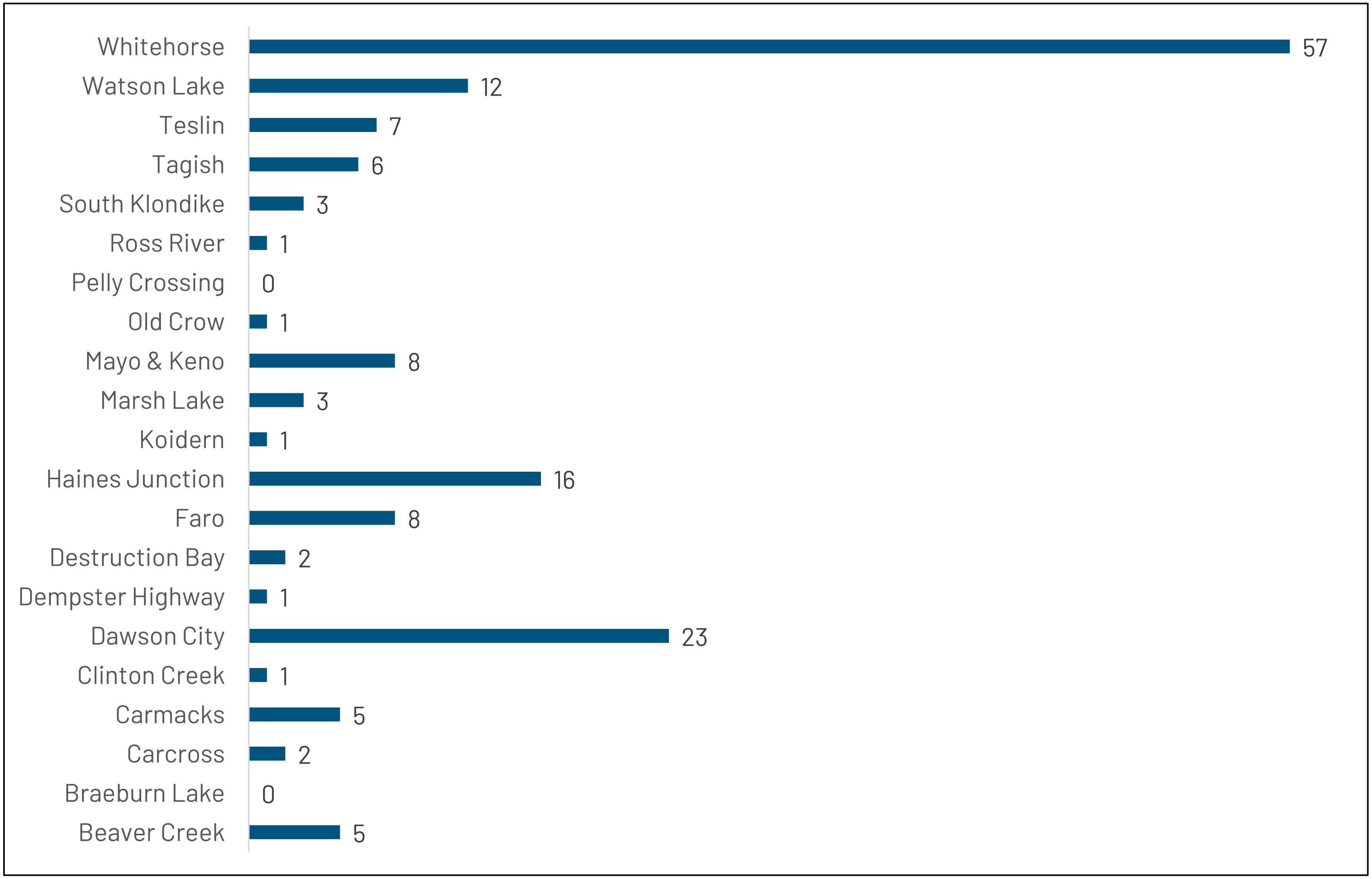
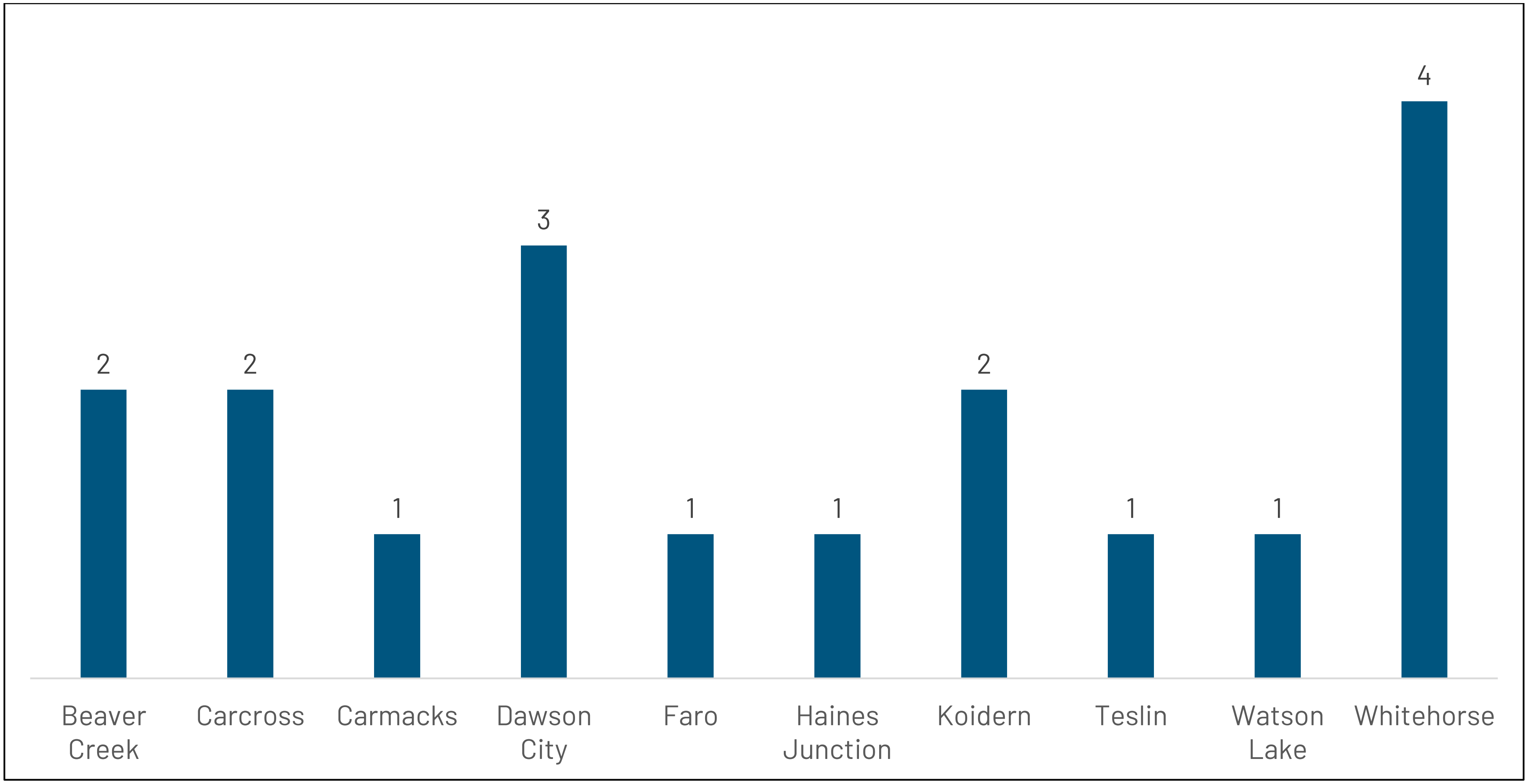


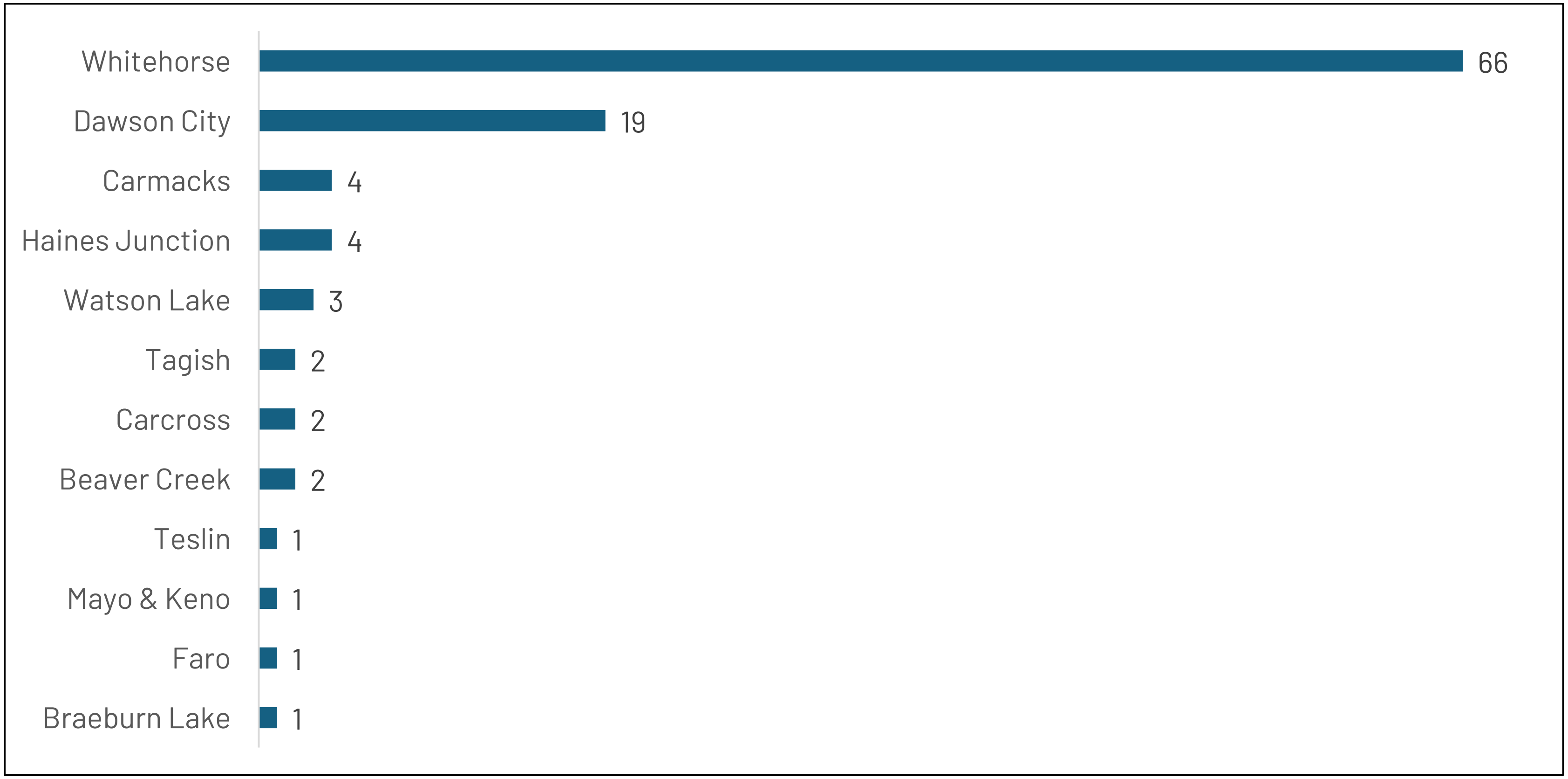
Figure 4: Number of Campgrounds in Each Community



Food & Beverage Sector

Food and beverage options (n= 102) were limited in many of the rural communities apart from Dawson City (n= 19). As with most tourism assets, the more than half of all food and beverage related businesses were in Whitehorse (n= 66). Many of the food and beverage options are located within accommodation properties and not always easily seen or obviously open. Figure 5 illustrates the number of food and beverage options available in each community.

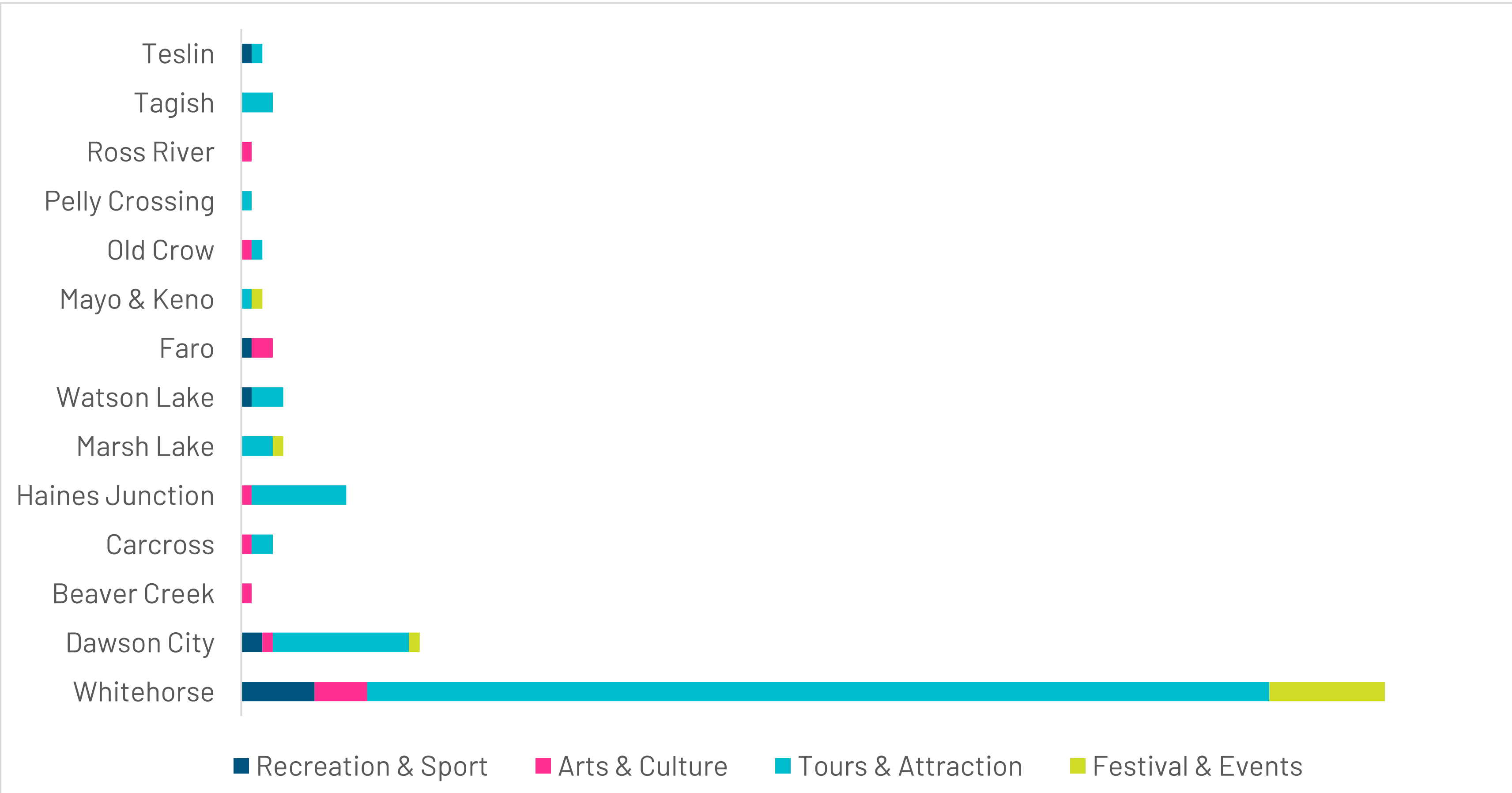
Figure 5: Number of Food & Beverage Options by Community



Experiential Sectors

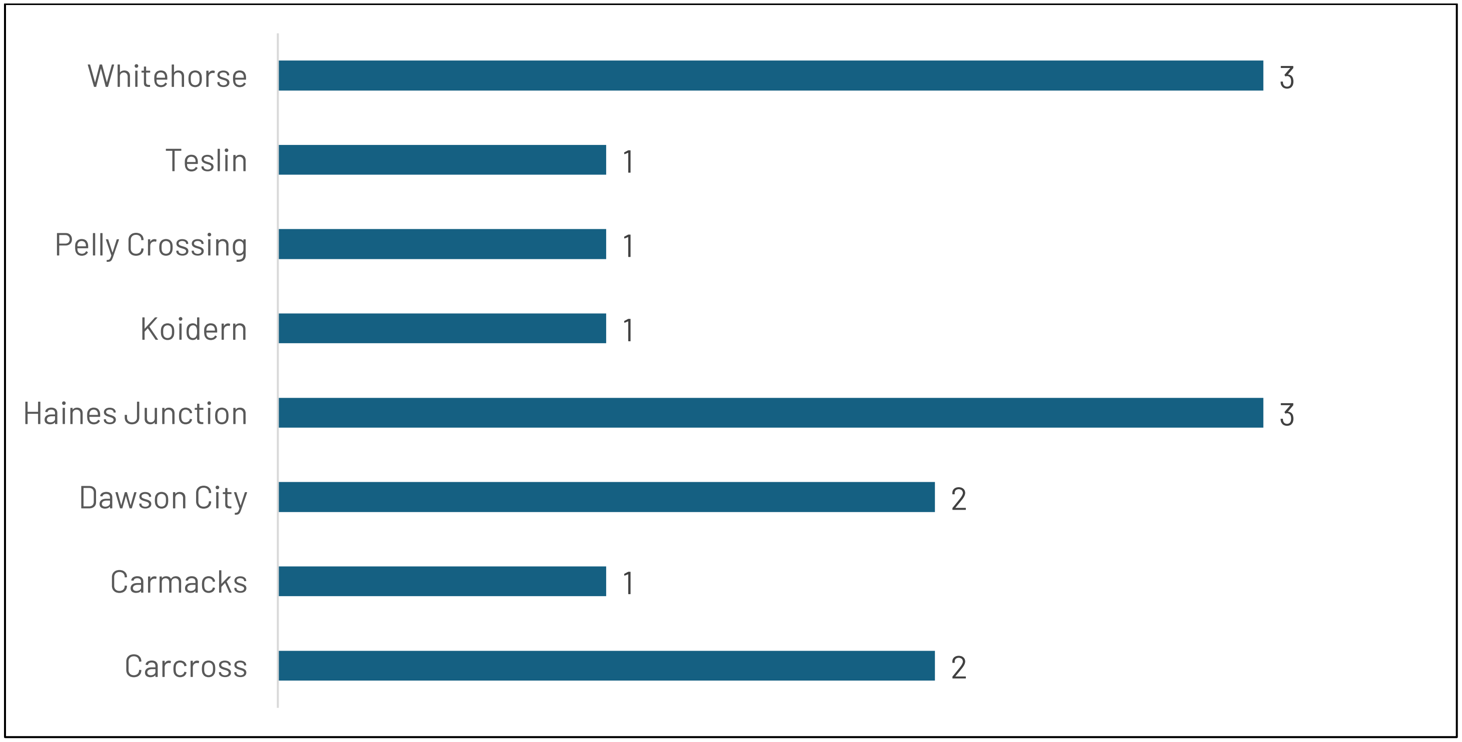
The natural landscapes, aurora borealis, and wildlife are central to the Yukon tourism experience; however, tours and build attractions (n= 123), recreation and sports facilities (n= 12), arts and cultural events (n= 13), and festivals and events (n= 14) are essential for a robust tourism industry. Experiential assets were predominantly located in Whitehorse (n= 109) and Dawson City (n= 17), and Haines Junction (n= 10); however, many of the tour and attraction business located in Whitehorse (n= 86) offered tours throughout Yukon. Figure 6 shows the distribution of different types of experiential assets by community.

Figure 6: Number of Experiential Assets by Community



The Yukon has rich and diverse Indigenous cultures and unlike other provincial and territorial jurisdictions, 11 of the 14 Nations are self-governing. The Conference Board of Canada (2025a) noted that Indigenous tourism operators are still recovering to pre-pandemic levels, while also identifying growing demand for Indigenous tourism experiences and products. While Indigenous tourism has been identified as a vehicle for increasing employment in rural communities and for Indigenous youth, it is also recognized that there is significant need for training programs to ensure a skilled workforce is available. Figure 7 shows the number of Indigenous Tourism products included in the master database (n= 14).

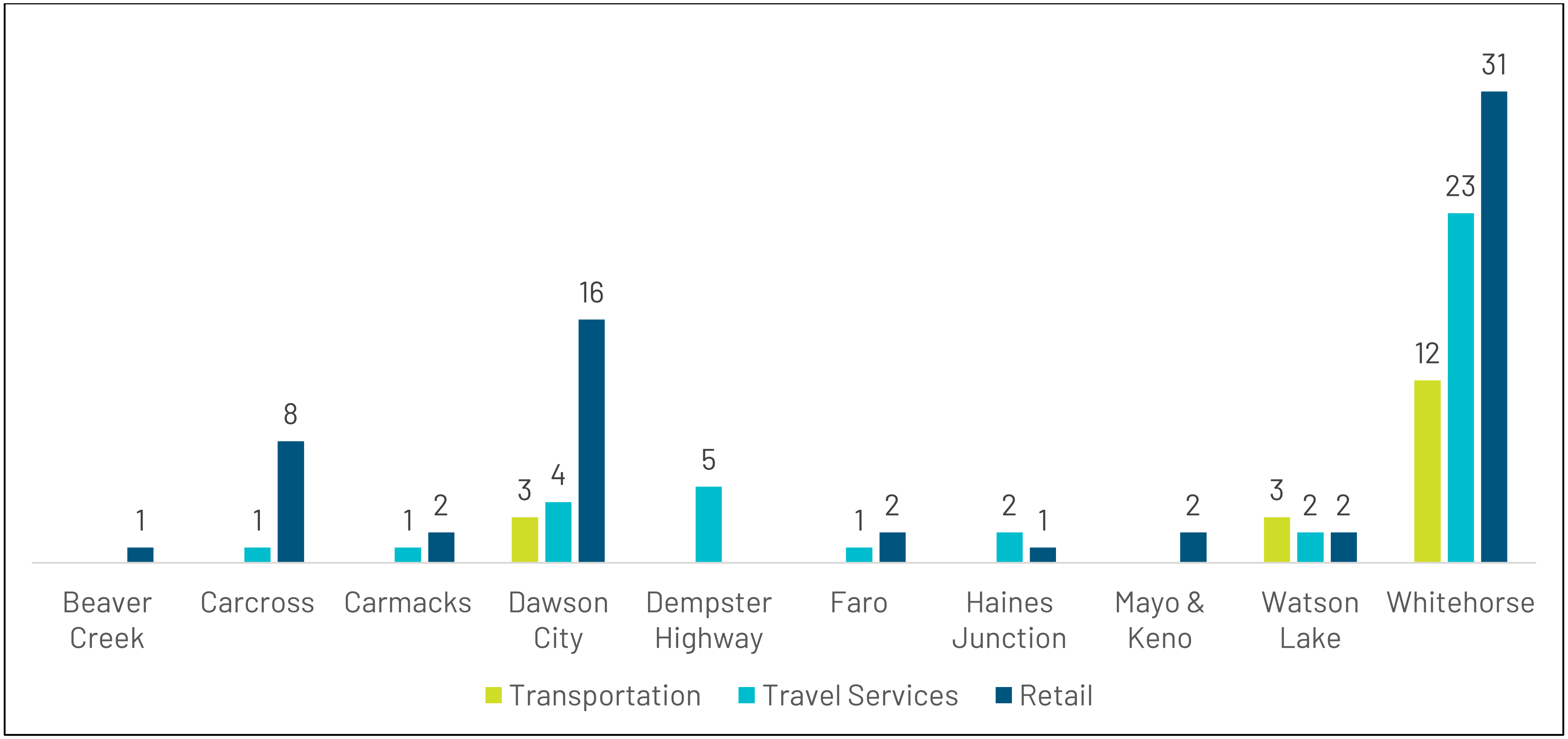
Figure 7: Indigenous Tourism Products & Experiences



Transportation Sector

Transportation (n= 18), travel services (n= 39), and retail (n= 65) are vital components of the tourism industry, often providing support services to visitors and other tourism business. Travel services include, but is not limited to, a broad cross section of organizations and businesses such as event planners, DMOs, industry associations, logistic supports, vehicle and equipment rentals, and travel agencies. Many of the transportation services available were small charter airlines that offered both transportation and tour options. Figure 8 shows the number of transportation, travel service, and retail (tourism linked) organizations and businesses by community.

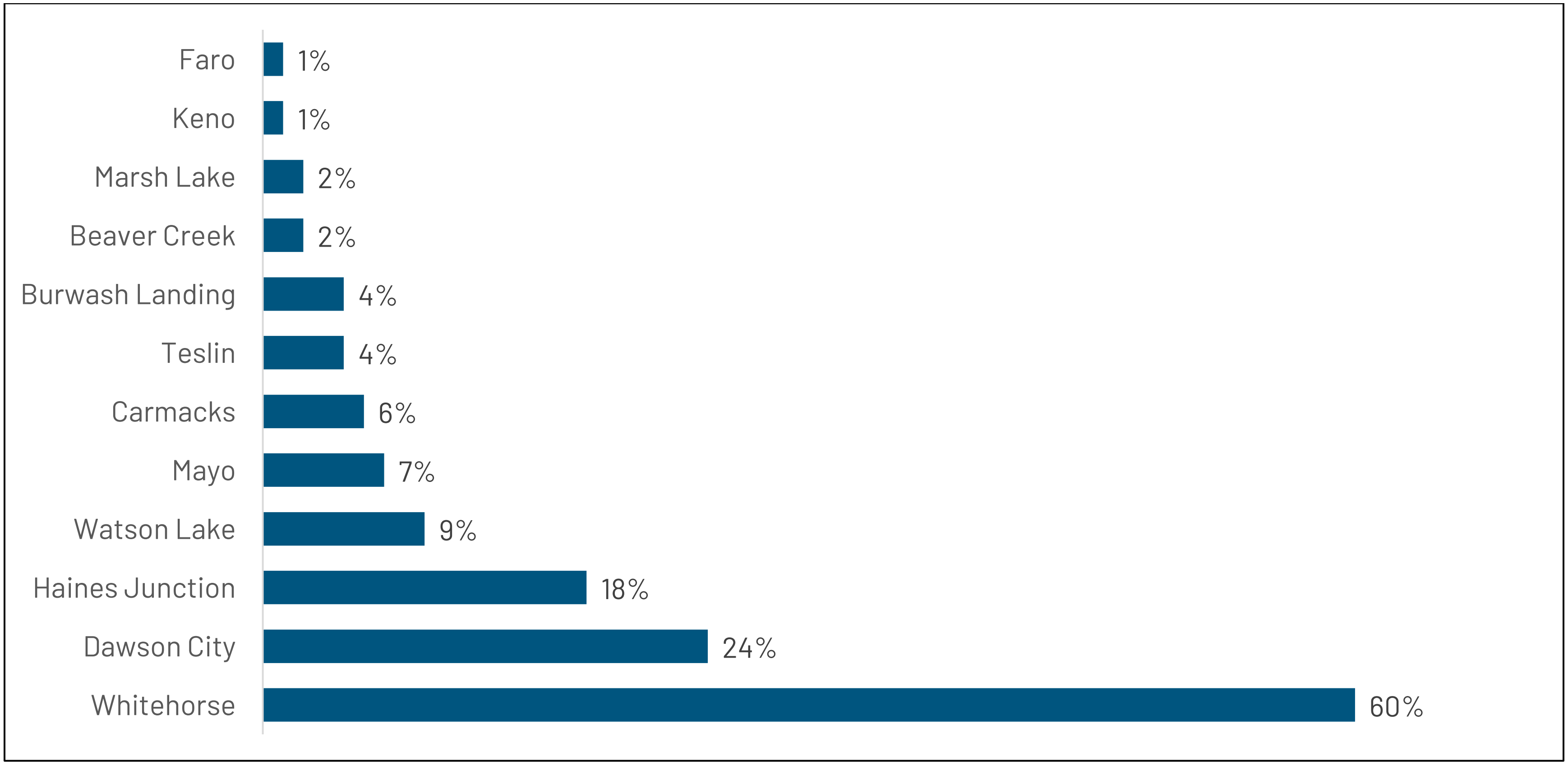
Figure 8: Transportation, Travel Services, & Retail Businesses and Organizations.



Summary Survey Results

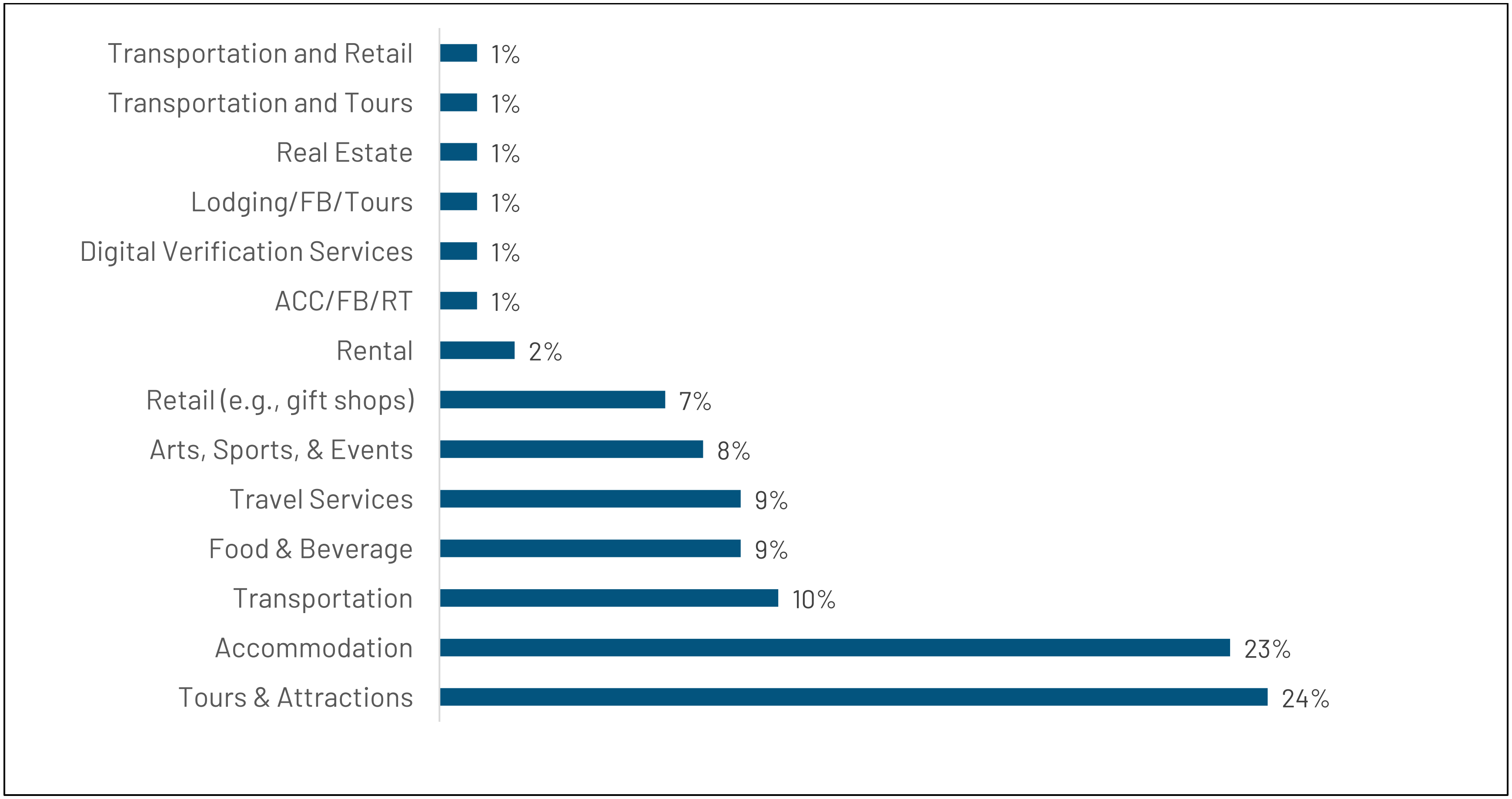
The distribution of survey participants (n= 90) by community follows a similar pattern to the distribution seen in the master database. Sixty percent were from Whitehorse and 24% from Dawson City, 18% from Haines Junction, and 9% from Watson Lake. Figure 9 illustrates the distribution of participants across all communities represented.

Figure 9: Survey Participants by Community (n= 90)



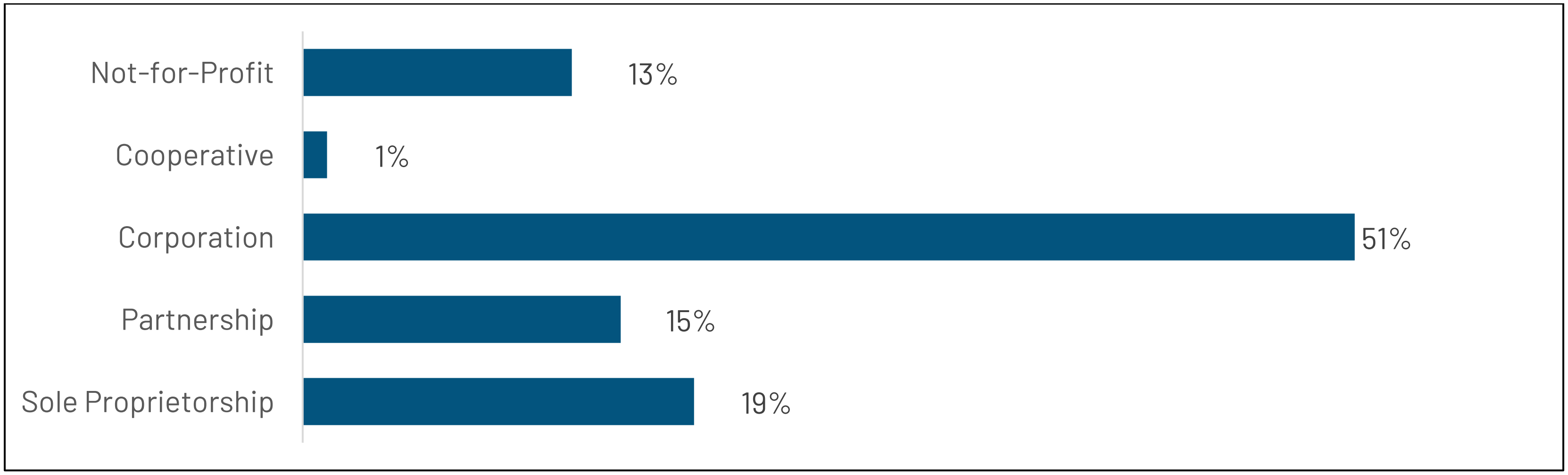
Survey participants self-identified the sector that their businesses represented; however, as was found with the master database, many tourism businesses had operations in more than one sector. As seen in Figure 10, tours and attractions (24%) and accommodations (23%) were the most represented sectors in the sample.

Figure 10: Survey Participants by Sector (n= 90)



Incorporation (51%) represented the most common form of business, with sole proprietorship (19%) and partnerships (15%) being the next most common (Figure 11).

Figure 11: Business Structure of Survey Participants (n= 84)



While the length of time that study participants reported being in business (Figure 12) would suggest that the Yukon has a mature tourism industry, the reality is that many businesses in the tourism sector are still in the business or visitor ready stages of development (Figure 13). Further, many of these businesses have existed for many years (Figure 14), raising the question about why they have not moved towards market or export ready status. What this means for the long-term growth and development sustainable tourism development is unknown, as maturing the Yukon tourism sector will require significant investments in skills training, labour force recruitment, entrepreneurship, infrastructure, and product development (Conference Board of Canada, 2025a; Conference Board of Canada 2025b).

Figure 12: How Long Participants' Businesses Have Existed (n= 85)

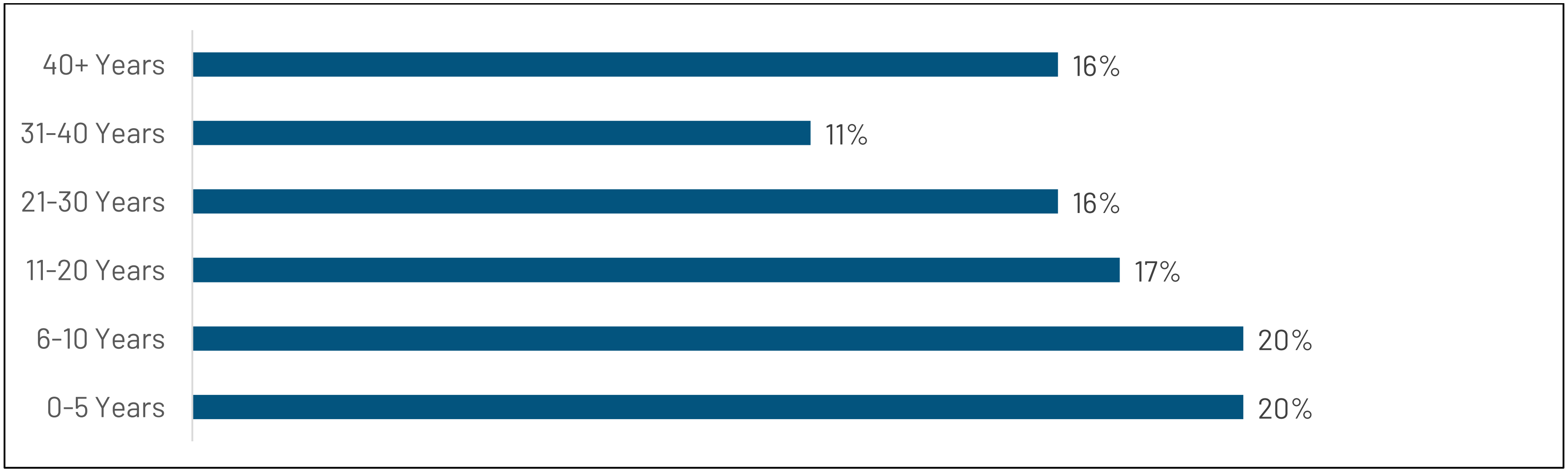


Figure 13: Self-Identified Market Readiness (n= 87)

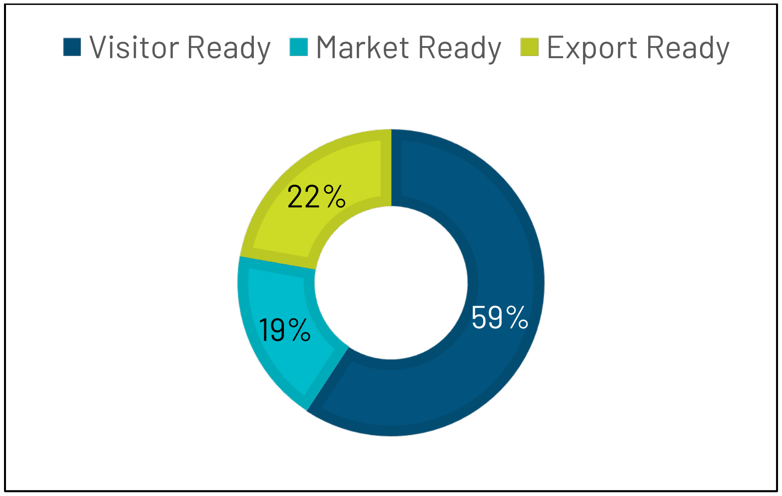
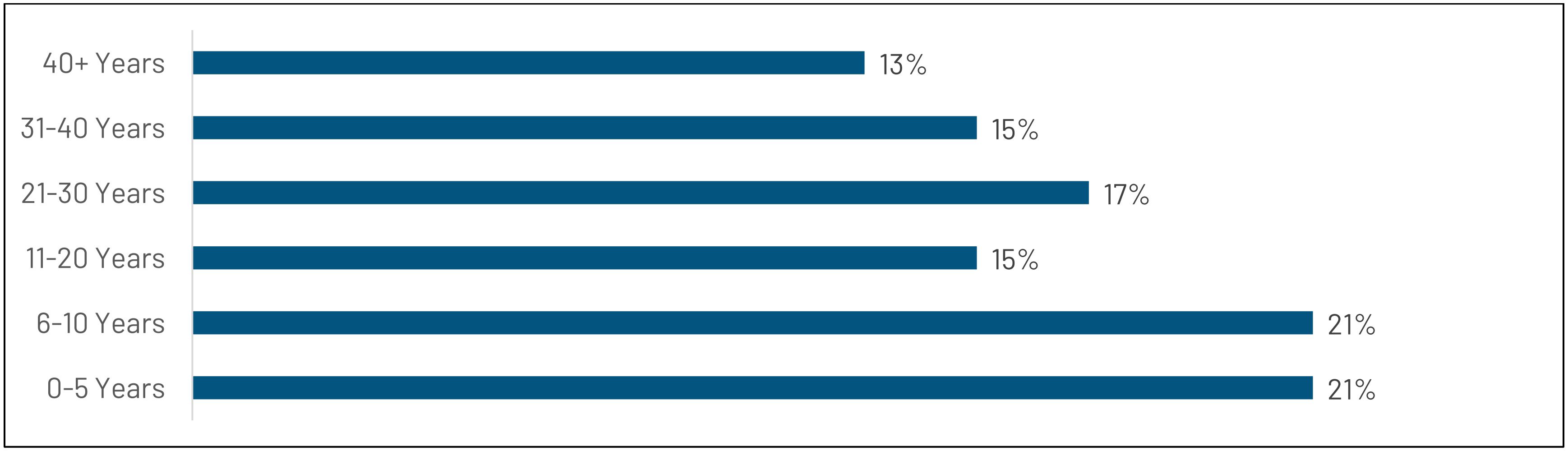
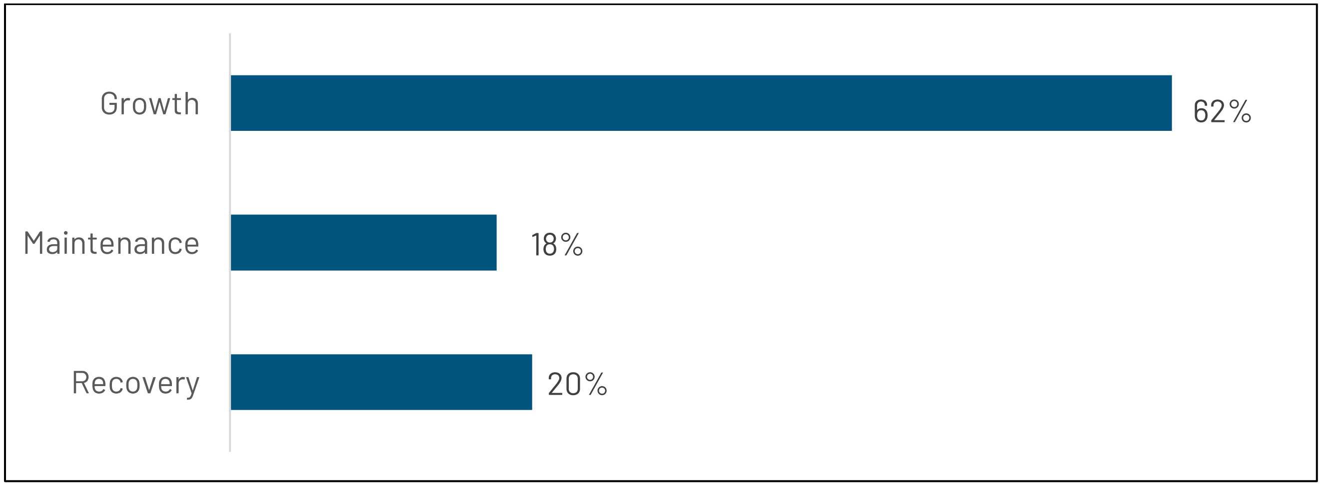


Figure 14: Length of Business Operations of Visitor Ready Businesses (n= 87)



Despite most businesses not being ready to take advantage of the travel trade (59%), study results revealed that 69% of businesses received the majority of their income from tourism and have a strong growth mindset within the tourism industry. More than 60% of study participants indicated that they were growth focused (Figure 15); in contrast, only 20% of participants indicated that they were still in a position of recovery from the pandemic. However, global economic uncertainty, labour force and skills gaps challenges, and the need for infrastructure investments will impact the ability to realize the desire for growth.

Figure 15: Business Growth Orientation (n= 85)



Approximately 66% of businesses reported being open all year; however, 44% indicated that their peak season started in June and continued through July (52%), August (51%), and September (40%). Figure 16 shows the months that businesses identified as their peak seasons. This pattern matches the general seasonality of tourism across Canada but also highlights the potential impact of winter festivals and events and unique natural phenomena (i.e., aurora borealis) as well as the growth potential for winter tourism.

The Conference Board of Canada (2025a; 2025b) and the Government of Yukon (2018) have noted that access to a skilled labour force and the need for additional training are both necessary for the development of a sustainable tourism industry that achieves its full potential. The results of the survey research revealed that participant businesses employed approximately 50% more individuals during the peak season (self-defined by businesses) than the low season (Figure 17). There may be several reasons for this drop, including the return of season workers to university/high school or a reduction in demand that after the high season. Participants also noted that they relied on employees from outside of the Yukon Territory (Figure 18), with 21% coming from outside of Canada.

Figure 16: Percentage of Businesses Identifying Each Month as Their Peak Season (n= 90)

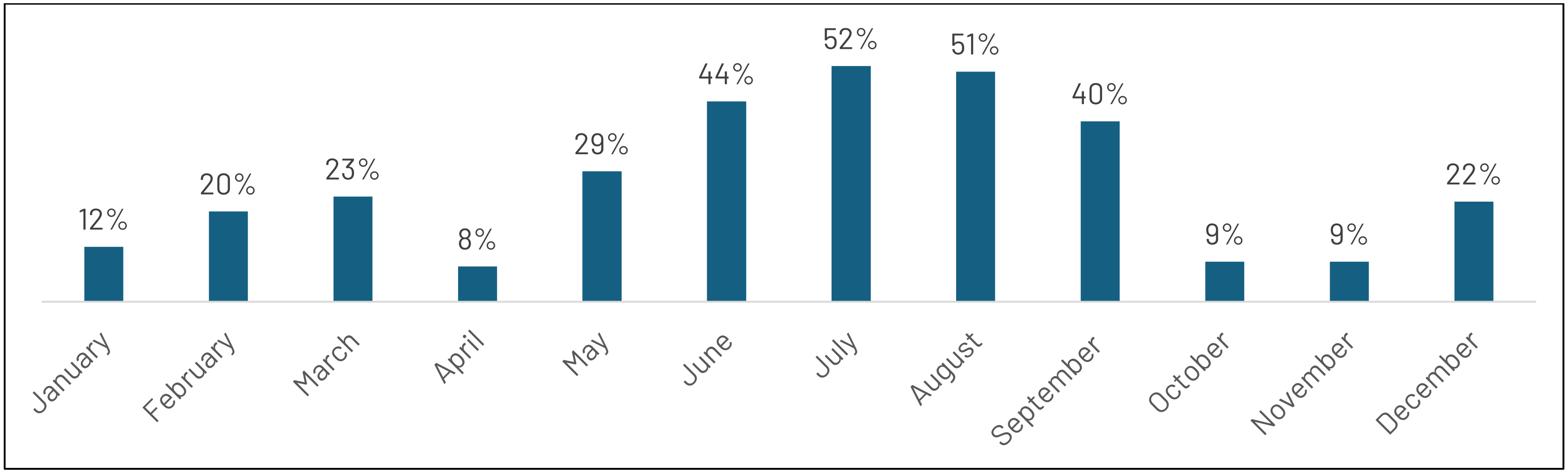
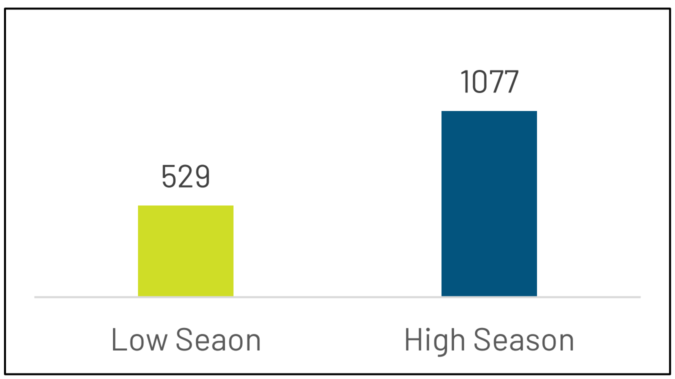


Figure 17: Number of Employees in Low & Peak Seasons (n= 78)



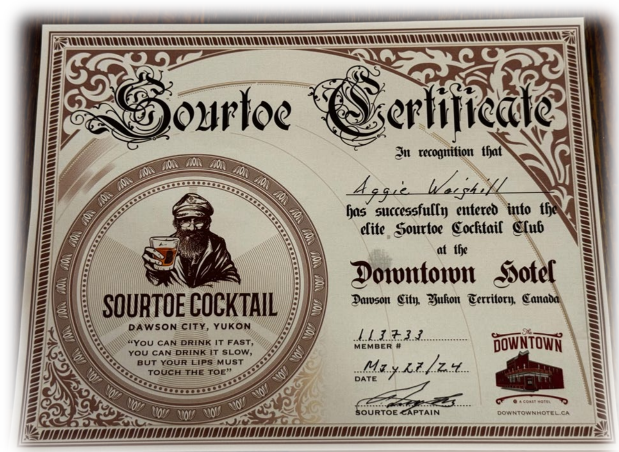
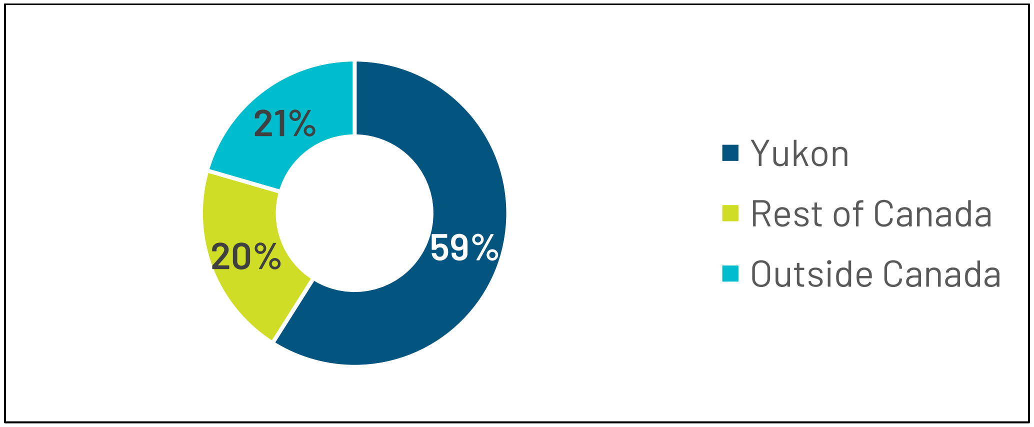


Figure 18: Where Employees Were Recruited From (n= 78)



Accommodation Sector

Twenty-three percent of participants represented businesses in the accommodation sector (n= 21). These businesses represented 865 rooms in fixed-roof accommodation, with the majority being located in Whitehorse (Figure 19) and Dawson City. Sixty percent of accommodation providers reported occupancy levels between 75% to 100% during the peak season but 72% reported less than 25% occupancy during the low season (Figure 20).

Figure 19: Distribution of Accommodations Throughout the Yukon

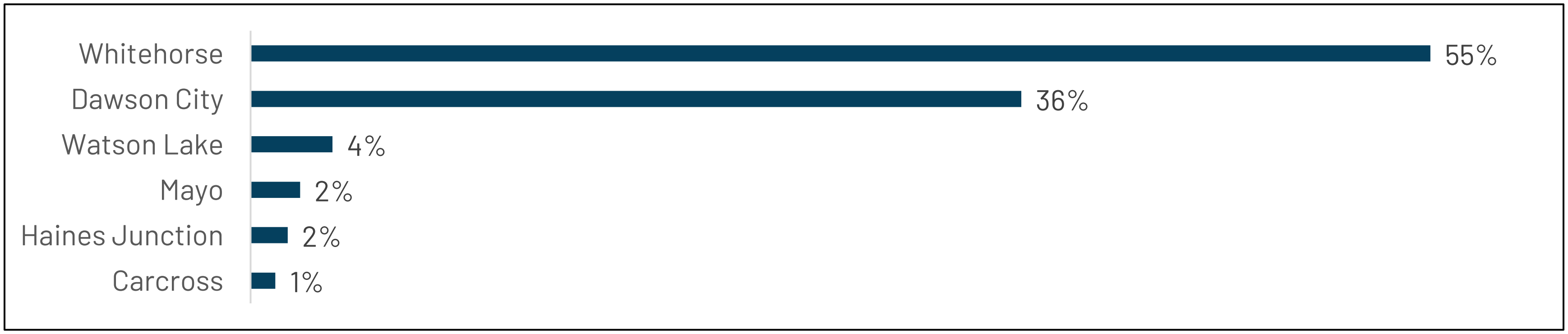
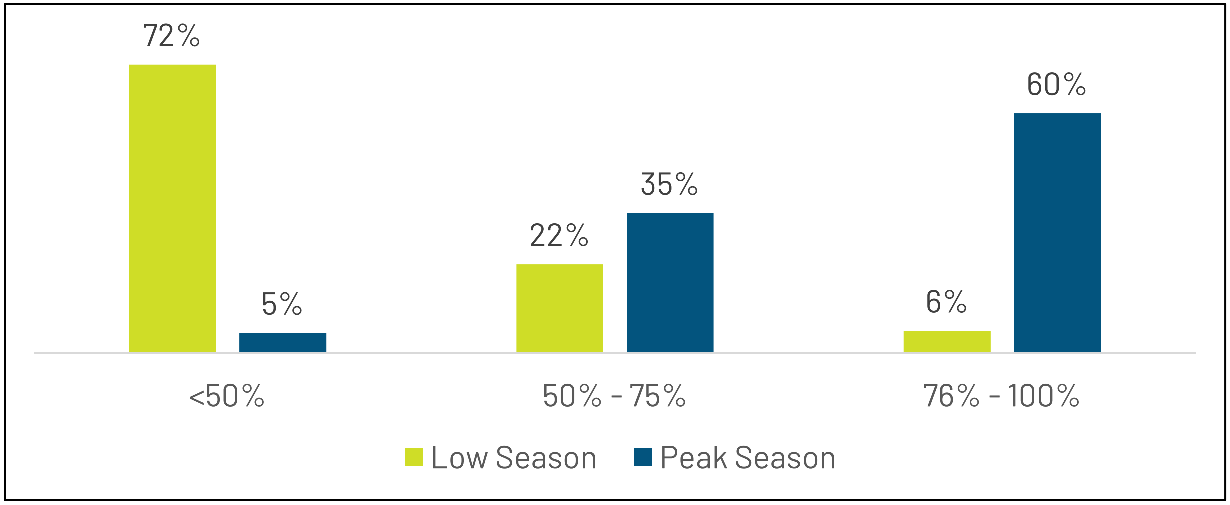


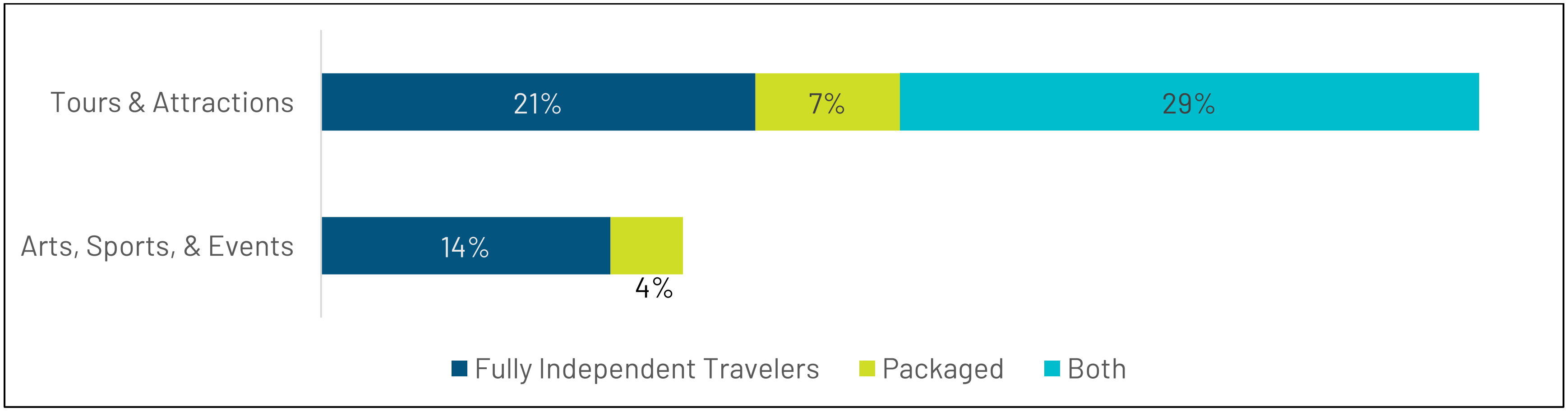
Figure 20: Accommodators' Estimated Occupancy Rates in Low & High Season



Tourism Experience Providers

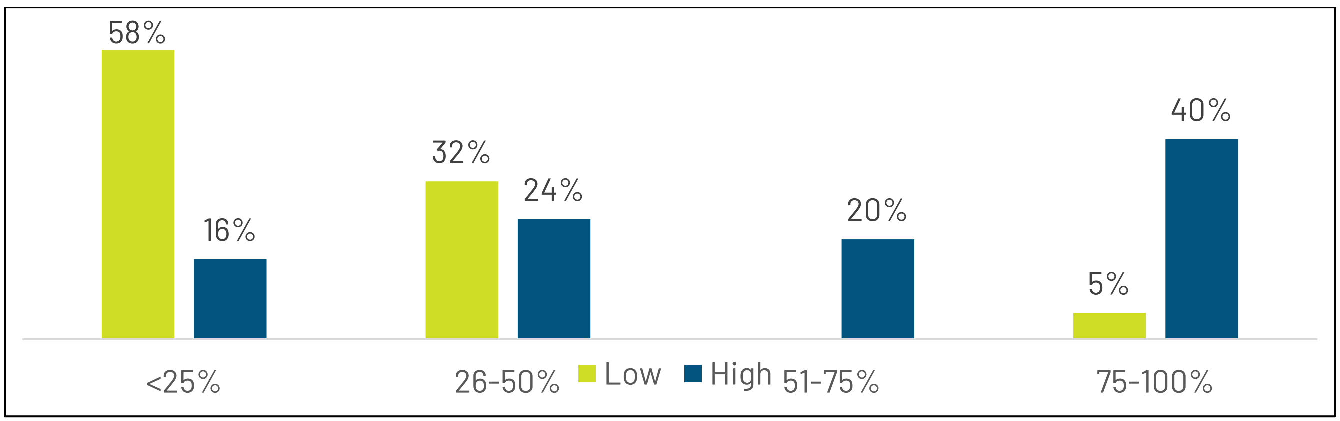
Study participants representing tours and attractions were the largest group within the study sample (24%). Arts, Sports, and Events (8%) is the other subsector explored that largely focuses on delivery tourism experiences. Analysis revealed that most businesses were reliant on fully independent travellers (Figure 21), with tours and attractions also reliant on organized tours. Neither sub-sector focused primary on packaged tours, reinforcing the findings of the previous analysis that found most businesses were not market or export ready (Figure 13).

Figure 21: Market Focus for Businesses Offering Tourism Experiences (n= 29)



Forty percent of operators delivering tours or operating attractions indicated they sold 75% to 100% of their available supply during the peak season, contrasting with only 5% selling at that level during the low season. Fifty-eight percent of operators indicated that they sold less than 25% of the available supply during the low season (Figure 22S).

Figure 22: Percentage of Inventory Sold During Low & High Seasons (n= 29)



SOAR Analysis

Grounded in the traditions of appreciative inquiry, SOAR analyses take a strengths-based approach to analysing the *Strengths*, *Opportunities*, *Aspirations*, and *Results* of a situation as a means of identifying strategic interventions. The analysis provided in this section is based on the results of the first two phases of the data collection and the review of relevant documents such as the Yukon government's strategic plan for tourism, the Conference Board of Canada's labour market analysis for the Yukon and its analysis of Indigenous Tourism, the product gap analysis compiled by Tourism Yukon, and TIA Yukon documents. The following section is divided into four sub-sections and followed by general conclusions and areas for consideration.

Strengths

Analysis of the data revealed that the tourism sector in the Yukon is built on several strengths including:

- Well dispersed and unique cultural and historical products.
- Unique natural landscapes and strong wildlife viewing.
- Well established destination reputation.
- Strong supply of visitor ready products and services that can be enhanced.
- Strong Indigenous self-governance.
- Growing Indigenous Tourism sector.
- Established historic/iconic travel routes (Alaska, Klondike, & Dempster Highways).
- Strong Arts & Culture sector.
- Strong sports and events hosting reputation.
- History of hosting meetings and conferences.
- Existence of a strong aviation sector including Air North which maintains several intra-Territorial routes as well as links to larger Canadian markets.

Opportunities

Analysis of Yukon's travel sector reveals an industry that is still developing and is largely defined by business or visitor ready businesses. The lack of maturity within the majority of the sector provides significant opportunities for diversification and broadening of Yukon's destination image. Identified opportunities include:

- Working with visitor ready businesses to help them become market ready.
- Working with market ready business to help them become export ready.
- Enhancing product offerings outside of the larger communities of Whitehorse, Dawson City, Haines Junction, and Watson Lake.
- Building a convention centre in Whitehorse to accommodate the growing but competitive MICE market.
- Encouraging entrepreneurship, which can attract new residents and keep younger residents in rural communities.
- Developing corridor infrastructure on the historic travel routes (Alaska, Klondike & Dempster Highways).
- Encouraging business development in smaller communities to disperse visitors throughout the territory.
- Increasing tourism sector engagement and collaboration.
- Diversifying the Yukon Brand to expand the destination image beyond the Gold Rush and aurora borealis.

Aspirations

The aspirations listed below are ones that the research team has identified based upon analysis as well as existing strategic documents. As the Yukon's current strategic plan for tourism development was created and launched prior to the 2020 pandemic but is intended to direct development through 2028, it may be worthwhile reviewing and adapting these aspirations in conjunction with a review of that plan. The identified aspirations included:

- Increase low season employment opportunities for tourism and hospitality workers.
- Increase resident and visitor amenities in communities outside of Whitehorse and Dawson City to attract new businesses and residents (i.e., potential employees).
- Create policy frameworks that promote and coordinate sustainable development and growth within the tourism sector.
- Invest in skills and business training to help tourism operators and Indigenous Nations develop more market and export ready products/experiences.
- Invest in critical transportation infrastructure to promote visitor dispersion, reduce travel friction, and enhance destination image.
- Invest in critical communication infrastructure to promote dispersion of residents and facilitate business operations in rural communities.

- Create favourable business conditions for new tourism business owners or those seeking to invest in the tourism industry.
    - This may include improving access to capital for people wanting to purchase existing operations as current operators age out/retire.
- Increase focus on attracting meetings, conferences, and events.
- Develop an incentive travel program to encourage dispersion.

Results

Based upon the analysis of tourism assets, the identified labour market challenges, global forces, and the stated desired for the Yukon and Canada to increase the role of tourism as tool for economic and social development it is important work toward key indicators of success. This will necessitate the development of evaluation matrices and reporting structures that are more reliant on existing reporting (i.e., Wilderness Tourism Operator Annual Reports) and more frequent monitoring of visitor statistics. Evaluation and reporting should not become an additional burden placed on tourism operators who have already identified challenges with accessing government resources and supports.

Based on the other aspects of the SOAR analysis, the identified measurement of success could include:

- Increased visitor numbers and tourism related revenue.
- Increased engagement between tourism businesses and TIA Yukon.
- Increased number of businesses in Whitehorse and Dawson City that are *export ready*.
- Increased number of businesses in Watson Lake and Haines Junction that are *market ready*
- Increased number of businesses in other communities that are *visitor ready*.
- Establishment of business development, entrepreneurship, and skills training programs focused on growing the Yukon's tourism assets, including human resources.
- Increased investment in maintaining the historic, cultural, and natural assets that tourism is reliant on.
- Increased investment in developing Indigenous tourism products and skills/employment training for Indigenous youth.
- Increase number of meetings, conferences, and events hosted across the Territory.

Gaps & Other Identified Ideas

One of the primary purposes of this project was to identify gaps in the tourism assets of the Yukon. The analysis of collected data resulted in the following gaps being identified:

- Food & Beverage options in smaller communities are scarce and sporadically open.
- The quality of attractions available to visitors is not well promoted, particularly in smaller enroute communities.
- Employment programs provided by the Government can require too much work for smaller businesses to take advantage of.
- Smaller operators were not always aware of funding opportunities for staffing or other business operations.
- Housing for employees is a significant issue in most communities and contributes to the difficulty in attracting entry level staff.
- Lack of market ready product makes it difficult for operators and visitors to plan itineraries or feel comfortable that they will find proper services.
- Soft adventure, arts & culture, wildlife viewing, Indigenous Tourism, and sports tourism are all areas for growth that can help broaden Yukon's destination image beyond wilderness and gold rush.

Conclusions & Considerations

The analysis of Yukon's tourism assets and labour market needs revealed the foundation and potential for strong and sustainable growth. This project reinforced the results of other studies and strategic planning processes that have identified labour market development (and access), infrastructure investments, and product development in rural communities as limiting factors to that growth. The lack of market and export ready products limits the ability of Tourism Yukon (and others) from adequately taking advantage of the travel trade and global travel markets. It further limits Yukon's ability to harness the co-operative marketing efforts of Destination Canada and other regional Provincial/Territorial DMOs.

The tourism industry in the Yukon is underdeveloped and is less mature than many of its competitor destinations in Canada. This presents challenges in as the more mature business offerings are located in its two primary destinations, Whitehorse and Dawson City. However, this also presents significant opportunities for sustainable development and market growth.

Diversifying the product mix to include the more mature product offerings (e.g., RV travel along the Alaska Hwy and cruise tourists to Dawson City and Carcross) with emerging high-yield low impact markets such as a wildlife enthusiasts and those seeking authentic Indigenous tourism experiences. There is untapped potential to develop tourism products that promote authentic connections to others, health and well-being, as well as land-based experiences. Markets for these experiences tend to be more educated, have higher incomes, and place more value on sustainability.

Enhancing and expanding assets that allows for the broadening of the tourism season is essential to creating a year-round tourism industry. Recreation, sports, and arts and culture often have seasonal variations that are outside the standard tourism seasons; however, the most flexible tourism product segment would be MICE. With the announcement of funding for a new convention centre in Whitehorse, the Yukon is positioned to use attract meetings, conferences, and events in the shoulder/low seasons. However, to fully realize the potential for this market, incentive programs and add-on itineraries that include moving visitors from Whitehorse to the rural communities is also needed.

A common theme throughout all reports, strategic plans, and research on the tourism in the Yukon is the need for investments in skills training and entrepreneurship development. While some of this can be addressed through public-private partnerships and special one-of programs, there is a need for the development of community-based and territorial-based tourism and hospitality education opportunities. To address the labour force participation gaps identified by the Conference Board of Canada (2025a; 2025b) and the address the labour force impacts of recent immigration changes, stakeholders in the tourism industry, post-secondary education providers, and the Yukon Government will need to collaborate and develop long-term sustainable training and education programs.

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