

**The Yukon
Nodal Development Plan:
The Untapped Opportunity**
TIA YUKON



We're discussing Nodal Destinations Development

Nodal Destinations are described
as a visitor **gravitational points ...**

with a **critical mass** of attractions and services ...

that have the potential to **attract visitors,**

make them spend

and make them stay

- .



Why today?

That's what travellers want:

- enhanced and higher quality experiences
- access to certain services and comforts

Formula for success applied around the Globe

It can be engineered, designed



Objectives of the mandate

1. Identify GAPS for Dawson City and Whitehorse
2. Identify projects for Dawson City
3. Identify projects for Whitehorse
4. Demonstrate the viability and return on investment
5. Provide framework tools



The Team:

- **Stephan Morency**, Chief Strategy Officer, Amuse, Business, Financial and Economic Development, Strategist, Lead on business plans and Overall project leadership support
- **Monica Ruffo**, Chief Executive Officer, Amuse, Business Leader and Marketing Strategist, Overall Project Leader
- **Mark Wickham**, Dawson City, Business Strategist and Community leader, Dawson City working group facilitator
- **Michael Pealow**, Whitehorse Economic Development Strategist, contributor to LIM review



Delivered value:

- **Marion Joppe**, PhD, Research Chair in Tourism, School of Hospitality and Tourism Management, University of Guelph, Lead on Matrix development and Gap Identification
- **Joseph Pine II**, member of the advisory board of Amuse, best selling author and tourism consultant, (The Experience Economy, Authenticity) advisor on Matrix Development and trend forecasting.
- **Jane Koekpke**, Whitehorse consultant, Whitehorse representative and contributor to research and data collection and review.



Delivered value:

1. The Amuse Abridged Nodal Framework
2. The Gaps assessments
3. The Projects
4. The Business Cases
5. The LIM
6. The Amuse Abridged Nodal Framework Toolbox



The Amuse Abridged Nodal Framework

An adaptation of the Premier Ranked Tourism Destination (PRTD) Framework:

- Developed and funded by the government of Ontario
- Tested and gave results in dozens of markets
- Cost 2M\$ to develop and 24 months of work



The Amuse Abridged Nodal Framework

Product Dimension

Performance Dimension

Sustainability Dimension



The Amuse Abridged Nodal Framework

Product Dimension

Distinctive Core Attractors

Quality and critical mass

Satisfaction and value

Accessibility

Accommodation base

Performance Dimension

Sustainability Dimension



The Amuse Abridged Nodal Framework

Product Dimension

Performance Dimension

Visitation

Occupancy and yield

Critical acclaims

Sustainability Dimension



The Amuse Abridged Nodal Framework

Product Dimension

Performance Dimension

Sustainability Dimension

Destination marketing

Product renewal

Managing within carrying capacities



The Amuse Abridged Nodal Framework

A 6 WEEKS PROCESS

Introduction to the working group of the Matrix tools and methodology

Research gathering and review

Grids and questionnaire population

Framework population

Gaps identification

Gaps prioritisation



The Amuse Abridged Nodal Framework

A 6 WEEKS PROCESS

Part time Consultant with integrated knowledge of the Matrix

Full time project champion from the destination with integrated local knowledge and important industrial network in the community

Dedicated and available working group made up of commercial and institutional representatives of the industry.

These elements are essential **keys to success**



Major trends affecting tourism

Industry Trends of Interest:

1. Economic Downturn Has a Profound Impact on Market Trends 2009-2011:
2. Adventure Tourism is Soon Entering Next Stage of Maturity



Major trends affecting tourism

3. **Ancestral Heritage or Aboriginal Tourism Products Are Becoming a Significant Motivator for Travellers Visiting Canada**
4. **Internet Was by Far the #1 Source of Travel Planning and Purchasing. However, the Consumer is Becoming the Medium Via Social Media and Networking Sites**



Major trends affecting tourism

5. Business Travel and MC&IT Are Looking for Cost Containment
6. More Demand by All Travel Segments for “Orientation and Facilitation”
7. Generational Shifts: Boomers Retiring, GenX in Peak Earning Years, GenY Stays Home



What we did for Dawson City: GAPs assessment

Building on Strengths

Klondike history:

Dawson City and architecture

Performing or promising Klondike theme supporting attractions

Large range of Klondike history-related activities

Opportunities for developing distinctiveness:

Authenticity (What they imagine in Alaska, they'll find in the Yukon and especially in Dawson City)

History/Scenery all-in-one packages potential



GAPs Assessment: Dawson City

Gaps Identification

Product Dimension

Unleveraged distinctiveness:

No clear product positioning for Dawson City

No real core iconic attractions

Overly dependent on regional complex

Limited offer for on-theme activities related to scenery and ancestral heritage



GAPs Assessment: Dawson City

Gaps Identification

Sustainability Dimension

Insignificant destination marketing resources:

Insignificant funds allocated to marketing

Lack of sophisticated packaging ability to leverage tour operators distribution capacity

Lack of independent Dawson City packages and promotion, which can attract higher yield and length of stay

Lack of conjoint heritage/scenery-related packages and promotion

Dawson City's positioning is perceived as being misaligned with Yukon's marketing efforts



GAPs Assessment: Dawson City

Gap Prioritisation

Start Turning
the Wheel by
Focusing on
Causes

These identified GAPs are causes...

*Unleveraged distinctiveness
Underdeveloped critical mass
Extreme seasonality factor
Limited ability to package and market Dawson City*

They are responsible for ...

*Decreasing visits and yield trends
and therefore tremendous
economical pressures*

That as a consequence...

*Reduce the destination's ability to offer adequate ...
Accessibility
Accommodations
Overall reinvestments
Labour resources*



The projects

The Filter for Identifying Projects

1. **Address causes** of the problems, not consequences
2. **Are privately driven** and have the ability to attract private capital
3. **Have the ability to bridge the Gaps**. Something that is missing for Dawson City to be an efficient Node
4. **Must not accentuate other existing Gaps** or create new issues
5. **Attract visitors with higher yield and for longer lengths of stay**
6. **Can be implemented in a 12-24 months period**
7. **Baby step**



The projects

Recommended Projects

- **Receptive outdoor activities operator:** bridges the “Limited offer for on-theme activities related to scenery” gap
- **Tr’ochek heritage site:** Bridges the « Limited offer for on-theme activities related to ancestral heritage” gap
- **Commissioned agent:** Bridges the “Limited ability to package and market Dawson City” and “No easy central point of sales gaps



The projects

Desired Nodal Ecosystem

**Increase
attractiveness of
what you sell**

**Match offer
with
demand**

**Ease accessibility to
buy**

*Receptive scenic
activities operator*

Tr'ochek heritage site

*Other existing tourism
offers*

*Commissioned
packaging and
promotion agent*

*Retail through central point
of sales*

*Wholesale through tour
operators*



The projects

Other Considered Project:

Palace Grand Theatre Show:

Bridges the “No real core iconic attractions” gap

Not the typical business case

Demonstration of interest because of market positioning

Next steps : Feasibility study and validation interviews with Cirque du Soleil, Cirque Éloize and other national or international entertainment players to determine business case variables



You can do it now

The Amuse Abridged Nodal Framework Toolbox

- The Guide
- The Stakeholders Questionnaire
- The Inventory Grids
- The Facilitation Presentation
- The LIM Handbook
- The LIM Assessment tool



**Key success factor #1 is
commitment for 6-8 weeks**





Yukon Nodal Cluster

Northwest
Territories

British
Columbia

Gulf of Alaska

Whitehorse

Stagway

McCarthy

Copporville

Whitehorse

Eagle

Circle

Fort Yukon

Arctic Village

Uukoyaktuk

Yakutat

Yukon

Valdez

Delta Junction

North Pole

Beaver

Chandalar

Whittier

Palmer

Hoonah

Pelican

Angoon

Stagway

Haines

Yakutat

Cape Yakataga

Whittier

Palmer

Hoonah

Pelican

Angoon

Stagway

Haines

Yakutat

Cape Yakataga

Whittier

Palmer



\$ 2MM

Yukon
Nodal Cluster

\$ 5MM

This could be the opportunity...

...to unfold what could be the most important plan for the future **wealth** of the Tourism Industry in Yukon.

A collective initiative that could make you gain access to ...

A **7MM\$** tourism market

