



## **Tourism Sector Strategy and Business Plan**

**April 21<sup>st</sup>, 2007 Workshop Session Findings**

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## 1.0 Introduction

The Tourism Sector Strategy and Business Plan, prepared under the direction of TIA Yukon was just getting started in mid April, 2007. The opportunity to meet with the industry at the TIA Yukon Annual General Meeting on April 20<sup>th</sup> and 21<sup>st</sup>, 2007, despite the early stage of the project, could not be missed.

On the afternoon of April 21<sup>st</sup> approximately 50 industry participants provided their input in a number of areas relevant to their Vision of tourism in the Yukon in the next decade or two.

## 2.0 The Process and the Questions

The process involved several steps:

- Individuals were given a set of questions on April 20<sup>th</sup>, so they could prepare their individual responses, passing those to the facilitators on April 21<sup>st</sup>.
- The participants on April 21<sup>st</sup> were asked to rank the top three issues they would like to speak to in a round table format.
- Eight tables, each related to a specific area of the vision, were set.
- Three rounds of input were organized, so people could actually sit and add their views to those of others who had provided input before them.
- Finally, the charts were organized at the front of the room so participants could read and add input individually.
- People were also asked to write down the three most important challenges and the three most important opportunities they thought the Yukon faced. These comments were handed in and collated by the facilitators.



The following specific questions were asked of Participants:

## VISION FOR THE YUKON TOURISM DESTINATION

Please picture where you would like the Yukon to be *as a tourism destination* in ten or more years. Your ideas will guide research and business planning for the destination.

Consider some of the elements of a vision as identified below. What does success look like in each of the following areas?

- **Tourism and the Economy** (How big is tourism, what priority does it receive, employment, GDP, and its growth rate?)
- **Tourism Infrastructure** (Roads, air, accessibility, signing, telecommunications, community support services could be considered.)
- **Tourism Attractions** (What type of major attractions, both Natural and Man-Made, draw the market? Where are they? Where are our growth regions, highway corridors?)
- **Tourism Services** (What type, quality of accommodations, F &B, retail, information/direction, human resources?)
- **Markets** (Where do our visitors come from? Broadly, what volumes, characteristics?)
- **Marketing** (How do we do marketing, who leads, who funds, and how is the money raised?)
- **Organizational Capacity** (How are we organized as a destination to develop tourism, market tourism and ensure quality service: Roles and responsibilities?)
- **Tourism Investment** (Who is investing - outsiders, local? What incentives approaches are attracting investment? What investment programs do you see?)



### 3.0 The Vision of the Industry

The vision of the participants in this session is summarized below under the headings in which they were asked to comment. In each case the vision is phrased as a condition that exists in the Yukon at some time in the future.

#### 3.1 Tourism and Economy

- Tourism is viewed by Yukoners as a valuable industry which makes a positive contribution to a better quality of life, provides year round revenue and employment, and generates an economic return to the territory. Tourism contributes to a well-rounded, balanced and sustainable economy in the Yukon.
- Tourism is on an equal footing to other industry sectors from a government policy perspective, and it is one of the central pillars of government's economic strategy. Politicians and the public understand and appreciate the tourism industry as a sustainable means to diversify the Yukon economically.
- The tourism industry grows in size and stature, achieving the \$500 million level by:
  - Becoming a year round sector through strategic increases in shoulder and off-season tourism operations;
  - Achieving increased private sector margins, more private investment, and attracting higher paying jobs and business revenues; and
  - Attracting markets willing to pay fair value for an exceptional tourism experience.

#### 3.2 Tourism Infrastructure

Yukon infrastructure is coordinated, renewed and upgraded in part to meet the needs of the guests of the Yukon as well as its residents.

- Cell phone service reach expands to more areas of the territory; both North American and European systems are provided (CDMA and GSM).
- Air access, domestically and internationally, improves and prices for airfare are increasingly competitive with other destinations; airports are improved, direct flights to Yukon increase, and direct large jet access to the Dawson City airport is provided.



- Careful planning of new and existing parks and restricted areas ensures increased access is fostered while meeting the mandate of protection, preservation and presentation of these areas for Yukoners and our guests.
- Partnerships of government and industry ensure more carefully planned and more coordinated infrastructure is provided with emphasis on:
  - Trails for non-motorized and motorized uses, where appropriate, are planned in an around the nodes of tourism activity in the Yukon, making the region more accessible to visitors;
  - Coordinated, themed road signage in all tourism regions of the Yukon ensure visitors are aware of attractions; high quality, themed pull-offs provide interpretation of the region to both visitors and guests; and
  - Road maintenance and quality is sufficient to support the type of traffic each region experiences; road conditions are no longer a liability of the tourism destination.

### **3.3 Tourism Attractions**

Participants offered a great deal of input into their vision for Yukon attractions in the future. These have been organized in large themed areas following.

#### *3.3.1 Presenting Yukon Nature*

- Yukon Nature is core to the Yukon Brand. The natural icons of the Yukon become central to the brand: Kluane, Mount Logan, Tombstones, the Arctic Circle and tundra, Kaskawash glacier. These icons are accessible to tourists, and are presented as accessible in our brand marketing as some of the most amazing natural features in the world.
- Natural icon areas are made accessible; e.g., road access to Kaskawash glacier, gondola access to Kluane. The presentation of these places is given a place beside their protection and preservation, and the tourism industry is committed to their sustainability.
- Icons such as the Tombstones, the Dempster Highway, and others are marketed and positioned for their colors, accessible wilderness, accessible Arctic tundra, wildlife, and Tombstone peaks and hikes. The attractions are developed



sufficiently to support the tourism markets that are interested in these natural wonders, while maintaining the wilderness character of the place.

- More and better access to potential wilderness areas and wildlife viewing locations/experiences is developed, with interpretation of the experience provided in an appropriate form (guided or self-guided).
- More experiential, interactive, and responsible/eco-friendly tourism products are developed to animate the experience of nature and our culture. The Yukon is a shining example of sustainable tourism policies, practices and operations across all subsectors of tourism.
- The need for parks, wilderness areas and wildlife sites remains a priority of the Yukon government; tourism builds the demand for carefully controlled and protected areas.
- The wild rivers (our highway of the past) of the Yukon, such as Alsek/Tatshenshini, Peel and Firth are presented and positioned as accessible wilderness experiences for visitors; market interest builds.

### 3.3.2 *Presenting Yukon Culture*

- While the Klondike heritage remains a core part of Yukon cultural tourism, our presentation expands to embrace our aboriginal heritage and peoples, our historical figures who are animated in our cultural places, and our natural history is interpreted for tourists:
  - More historical tourism products/interpretation is done; existing museums are better utilized to animate history, cultural centres and historic sites provide high quality tourism experiences for visitors;
  - More cultural events are developed in tourism centres, attracting more visitors to the entire region;
  - More and better marketing of Dawson, Gold Rush history, the building of Dawson, and the stories (Service and London) brings renewed interest in the region; and



- The momentum built in the Gathering of Nations is combined with Aboriginal Day to create a truly authentic, meaningful learning experience for visitors and Yukoners. Whitehorse becomes THE place in Canada where you want spend National Aboriginal Day in Canada. Events in other communities gain in reputation and interest from this major event.
- Dog sledding is positioned as part of the Yukon culture; the Yukon Quest builds winter tourism; operators provide a wide range of tourism experiences around dog sledding heritage, from guided multi-day excursions to short learning experiences;
- The Yukon River is developed and positioned as an experience of a lifetime; the communities along its length are interpreted for their history and cultures; Fort Selkirk is animated and becomes a major stopping point on the river; the viewable wildlife along the river, its historic alignment with the Dawson Trail, and the stories of privation and success along its waters is animated for the visitor; a variety of tourism operators and products can be found along the historic waterway, yet its fundamentally wilderness nature is preserved.
- The Canada Games Centre is used to build sport tourism to the Yukon.

### 3.3.3 *Tourism Product Offerings Include High End Products*

More high-end products that provide a high return on investment and appeal to the higher income markets are developed:

- Road accessed, icon lodges are developed at strategic locations at the “edge of wilderness”; these complement the existing fly-in lodges, some of which are already high-end products;
- Ground operators provide a wide range of truly exceptional experiences for guests of high-end lodges, offering a wide variety of tourism experiences around the central development; and
- High-end touring products (such as Great River Journey) are developed to provide a safe, high-end wilderness experience for the well-heeled.



### **3.4 Vision for Tourism Services**

- Yukon's tourism industry is the champion of quality service delivery and stewards for the growth of tourism; this commitment improves other sectors of the Yukon economy:
  - The accommodation sector embraces training, increases business acumen, develops tools and means to limit the impact of seasonality, and improves its overall service levels across the board;
  - Critical standards for tourism products are defined, and Yukon accommodations, attractions, and services meet standards of quality regardless of price point; and
  - Many Yukon accommodation and service facilities are market- and export-ready, and those products are appropriately signed and promoted to the market.
- Yukon Tourism Visitor Information Centres evolve to a more integrated sales and service approach to visitors:
  - They interact with visitors, allowing them to make recommendation and describe their experiences via electronic or manual "bulletin boards".
  - They become a meeting place for travelers to find out from each other what's to do - coffee shop/Internet cafe, bulletin boards; and
  - VIC staff support visitor to visitor interaction.
- The highest priority for Yukon roadside and directional signing is tourism. Sign displays are clear, helpful, convenient, affordable, and are themed for each region.
- High quality roadside pullouts are developed in strategic locations and become desirable stopping and meeting places for travelers. They include:



- Washrooms, picnic tables;
  - Kiosk information boards with map overviews;
  - Business information; and
  - Phones and notice boards – these roadside pullouts then become a stopping and meeting place for travelers.
- Yukon industry and government facilitate, through policy and the provision of business support tools, the growth of more tourism business products that meet market demand.

### **3.5 Markets for the Yukon**

- Yukon domestic markets grow, Yukoners increasingly experience their own destination, and that increase attracts Visiting Friends and Relatives (VFR) to experience the Yukon.
- A strategic approach to identifying and capturing international markets is in place; industry and government set goals, objectives and strategies together; yields from international markets improve.
- Yukon presents a strong mix of culture, nature, and urban/community tourism experiences under its brand.
- The high end, family market is attracted to safe, unique, amazing and exotic tourism experiences; they tell other like-minded families about this experience and the brand grows in value.

### **3.6 Marketing the Yukon**

- Government and TIA Yukon, through its Senior Marketing Committee, develop and follow a stepwise, research-based, strategic method of selecting market segments and of addressing those segments with strategies and plans; their work is transparent, clear, and strongly supported by industry and the public:
- Planning and execution of marketing consistently uses research and tools to measure ROI from marketing; and
  - Industry is educated and trained in practical tourism marketing, and they support marketing plans and strategies developed by SMC/government.



- Marketing is increasingly based on “Pay to Play” approaches, where promotion initiatives depend on the financial participation of the industry. Innovative methods of attracting industry support and leadership have made the pay to play system very effective. Industry leads the investment in tourism marketing; industry increasingly determines what approaches are most effective for them.
- Yukon marketing is more aggressive, industry-led, and based on measurable returns to its efforts.
- The TCMF continues to be a major source of collaborative marketing, and tourism businesses are increasingly required to present well-researched offers for collective marketing action.
- YTMP continues to be a line item for government, funding tourism marketing at a level which allows the industry to be effective in the competitive marketplace.

### **3.7 Organizational Capacity**

- TIA Yukon and government work seamlessly, collaboratively, and transparently to plan, execute and measure initiatives focused on building the tourism sector in the Yukon. Formal, regular communication processes ensure industry is aware of the efforts and their outcomes.
- Service quality is job one. Better information, standards, training programs, incentives for training, and recognition of businesses and individuals providing great service and training is fostered through industry/government initiatives.
- TIA Yukon becomes a central focus for business-to-business collaboration in marketing and product development. TIA helps foster joint business ventures and joint marketing schemes; TIA works with government to adjust marketing and product development programs and incentives to what works best for industry.
- TIA leads in changing the business mindset from one of competition with each other internally to a view that the world is larger, the Yukon is special, and we are collectively inviting them to be our guest; collaboration rather than competition is the theme internally. We compete externally.



### **3.8 Tourism Investment**

- Most Yukon businesses were undercapitalized. Efforts by TIA Yukon and government attracted capital pools to partner with existing operators and to develop new product and tourism experiences in the Yukon. The result was the growth of all markets, improved quality, and increased income to industry and government.
- TIA Yukon provided leadership with industry and government to define the considerations, the conditions and the incentives needed to attract significant, experienced outside investors to partner in Yukon product development.
- Access to capital within the Yukon has improved, thanks to creative efforts of TIA Yukon, government, First Nations and bankers. Yukoners are increasingly confident in investing their equity in Yukon businesses and entrepreneurs.
- Efforts of TIA Yukon, government and First Nations have created greater opportunities for access to land in the Yukon.



## 4.0 Summary Of Key Issues And Opportunities

Key issues and opportunities are summarized from hundreds of individual comments that were captured in sheets handed in on April 21<sup>st</sup>, 2007. They not presented in order of importance.

### 4.1 Key Tourism Issues

- **Brand Awareness and Differentiation:** The Yukon lacks Brand awareness as a destination, and in the large world of (esp adventure) tourism, the Yukon is not differentiated as it needs to be.
- **Product and Tourism Experiences:** The Yukon lacks unique experiences specific to the north. This is most significant in the area of wilderness and culture product and a mixture of the two (these issues link to land use planning, park development, land availability and investment). The spectacular landscapes of the Yukon provide ample raw materials for exceptional presentation, so development of experiences can be achieved with concerted effort.
- **Quality Service Standards:** Yukon service and quality of product delivery does not always meet the required standards. Although the issue varies across tourism sub-sectors, it is especially evident in the accommodations sector. Implementing measurable standards across all sub-sectors and policing them with industry support in required.
- **Human Resource Issues:** Related to the quality issue is the issue with capacity, training and supervision of human resources in tourism. Attracting, retaining and inspiring human resources has never been more difficult or more critical.
- **Basic Accessibility Issues:** Transportation infrastructure, especially such as road quality and air access can be improved. Universal cell phone access is required.



## 4.2 Tourism Opportunities

- Target Markets and Marketing: Opportunities to position Yukon for its untouched wilderness.
- Product Development: Opportunities to brand icons, develop new products, and provide better access. Examples:
  - New iconic “Yukon” branded products will grow industry and position the Yukon. Examples include parks such as Tombstones, gold rush race, and First Nation cultural products and events.
  - New product development such as sporting events, cultural products and interpretation, English as a second language (ESL), health and wellness and tourism products focusing on the arts.
  - More well planned wilderness products including accessibility and tourism product development in (and near) parks and wilderness areas. Accessible high-end lodges and spas would be one example.
- Tourism services can be improved. The role of Visitor Information Centres (VIC) could be strengthened and better utilized, creating one-stop shops for visitors.
- Opportunity to attract more investment, create better access to capital and provide access to land for responsible development of unique, iconic, and quality products. This must happen if product development is to occur.

