



Yukon Jurisdictional Scan, Phase 2 Report

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Executive Summary

Yukon Department of Tourism and Culture commissioned this Jurisdictional Scan to better inform its future Tourism Strategic Plan process and focus. The scan is broken into Phase 1: Iceland, New Zealand, Australia and Newfoundland and Labrador, and Phase 2: Greenland, Canada, British Columbia and Alaska.

The scan reviews destinations that share similar challenges to Yukon: perception of distance, product similarity and population density (namely Greenland, Iceland and Newfoundland and Labrador), as well as destinations Yukon strives to emulate in terms of marketing, Indigenous tourism development, mitigating overtourism and product development (namely Australia, New Zealand and Iceland, Canada and BC.) It includes key takeaways Yukon can consider when creating its Tourism Strategic Plan.

How to read this document

This document references secondary research and interviews conducted by the research team. Reports referenced are hyperlinked (meaning, when read on a digital device, the user can click on the underlined word and a new window will open directly to the report) and footnoted. A ‘DropBox’ with all reports is also available [here](#). Text in *Italics* indicates a direct quote from a report (which is also either footnoted or hyperlinked). If you have any questions about this report, please contact Jillian Dickens at jillian@bannikin.com.

Methodology

From July 14th to August 16th, 2018, the Bannikin Travel & Tourism research team reviewed secondary documents, accessed online, and interviewed representatives from tourism boards and tour operators based in the destinations in question. The results were compiled for the report. A complete matrix with reports reviewed and interviews conducted is attached as Annex 2.

Key Findings

The following section outlines each jurisdiction's approach to various components of destination planning and policy making.

A. Organizational Structures

This section outlines the various organizational structures at each destination, specifically where tourism development, oversight and marketing sits within government. Given the divergence in when and how tourism has developed at each destination, there is discrepancy as to the level of priority that tourism has received in addition to the level of complexity amongst their tourism structures.

Australia

Organization	Mandate	Type
Commonwealth Government Department of Resources, Energy and Tourism (RET)	The Commonwealth Government Department of Resources, Energy and Tourism (RET) delivers government tourism policy. ¹	Government (Federal)
Tourism Australia	Tourism Australia is governed by a Board of Directors who report to the Federal Minister for Tourism. Tourism Australia is the Australian Government-funded agency responsible for marketing, international operation and distribution, corporate affairs government and industry relations. At the federal level, Tourism Australia coordinates with state and territory governments and the private sector, to market Australia to the world. ²	Crown Corporation (DMO)
State Tourism Organizations (STOs)	<i>Each state has individual state tourism organizations (STOs) to support development & marketing of their industry suppliers³. STOs do the 'heavy lifting' in terms of industry development. Most of their work is focused on the local market suppliers and doing domestic marketing, while the global international marketing is left to Tourism Australia.</i>	Regional DMOs
Regional Tourism Organizations (RTOs)	Regional Tourism Organizations (there are about 80 in Australia, 8-10 are quite active) are meant to strengthen local tourism businesses by liaising with regional tourism authorities and state bodies on behalf of operators. <i>Australian Regional Tourism Limited is the peak national body representing regional tourism organizations.⁴</i>	Destination Management Organization
National Tourism and Aviation Advisory Committee (NTAAC)	<i>NTAAC formalises the relationship between major tourism stakeholders to provide advice to RET, the Department of Infrastructure, Transport, Regional Development and Local Government (DITRD LG) and the TMC.⁵</i>	Government (Federal)

¹ (National Long Term Tourism Strategy, Australian Government Department of Resources, Energy, and Tourism, 2009)
<https://www.austrade.gov.au/ArticleDocuments/5499/DRET%20Tourism%20Strategy.pdf.aspx>

² <http://www.tourism.australia.com/en/news-and-industry-tools/resources-for-industry/whos-who-in-tourism-industry.html>

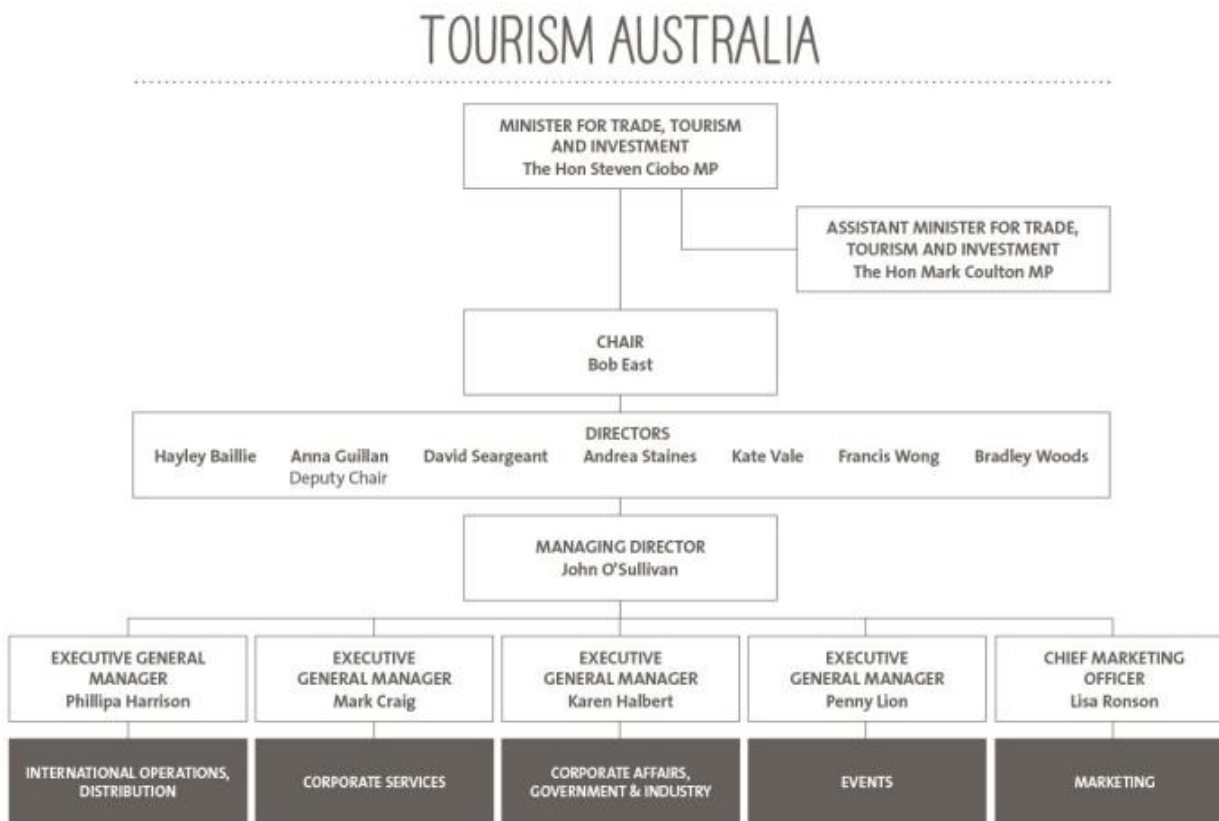
³ <http://www.tourism.australia.com/en/news-and-industry-tools/resources-for-industry/whos-who-in-tourism-industry.html>

⁴ <http://www.tourism.australia.com/en/news-and-industry-tools/resources-for-industry/whos-who-in-tourism-industry.html>

⁵ (National Long Term Tourism Strategy, Australian Government Department of Resources, Energy, and Tourism, 2009)
<https://www.austrade.gov.au/ArticleDocuments/5499/DRET%20Tourism%20Strategy.pdf.aspx>

Organization	Mandate	Type
Tourism Ministers' Council	At the inter-jurisdictional level, the Tourism Ministers' Council (TMC) is the principal forum for discussing tourism policy matters of mutual interest to the Commonwealth, the states and territories, and New Zealand. The TMC will engage actively across the full range of issues; this will mean tourism ministers engage across portfolios to address issues such as planning and regulatory approvals processes, infrastructure development, labour and skills development, environmental management and Indigenous engagement in the tourism industry. The Australian Standing Committee on Tourism supports the TMC. ⁶ Australian Standing Committee on Tourism (ASCOT) objectives are to improve cooperation and coordination of Government Policies and activities to implement Tourism 2020 and tourism policy matters. It is in an Interjurisdictional and international body.	Government (Federal)

Figure 1: Organizational Chart of Tourism Australia & Reporting Structure to Government⁷



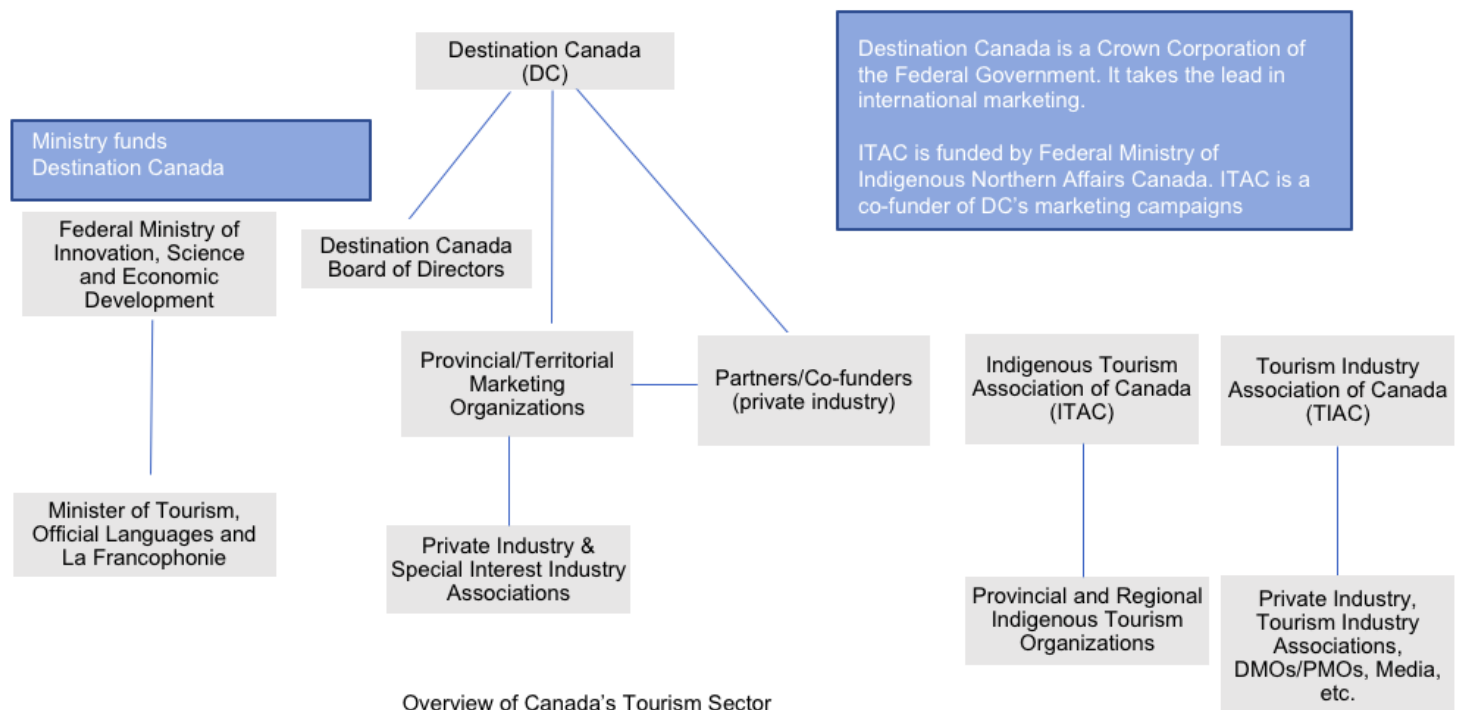
⁶ (National Long Term Tourism Strategy, Australian Government Department of Resources, Energy, and Tourism, 2009)
<https://www.austrade.gov.au/ArticleDocuments/5499/DRET%20Tourism%20Strategy.pdf.aspx>

⁷ <http://www.tourism.australia.com/en/about/our-organisation/our-management.html>

Canada

Organization	Mandate	Type
Ministry of Innovation, Science and Economic Development	Funding Ministry for Destination Canada. Supports regional development through regional development agencies like Atlantic Canada Opportunities Agency. Tourism mandate falls under Minister of Tourism, Official Languages and La Francophonie.	Ministry (Federal)
Destination Canada	Mission to grow Canada's tourism export revenues and support industry partners through industry knowledge, tools and insights. Primarily international marketing organization.	Crown Corp. DMO.
Indigenous Tourism Association of Canada	Supports Indigenous tourism operators and communities through economic development advisory services, conferences, professional development, training and workshops, industry statistics and information	Industry Association
Travel Industry Association of Canada	National private-sector advocate for Canada's tourism sector.	Industry Association
Provincial/Territorial Marketing Organizations	Co-marketing partners of Destination Canada, in addition to marketing and advocacy for their provinces and territories.	DMOs (provincial and territorial)

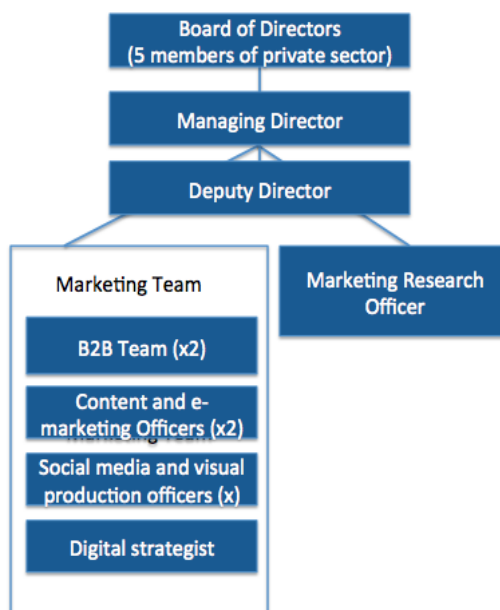
Figure 2: Overview of Canada's Tourism Sector



Greenland

Organization	Mandate	Type
Visit Greenland	Marketing Greenland to adventure and cruise tourists around the world, and in collaboration with regional and international partners. Continue to build a competitive tourism brand. Improve the framework conditions for a successful tourism industry.	Company wholly owned by Government of Greenland (Public)
Ministry of Industry	The tourism portfolio sits under the Ministry of Industry and Energy. The Ministry has their own Tourism Development Plan '2016 to 2020 titled 'What Should Tourism in Greenland Look Like?' Their plan is focused on infrastructure development, especially new airports. This is a contentious plan - with Visit Greenland, especially preferring to focus on increasing the value of tourists, rather than the number.	Government (Federal)
Municipalities	The four municipalities in Greenland each have a tourism function, which is tasked with building the workforce capacity in each region.	Government (Regional)

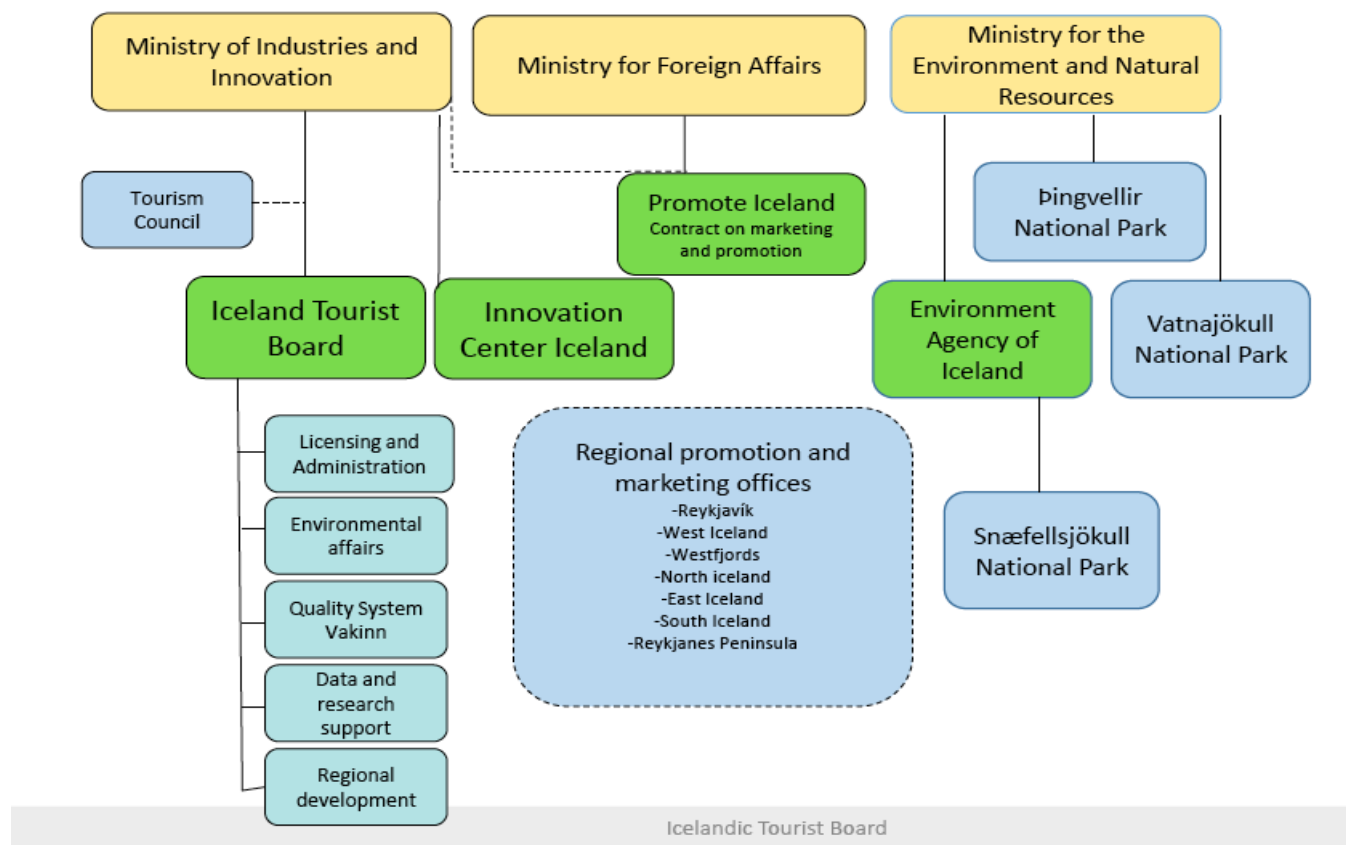
Figure 3: Organizational Structure of Greenland as recounted in interviews.



Iceland

Organization	Mandate	Type
Ministry of Tourism, Industry and Innovation	Leads Iceland's economic development agenda.	Government (Federal)
Icelandic Tourism Board	Independent authority under the <u>Ministry of Industries and Innovation</u> . Responsible for granting licenses and legislation, quality assurance, research and statistics, regional development, environmental issues, distribution of information, cooperation with other tourism related agencies.	Independent Authority (under Federal Ministry)
Promote Iceland	Public-private initiative which leads Iceland's promotion and marketing in foreign markets and stimulating economic growth through increased export. Have different marketing boards on different subjects, but mainly tourism.	Public/Private Partnership
Icelandic Travel Industry Association	Membership-based industry association, in place to advance quality, safety and professionalism of its members.	Industry Association
Icelandic Tourism Research Center	University of Iceland, the University of Akureyri, Hólar University, The Icelandic Tourist Board and The Icelandic Travel Industry Association cooperation with mandate to improve and promote tourism research in Iceland.	Cooperative - Public/Private Partnership
Icelandic Tourism Council	Advisory Board to Ministry with main mandate regarding marketing and includes the ministry, the Icelandic Travel Industry Association , the Association of Local Authorities in Iceland, the Iceland Tourism Association, and Promote Iceland.	Ministry Appointed Council
Tourism Task Force	2015 - 2020. Coordinate and implement tourism policy. Includes: - Minister for Industry & Trade - Minister for Finance & Economic Affairs - Minister for Environment & Natural Resources - Minister for Home Affairs - Chairperson of the Icelandic Travel Industry Association (ITIA) - Deputy Chairperson of ITIA - Managing Director of ITIA - Director of IcelandAir Group	Public Private Task Force
Regional DMOs	Regional industry representation. Are conduits to Icelandic Tourism Board. Financed ⅓ from ITB, ⅓ from regional government and ⅓ membership.	DMOs(Regional)

Figure 4: Organizational Chart of Iceland's Tourism Sector⁸



⁸ (Icelandic Tourism Board, Tourism in Iceland Growth and Challenges Report, <https://www.dropbox.com/home/YUKON%20JURISDICTIONAL%20SCAN/Iceland?preview=ITB+tourism+in+Iceland++english+2018.pdf>)

New Zealand

Organization	Mandate	Type
Ministry of Business, Innovation and Enterprise	Tourism in New Zealand falls under the purview of the Ministry of Business, Innovation and Enterprise. This includes overseeing the Tourism Infrastructure Fund which provides up to USD\$17 million per year for the development of tourism-related infrastructure such as carparks, freedom camping facilities, sewerage and water works and transport projects. The fund supports local communities facing pressure from tourism growth and in need of assistance – areas with high visitor numbers but small ratepayer bases, for example. ⁹	Government (Federal)
Tourism New Zealand	Tourism New Zealand is the marketing agency responsible for promoting New Zealand as a tourism destination internationally. It is a Crown entity established under the New Zealand Tourism Board Act of 1991. The main marketing tool of Tourism New Zealand is the “100% Pure New Zealand” campaign. The main channel for Tourism New Zealand’s work is newzealand.com ¹⁰	Crown Corporation (DMO)
Tourism Industry Aotearoa (TIA)	TIA is an independent association representing all sectors of New Zealand’s tourism industry and around 85% of the total tourism industry in New Zealand. TIA works in frequent partnership with Tourism New Zealand (the two entities were leaders on the <i>Tourism 2025</i> strategy) but also, as an independent association, can lobby government on behalf of the industry, which Tourism New Zealand cannot do as a government funded agency. ¹¹	Industry Association
New Zealand Māori Tourism	NZMT, established by the Ministry of Business, Innovation & Employment in 2004, is a separate entity, working specifically with the Māori tourism sector to contribute to the economy, to provide compelling visitor experiences, and to build a strong commercial and cultural leadership. The group supports leaders and partnerships that generate value in the Māori and wider tourism sector. To achieve this, NZ Māori Tourism established the Māori Tourism Action Plan.	Crown Corporation
Regional Tourism Organization	Regional Tourism Organization is the peak body for New Zealand’s Regional Tourism Organizations, and aims to encourage better coordination amongst RTOs as well as ensuring collectively RTOs are engaged in and consulted on issues critical to the development of the regional tourism sector in New Zealand. The individual RTOs fall under the jurisdiction of city and district councils, working in partnership at the regional level with economic development agencies. ¹²	Government (Regional)

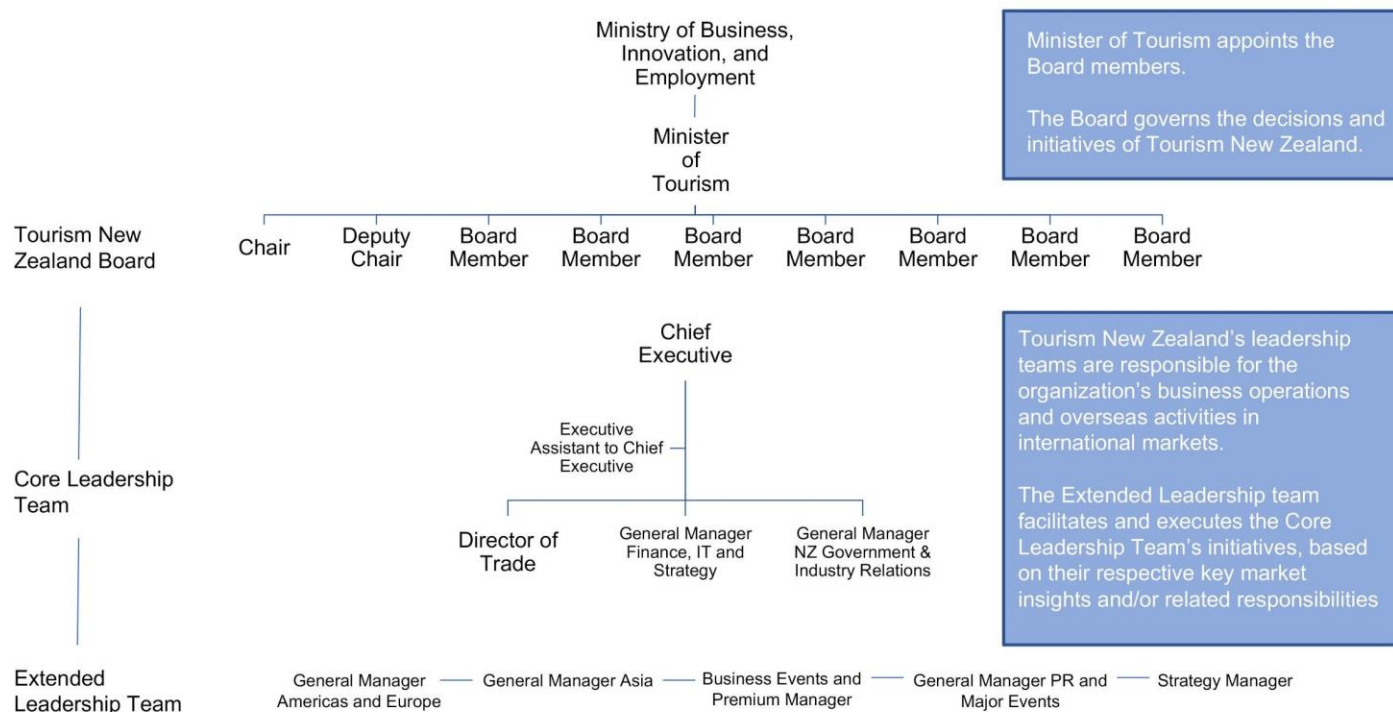
⁹ (Tourism New Zealand, Directory of Official Information, Ministry of Justice, 2007)

¹⁰ (Tourism New Zealand, Directory of Official Information, Ministry of Justice, 2007)

¹¹ (Tourism Industry Aotearoa, TIA Industry Infographic, July 2018, <https://tia.org.nz/assets/Infograph/TIA-Industry-Graphic.pdf>)

¹² (Regional Tourism New Zealand, <https://rtnz.org.nz/>, July 2018)

Figure 5: New Zealand Ministry of Business, Innovation and Employment Organization Chart



*The above organizational chart has not been confirmed

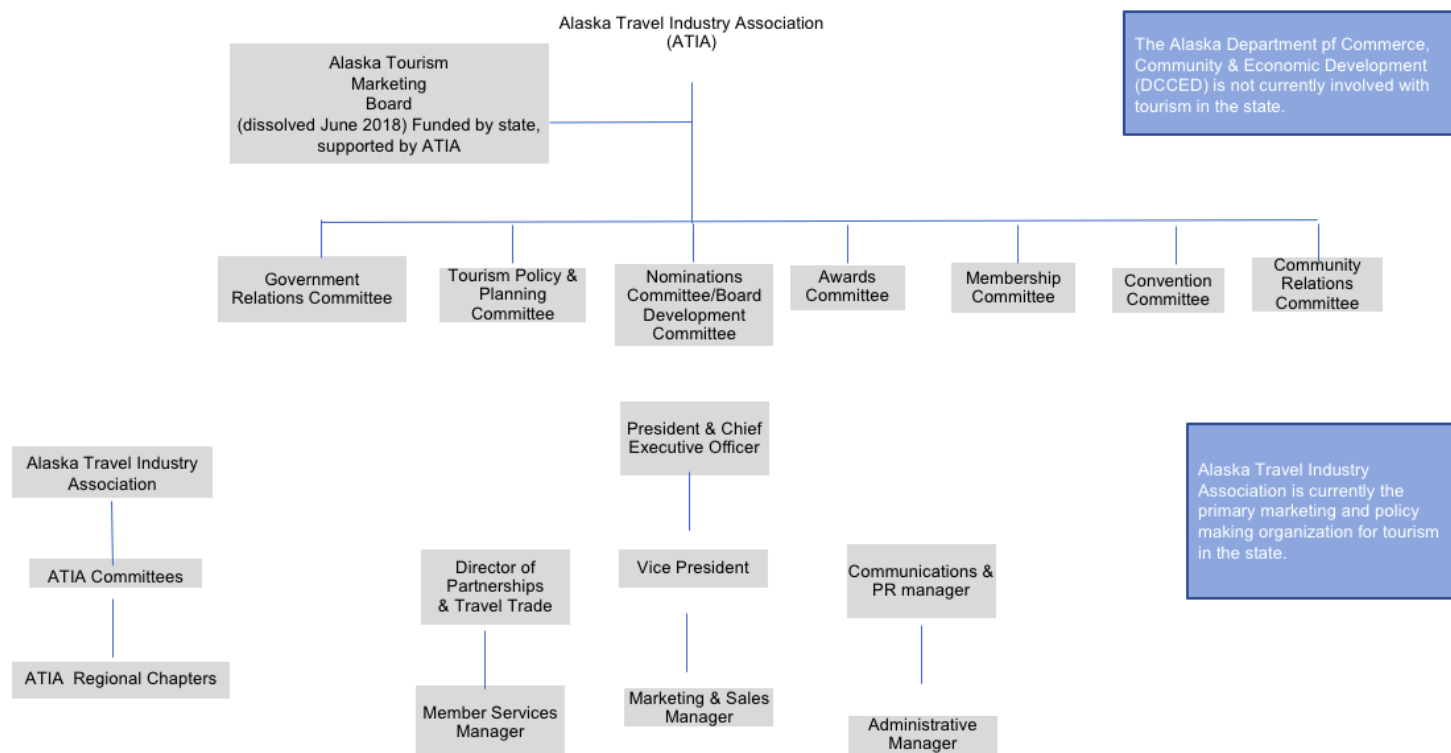
Alaska

Organization	Mandate	Type
Alaska Travel Industry Association (ATIA)	A not-for-profit, membership based organization currently responsible for statewide travel marketing. In addition to being responsible for driving traffic to TravelAlaska.com, the ATIA engages in advocacy, legislation, tourism policy in addition to managing a foundation that offers scholarships to industry members. The organizations mission is to <i>promote Alaska as a top visitor destination, communicating and promoting Alaska's tourism industry as one of the state's major economic forces. ATIA is the respected voice of the industry, promoting industry growth while caring for the environment, recognizing cultures, and supporting Alaska's unique quality of life.</i> ¹³	Non - Profit Industry Association
State of Alaska Department of Commerce, Community & Economic Development - Division of Economic Development	In 2017, all responsibility for marketing in Alaska moved from the Vivision of Economic Development to the Alaska Travel Industry Association. As such, the States involvement in tourism is understood to be at arms length.	Government (State)
Alaska Tourism Marketing Board (ATMB) (dissolved 2018)	A volunteer organization that sat between the ATIA and previously funded by the state. Recent budget cuts saw that the ATMB would no longer be funded past June 2018. ¹⁴ Its future is uncertain.	Government (State)
Convention & Visitors Bureaus/Boards	Visit Anchorage, Skagway Convention and Visitors Bureau, dedicated to marketing their city and surrounding area.	Industry Association
Special Interest Groups	Adventure Green Alaska, American Indian Alaska Native Tourism Association.	Volunteer Organizations, Not-for-Profits

¹³ (Alaska Travel Industry Association Annual Report 2016-2017 <http://www.alaskatia.org/about-us/annual-reports>)

¹⁴ (Audit recommends Alaska's state marketing board disband <https://infotel.ca/newsitem/ak-tourism-marketing-board/cp2021749025>)

Figure 6: ATIA Organizational Chart

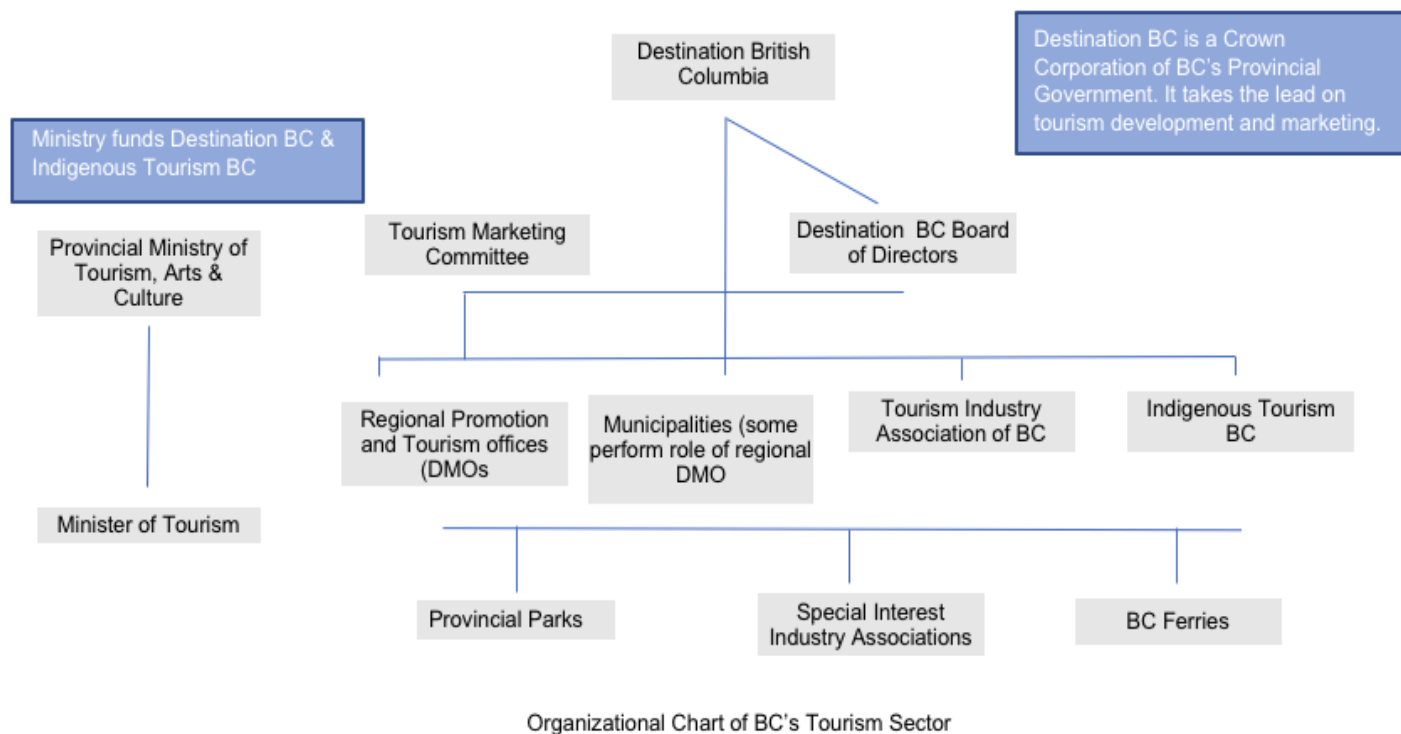


*The above overview of the tourism sector has not been confirmed

British Columbia

Organization	Mandate	Type
Destination BC	Lead role in tourism development, management and marketing programs in key domestic and international markets, working closely with private sector operators and industry groups and other government ministries to create an integrated approach in B.C.	DMO, Crown Corporation
Ministry of Tourism, Arts & Culture	Funding ministry for Destination BC	Government (Provincial)
Indigenous Tourism BC	Not for profit stakeholder based organization providing marketing, training, information and networking opportunities to province's Indigenous tourism businesses and communities.	DMO
Tourism Marketing Committee Members	Role of providing cross provincial marketing direction to DBC. The Tourism Marketing Committee includes representatives nominated by the Regional Destination Marketing Organizations (RDMOs) as well as two Destination BC Board members. It is chaired by Destination BC's CEO.	Public Private Committee
Regional Destination Marketing Organizations	The RDMOs are contracted by DBC to deliver a range of tourism programs in their region, including training, marketing and product development, which ultimately benefit communities and tourism businesses.	DMOs (Regional)
Municipalities	Many communities in BC market themselves as destinations. Their organization can be in form of formal organizations and registered societies, part of Chambers of Commerce or volunteer organizations. Many receive funding from Province. Some destinations are marketing a single community while others are marketing a group of communities based on geography, driving routes and other factors relevant to the consumer.	Community Partners
Special Interest Industry Associations	A number of associations, consortiums and product sector organizations represent the interests of B.C.'s tourism industry at the national and provincial levels. These groups address product development, coordination, cooperative marketing and advocacy to assist tourism industry operators with their day-to-day business activities.	Associations
Tourism Industry Association of BC	Role is advocacy, policy development, membership & strategic alliances, strategic communications and government relations, operational sustainability & excellence.	Industry Association

Figure 7: Organizational Chart of Destination British Columbia

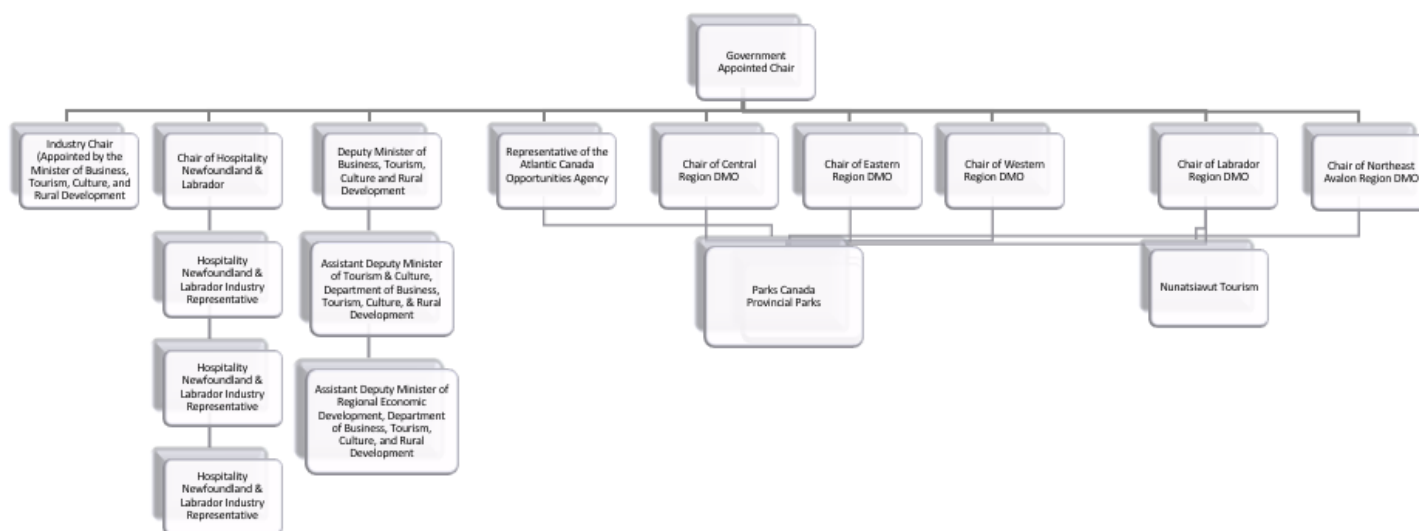


*The above organizational chart has been created by research and has not been confirmed by Destination BC.

Newfoundland & Labrador

Organization	Mandate	Type
Hospitality Newfoundland & Labrador (HNL)	Non-profit industry association advocates on behalf of members and the entire tourism industry by informing members of industry information and representing industry interests to all levels of government.	Industry Association
Department of Tourism, Culture, Industry & Innovation	Leads the economic, culture, and innovation agenda of the Provincial Government. Also operates public-funded tourism, culture and heritage facilities including Arts and Culture Centres, Provincial Historic Sites, and Visitor Information Centres	Government (Provincial)
Regional DMOs (Labrador, Western, Central, Eastern & St. John's/Northeast Avalon)	Regional industry representation. Are conduits to Newfoundland and Labrador Tourism Board. Organizations like Parks Canada and the Provincial Parks feed into relevant DMO for representation.	DMO (regional)
Newfoundland & Labrador Tourism Board	Private-public partnership with the mandate of guiding the strategic tourism plan's 7 visions. *Organizational Chart is below.	Public Private Partnership
Atlantic Canada Opportunities Agency (ACOA)	To create opportunities for economic growth in Atlantic Canada by helping businesses become more competitive, innovative and productive, by working with diverse communities to develop and diversify local economies, and by championing the strengths of Atlantic Canada. Provides advocacy, training and funding.	Government (Federal)
Indigenous Tourism Association for Atlantic Canada	This is in development and will be a joint funding partner of ITAC and the four Atlantic Canada tourism ministries.	Industry Association
Nunatsiavut Tourism Association	Advocates and markets on behalf of the Nunatsiavut tourism industry.	Industry Association

Figure 8: *Organizational Chart of the Newfoundland & Labrador Tourism Board



Yukon

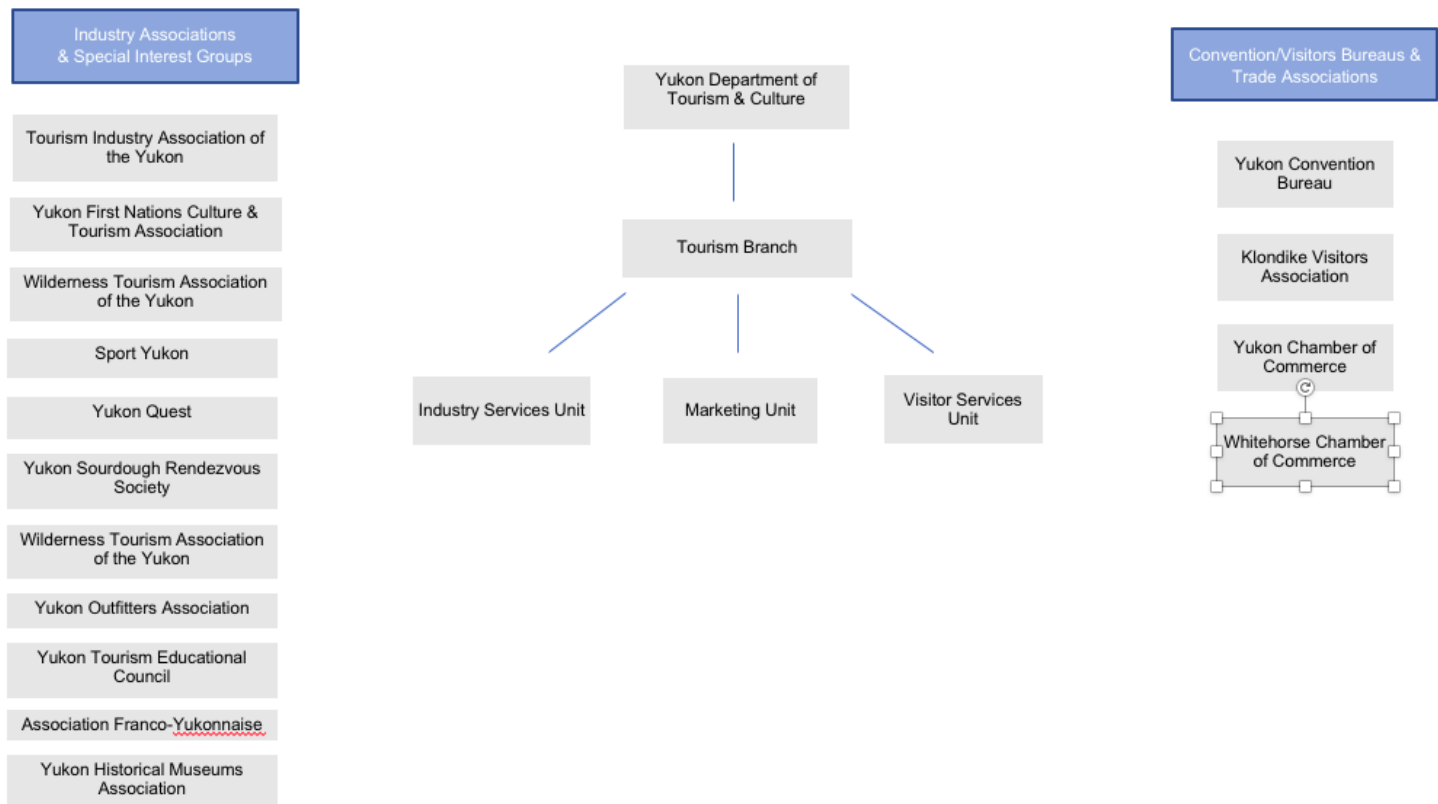
Organization	Mandate	Type
Yukon Department of Tourism and Culture	The Department of Tourism and Culture plays a central role in shaping and delivering a strong Yukon economy through tourism revenues and support for the arts, culture, heritage and tourism sectors.	Government
Tourism Branch - Industry Services	The Industry Services unit offers tourism Product Development advice and counselling, along with visitor Research data and information regarding Resource and Land Planning. Industry Services is also responsible for managing the Product Development Partnership Program and the Tourism Cooperative Marketing Fund. ¹⁵	Government
Tourism Branch - Marketing Unit	Actively promotes Yukon as a destination, builds and maintains marketing strategies. Intersect with tour operators, suppliers, travel agents, travel media.	Government
Tourism Branch - Visitor Services Unit	Responsible for the management of the six Yukon Visitor Information Centres (VICs) and Yukon governments media library The VICs provide high quality information that encourages visitors to stay longer, spend more, revisit a region, or experience more of what the territory has to offer.	Government
Senior Marketing Advisory Council	Comprised of 12 tourism industry members with substantial marketing experience and skills related to tourism. They make recommendations, on behalf of industry, to the Department of Tourism and Culture on tourism strategies and plans related to marketing, performance, product development, research and budgets. The SMAC reports to the Tourism Industry Association of the Yukon Board of directors. ¹⁶	Industry Association
Tourism Industry Association of Yukon	A membership-based organization, whose mandate is to provide leadership in the Yukon tourism industry, increase awareness of the value of tourism, and bring tourism industry together. ¹⁷ The Tourism Industry Association receives its core funding through the Department of Tourism and Culture.	Industry Association
Yukon First Nation Culture and Tourism Association	A non-profit organization whose mandate is to foster the development of, grow, and promote vibrant and sustainable Yukon First Nations arts, culture and tourism sectors. This is achieved through marketing and communications, product development, entrepreneurial development and advocating for the sectors.	Not-for-profit organization
Special Interest Industry Associations and non-profit industry associations	A number of associations, groups and organizations represent the interest of their specific sector of the tourism industry at the territorial level. These groups exist to support development, marketing and advocacy in the tourism industry.	Associations

¹⁵ (Yukon Tourism Website <http://www.tc.gov.yk.ca/tourism.html>)

¹⁶ (<http://tiayukon.com/committees/tourism-marketing-committee-tmc-ytmp/>)

¹⁷ (<http://tiayukon.com/about/>)

Figure 9: Organizational Chart of the Yukon Department of Tourism and Culture



Key Takeaways for Yukon

- Create a good understanding of how the various organizations in the territory work with tourism, in order to minimize the duplication of efforts.
- When setting up steering or oversight committees, include representatives from your counterpart organizations, as well as seek to have a seat on their committees.
- In the majority of jurisdictions scanned we see a division of tasks between two institutions when it comes to managing tourism. A government department (which may have other mandates, ranging from economic development to languages) is responsible for tourism policy, business planning services, research, training, etc. Whereas the marketing and stakeholder work falls to a destination marketing organization, or a tourism board, which usually has a private sector board. This division of tasks works well, because it allows the (typically more bureaucratic) government arm to focus on long term planning and strategy and allows the destination marketing organization to be nimble, and flexible to adjust to a rapidly changing market.

B. Overall Tourism Strategy Design & Organization

Seven of the eight jurisdictions reviewed currently have a tourism specific strategy in place, ranging from five to 10 years. The state of Alaska does not have a publicly available strategy that outlines the direction of the tourism industry as a whole. The range of available destination strategies reviewed have each identified between five to seven strategic directions, identified either as pillars, themes or focal points. These directions allow the destination to identify tactics for topics including but not limited to product development, air linkages, service quality standards, research and technology, human resources, infrastructure, marketing, and industry organization and oversight. Noteworthy is the trend towards an integrated strategy that includes elements of both sales and marketing, in addition to strong destination management.

Australia

Australia's current tourism plan, Tourism 2020, was established in 2010. Its goal is to drive \$115 billion in annual tourism spend by the year 2020¹⁸. With tourism spend sitting at \$41.2 billion in May 2018, this plan is on track to achieve their goals and garner \$131 billion by the end of this decade¹⁹. As part of Tourism 2020, supply-side targets for aviation capacity and accommodation investment were set to ensure the industry could deliver on the needs of target consumers. Implementation has been via a three-phased approach; focusing on the High Value Traveller²⁰ and MICE markets; increasing partnership marketing with travel trade and airline partners in the aforementioned niches; and working with aviation and accommodations to build capacity. While it's a year-round destination that does not see the compression issues of Yukon, Australia's approach to tourism development are notable. The Six Strategic Areas of action that support this plan are as follows:

1. *Grow demand from Asia*
2. *Build competitive digital capability*
3. *Encourage investment and implement the regulatory reform agenda*
4. *Ensure tourism transport environment supports growth*
5. *Increase supply of labour, skills and Indigenous participation*
6. *Build industry resilience, productivity and quality*²¹

Canada

Canada is currently experiencing a tourism boom, with an increase in yearly visitation numbers across the 10 international leisure markets Destination Canada (DC) invests in. Their current corporate strategy, Finding Our

¹⁸ (Tourism Australia & AusTrade, Tourism 2020, December 2011, Pg. 1) <http://www.tourism.australia.com/content/dam/assets/document/1/6/w/u/3/2002107.pdf>

¹⁹ (Tourism Australia, Corporate Plan 2018 to 2022, May 2018, Pg. 4) <http://www.tourism.australia.com/content/dam/assets/document/1/7/1/c/u/2007966.pdf>

²⁰ <http://www.tourism.australia.com/en/markets-and-research/consumer-research.html>

²¹ (Tourism 2020, Australian Government Department of Resources, Energy and Tourism, 2011)

North Star, centres around a multi-year (2018 - 2022) Team Canada collaboration with partners to improve marketing coordination and co-investments. The plan states *“Just as the North Star has historically been used as a critical navigation tool, North Star 22 will serve as a focal point for the industry to come together in a coordinated and unified fashion to invest and promote Canada in priority international markets like never before.”*²²

Finding Our North Star’s stated objectives are:

1. *Increase demand for Canada with innovative marketing*
2. *Advance the commercial competitiveness of the tourism sector*
3. *Increase corporate efficiency and effectiveness*

The overarching goal of DC is to attract 1.5 million additional travellers spending \$1.9 billion by 2022. DC’s main focus is international marketing, and secondary focus is supporting industry partners through industry knowledge, tools and insights. Their strategy and tactics are heavily dependent on strong market research and inclusive partnering with provincial and regional destination marketing organizations.

Destination Canada is a Crown Corporation funded by the Federal Ministry of Innovation, Science and Economic Development. In May 2017, the ministry announced a New Tourism Vision - a whole of Canada approach to seize the global market opportunity tourism presents, specifically investing in sustained marketing, addressing issues like visa processing, and supporting tourism industry upgrading offerings and creating new product. The New Tourism Vision’s three pillars are marketing, access and product.

Greenland

Greenland is currently implementing their second three year strategy, ‘Tourism Strategy 2016-2019.’ This, as well as their previous strategic plans are built on a sophisticated segmentation tool. The tool segments two groups: adventure tourists and cruise tourists, not only by demographics but by their motivations and desires. These important details provide valuable insight to industry seeking to develop products or marketing strategies to attract these tourists. The segmenting exercise is detailed further in the next section.

The objective of their strategy is two-fold: secure the on-going involvement of local people to ensure tourism benefits them and to improve the investment and partnerships of international stakeholders.

The ten year vision for tourism in Greenland is:

*By 2025 the tourism industry in Greenland is one of the leading industries in the country and Greenland is an internationally known and sought after adventure and cruise destination. The Greenland tourism industry is known for its innovative profile, unique Arctic experiences and a tourism development focused on sustainability, responsibility and a local foundation*²³.

²² (Destination Canada, Finding our North Star, 2018-2022)

²³ (Greenland Tourism, Tourism Strategy 2016-2019, 2016, Greenland)

A few key points from the Greenlandic tourism strategy are:

- Greenland is an adventure tourism destination (with the exception of the large cruise ships) product development and marketing are all geared towards this niche and its various sub-segments.
- Continue to focus on prioritized and targeted international marketing of Greenland
- Support knowledge and training of tourism industry in Greenland to ensure improved product experience delivery
- Adjust and improve our brand ‘Pioneering Nation’ to ensure it continues to spur demand in our target markets
- Lower seasonality

Iceland

When Iceland set out to build its Road Map for Tourism 2015 - 2020, tourism numbers had just begun to skyrocket, increasing from 565,611 annual arrivals in 2011 to 1,289,140 in 2015²⁴. For a country with a population of 334,000 people and a tourism sector traditionally regarded as a hobby industry with unskilled labour, this growth was enormous. Before this time, growth was an average increase of 10% a year. What set the record growth in motion cannot be replicated. It began with the country’s bankruptcy in 2008 followed by the eruption of Eyjafjallajökull volcano which shut down the county and much of Europe’s air traffic down for six days and left visitors skeptical of Iceland as a safe place to visit. In 2009, there was a 1.7% drop in annual visitation, and a further 0.2% drop in 2010.²⁵ Needing to kickstart growth again, the tourism industry and tourism promotion agency, Promote Iceland, created several clever social media marketing campaigns focused on showcasing the country’s many natural assets, which went viral. Icelandair created the “Stopover Buddy” campaign and showcased low cost flights to both Europe and Iceland. It worked. When numbers started to increase by 20-30% year over year for 3 consecutive years, the government and industry of Iceland determined their priorities needed to be in getting organized, increasing capacity and creating policies to manage the influx of visitors.

The 7 “Focal Points” of Iceland’s current tourism plan are:

1. *Coordinated management of tourism*
2. *Positive visitor experience*
3. *Reliable data*
4. *Nature conservation*
5. *Skills and quality*
6. *Increased profitability*
7. *Better distribution of tourists*²⁶

Now, three years into the plan, Iceland has continued to see overwhelming tourism growth (in 2017 2,224,074 visitors were recorded²⁷) and much of the emphasis has shifted to mitigating overtourism (see Section L of this report.)

²⁴ (Icelandic Tourism Board, Foreign Visitors to Iceland 1949-2017, 2017)

²⁵ (Icelandic Tourism Board, Foreign Visitors to Iceland 1949-2017, 2017)

²⁶ (Road Map for Tourism, Ministry of Tourism, Industry and Innovation & Icelandic Travel Industry Association, 2015)

²⁷ (Icelandic Tourism Board, Foreign Visitors to Iceland 1949-2017, 2017)

New Zealand

The creation of New Zealand's current plan, Tourism 2025, began in 2012 with the national tourism framework which came out of the 2012 Tourism Industry Aotearoa (TIA) 'Think Different' Summit, followed by three years of stakeholder engagement before the detailed framework 'Tourism 2025 - Growing Value Together/Whakatipu Uara Ngatahi' was released in March of 2014.

Through this, the biggest learning was that if they wanted to hit their high level aspirational goals of \$28 billion USD growth in tourism revenue by 2025, they would need to invest in skilled labour as a priority. By 2015, they were ready to create the five main themes to measure against:²⁸

1. Productivity for Product (Expanding the productive capacity of industry)
2. Grow Sustainable Air Connectivity
3. Drive Value Through Outstanding Visitor Experience
4. Target for Value: Shift our Focus from Volume to Value
5. Prioritize Insight to Drive and Track Progress²⁹

Alaska

Available research and documentation indicates that Alaska does not have a current strategy that addresses the state's tourism industry as a whole. Interviews with travel trade and Visit Anchorage indicate this to be true, however it is important to note that the research team was unable to secure any interviews with the Alaska Travel Industry Association (ATIA), the authority for the industry in lieu of a statewide government agency. As such, it is unclear if any future tourism strategy exercises are either scheduled or currently underway. Discussions with travel trade indicate that this is not the case.

The most recent and relevant documents that addresses any long term planning for tourism in Alaska include 'Sustaining Alaska's Tourism Industry,' which addresses the role of the ATIA as a whole, in addition to a set of Tourism Policies produced by the same organization.

Adopted by the ATIA in 2008, 'Sustaining Alaska's Tourism Industry' outlines the organizations mission and vision, while outlining eight priority areas, referred to as strategies. These strategies largely address ATIA's role in the industry, with some overlap into issues affecting the industry as a whole. The industry wide issues that the strategy seeks to address include the use of public lands, transportation, product development and visitor experience.

1. *Seek to be the Respected Voice of the Travel Industry in Alaska, Balancing Economic, Environmental and Long-Term Sustainability of the Alaskan Experience*
2. *Maintain a Leadership Role on Industry Development and the Planning of Public Land Projects*
3. *Shape Transportation Initiatives that Enhance and Support Tourism Opportunities and Improve Access for the Wide Spectrum of the Visitor Industry*
4. *Promote and Support the Development of Wildlife Viewing Opportunities*

²⁸ (Tourism Industry Aotearoa, Tourism 2025 - Timeline, 2016, <http://www.tourism2025.org.nz/making-it-happen/timeline/>, July 2018)

²⁹ (Tourism Industry Aotearoa, Tourism 2025: Two Years On, 2016, <http://www.tourism2025.org.nz/assets/Documents/TIA-T2025-Doc-NewLogo.pdf>, July 2018)

5. *Lead in Conflict Resolution*
6. *Promote Quality of All Aspects of the Visitor Experience*³⁰

The ATIA's Tourism Policy Statements outlined eight position statements addressing the following areas:

1. *Healthy and Sustainable Alaska Tourism Industry*
2. *Increased Funding for Alaska's Public Lands*
3. *Recognizing the Importance of Arts, Culture and Heritage*
4. *Winter Tourism Development*
5. *Science and Research Based Policy Making*
6. *Development on public lands minimizes competition with private sector*
7. *Streamlined Permitting*
8. *Arctic Tourism*³¹

British Columbia

Destination BC has both a Corporate Tourism Strategy (2017 - 2020) which directs the actions of the Crown Corporation, and a provincial Tourism Strategy, *Gaining the Edge* 2015 - 2018, which guides the direction of the tourism segment at large. Interviews confirm that Destination BC is currently undergoing consultations to create the updated three-year provincial tourism strategy. This process involves created 20 regional Destination Development Action Plans, through substantial stakeholder engagement, and rolling them into a wide-spread provincial plan. As they are in the thick of planning no decisions have been made yet for future pillars. In both current strategies, strong partnerships, marketing and experience design, including an emphasis on adventure travel and Indigenous experiences are noted strongly.

Unlike any other jurisdictions scanned, Destination BC's Corporate Strategy organizes its pillars into 5 questions:

1. *What is Our Winning Aspiration? Share the transformative power of BC experiences with the world. Grow sustainable social, cultural and economic benefits for all British Columbians.*
2. *Where Will We Focus? Path to Purchase; Geography; Visitor Travel Values; Key Partners*
3. *How Will We Win? Powerful Marketing, Experience Design, Engage People Power*
4. *What Capabilities Must We Have? Brand Leadership, Partner Engagement, Organizational Agility, Actionable Insights*
5. *What Systems Do We Need? People, Technology, Partner, Corporate*³²

Gaining The Edge, The Provincial Tourism Strategy, is organized into 4 Goals:

- Goal 1: Leadership Through Partnership Alignment and Coordination*
Goal 2: Focused Marketing

³⁰ (Sustaining Alaska's Future <http://www.alaskatia.org/our-voice/public-policy>)

³¹ ATIA Tourism Policy Statements Arctic Tourism <https://www.dropbox.com/s/517k9ay784t4kta/ATIA%2BTourism%2BPolicy%2BStatements.pdf?dl=0>

³² (Corporate Strategy, Page 10, https://www.dropbox.com/home/YUKON%20JURISDICTIONAL%20SCAN/BC?preview=DBC-Corporate-Strategy-2017_Nov-2017.pdf)

Goal 3: World-Class Experiences

Goal 4: Enhancing Competitiveness and Sustainability ³³

Newfoundland & Labrador

Newfoundland and Labrador is similar to Iceland in that exemplary marketing and storytelling has set the wheels in motion for a remarkable tourism industry. Partly as a result of this, Newfoundland and Labrador is enjoying comfortable and steady growth rate of 4-5% a year.³⁴ The main challenge the province has seen as a result from their strong marketing efforts, has been a surge in tourism demand, with insufficient supply, primarily during peak season. Therefore, much of focus in the last three years is on product development (refer to Section H.)

Newfoundland and Labrador's tourism strategy, Uncommon Potential, was launched in 2009 but updated in 2015 to guide the industry from 2016 - 2020. It's 7 Strategic Directions are as follows:

1. *Private Public Leadership*
2. *Sustainable Transport Network*
3. *Marketing Intelligence & Research Strategy*
4. *Experience Development*
5. *Tourism Technology*
6. *Marketing Our Brand*
7. *Developing Our Workforce*³⁵

³³ (Gaining the Edge, Page 3, https://www.dropbox.com/home/YUKON%20JURISDICTIONAL%20SCAN/BC?preview=gainingtheedge_2015-2018.pdf)

³⁴ (Newfoundland & Labrador Department of Tourism, Culture, Industry & Innovation, Tourism Statistics, 2018, https://www.tcii.gov.nl.ca/tourism/tourism_research/stats/index.html)

³⁵ (Uncommon Potential, Newfoundland & Labrador Tourism, 2015, Pg. 19)

Summary of Tourism Strategies

Strategic directions	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
Visitor Experience	Positive visitor experience	Improving access	Support knowledge and training of industry to improve experience delivery	Positive visitor experience	Drive value through outstanding visitor experience	Improve overall quality of the visitor experience	World class experiences; new focus on adventure and cultural experiences	Positive visitor experience
Destination Management	Coordinated management of tourism	In development (to follow unified approach)	Left to municipalities, with whom Visit Greenland cooperates. They support creation of new products that match the motivations of their target segments.	Coordinated management of tourism		Integrate tourism into the planning of public land projects, improve transportation and access	Regional DDAPs form basis of provincial strategy; leadership through partnership alignment and coordination	Private public leadership
Labour	Increase supply of labour, skills and Indigenous participation	Not highlighted	Not within purview of Visit Greenland - although creating local (year-round) jobs is one of their objectives	Enhance skills and quality	Main outcome of stakeholder engagement for current goal was need to invest in skilled labour	Indirectly addressed by way of recommending training and recognition of high quality visitor experiences	Strong Ministry support for WorldHost training program	Developing workforce through skills training
Performance Measurement	International arrivals international visitor spend	International arrivals (Statistics Canada) international visitor spending (Statistics Canada)	Major ongoing initiative to measure tourists and segment inbound tourists.	Season and region distribution; visitor experience	Prioritize insight to drive and track progress	Not addressed	Actionable insights; sharing data with industry and partners	Marketing intelligence and research strategy
Marketing	Grow demand from Asia	Increase demand with innovative marketing	Prioritized and targeted international marketing	Entice high-value visitor; regional and seasonal distribution	Shift focus from volume to value	Not highlighted	Focused marketing	Marketing the Brand
Product Development	Build industry resilience, productivity and quality	Noted at Ministry level, actioned through regional development funds	Very specifically adventure and cruise focused	Not highlighted	Expanding productive capacity of industry	Support the development of wildlife viewing and winter tourism product	World-class experiences	Supporting and advocating for people programming
Infrastructure	Ensure transport environment supports growth	Upgrading offerings; supporting access	Not highlighted	Referenced as need/next focus area in interviews	Build air connectivity	Improving access	Not highlighted	Sustainable transport network

Key Takeaways for Yukon

- On Drafting the Strategy:
 - Allow for ample time (at least 3 months) for stakeholder engagement prior to plan building
 - Create a simple plan, that is easy to read, easy to action and easy to measure (too many destinations create long tomes that sit unread on shelves). Create a well-designed document that all your stakeholders will want to read.
 - Lead with a clear mission and vision for the long-term (10 or 20 year) sector growth
 - Create a 2-3 year action plan - conditions change too rapidly for anything longer to be reliably implementable
 - Build and commit to an efficient interim strategy review process to ensure it remains relevant
- Key Tactics to Consider:
 - Growing air connectivity
 - Targeting higher value travellers, as opposed to setting high and unqualified arrival targets
 - Resist creating 'easier access' or 'driving the price down' to create volume
 - Ensure marketing is backed by strong product development plan that ensures the quality of experience, and Yukon's core selling propositions are protected and supported
 - Base marketing on solid target market segmentation
 - Anticipate the need and appreciate how to distribute guests across the destination
 - Create strong and varied trade partnership initiatives
 - Clearly outline roles and responsibilities of various stakeholders

C. Noteworthy Tourism Initiatives

This section provides an overview of notable, tourism specific initiatives in each region. No two destinations are the same, and any tourism strategy or focus must thoroughly consider overall global market trends in combination with the unique set of circumstances presented by each destination. Where strategic pillars or themes will provide the backbone for a destination strategy, an overall focus or priority (i.e., research, capacity, addressing over tourism) often is clear prior to the development of a strategy, or becomes clear throughout the process.

Australia

Tourism Research: In November 2012, Tourism Australia released the first tranche of a major international tourism research project into how global consumers view Australia, and what most motivates them to visit. Over the last five years, Tourism Australia has spoken to over 90,000 international long-haul travellers via online consumer research panels. In 2016, they integrated the following markets into the program: Brazil, Canada, France, Hong Kong, Italy and Taiwan. Insights from the Consumer Demand Project have been used extensively to inform and support development of Tourism Australia's strategic direction, campaign development, as well as to inform the tourism industry of potential opportunities to build the value of Australian tourism.³⁶

³⁶ (Consumer Demand Project, Tourism Australia, 2017) <http://www.tourism.australia.com/en/markets-and-research/consumer-research.html>

Beyond Tourism 2020 Steering Committee³⁷: an initiative of the Australian Government to support the development of a new long-term vision for tourism, encouraging innovation, new technology and reducing red tape. The Committee represents a selection of Australian tourism industry leaders who have been tasked with developing a long-term tourism strategy that will drive and facilitate growth.

Branding and Marketing Platforms: Creating platforms with collections of products that currently exist, is another inventive way the country is showcasing the best they have to offer examples include Great Walks of Australia promoting hiking/trekking activities, Unique Wineries promoting wine touring routes, as well as Luxury Lodges of Australia. The Aboriginal Tourism Action Plan showcases Australia's commitment to incorporating and celebrating Aboriginal experiences as part of the tourism product.

Canada

Canada's New Tourism Vision: The federal Ministry of Innovation, Science and Economic Development new tourism focus takes action under three pillars:

- **Marketing** - millennial travel, increased funding for Destination Canada
- **Access** - lifting visas, lessening red tape
- **Product** - supporting Indigenous, China-specific, LGBTQ, and Culinary product development ³⁸

Canada-China Year of Tourism: This ties into the federal government, and DC supported, goal to double the number of Chinese tourists coming to Canada by 2021. Includes tourism trade missions, new visa application centres in China, and nation to nation advocacy.³⁹

Signature Experiences: Highlighting those experiences in Canada that stand out as exceptional and uniquely Canadian. Signature experiences are marketed by DC internationally.⁴⁰

Explorer Quotient: The Explorer Quotient is a highly detailed segmentation tool providing tourism stakeholders with insight into why and how people travel.

Greenland

Market Segmentation: Market segmentation is the foundation of all of Visit Greenland's work and drives how all marketing and market development is implemented. All data is inputted into a sophisticated online tool, which can be accessed for free and is particularly useful to international and national operators, who use it to understand how to design product and marketing messages. The segmentation maps engagement and niche interests, as shown in the

³⁷ (Ministry for Trade, Tourism and Investment, Growing Australia Tourism, 2018, http://trademinister.gov.au/releases/Pages/2018/sc_mr_180209.aspx?w=tb1CaGpkPX%2FIS0K%2Bg9ZKEg%3D%3D)

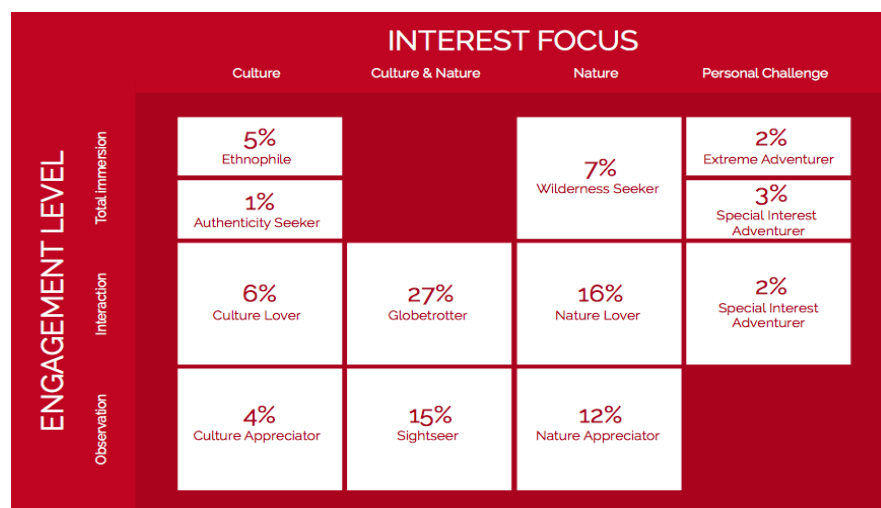
³⁸ (Government of Canada, New Tourism Vision, www.ic.gc.ca/eic/site/095.nsf/eng/00002.html)

³⁹ (Government of Canada, Canada-China Year of Tourism, <https://www.ic.gc.ca/eic/site/100.nsf/eng/home>)

⁴⁰ (Destination Canada, Signature Experiences, <https://www.destinationcanada.com/en/programs#signatureexperiences>)

diagram below.

Figure 10: Mapping of Greenland's Tourist Segmentation



Branding: Based on the understanding of the target markets, Greenland developed a unique and authentic tourism brand that honestly reflects the experience of Greenland today and showcases the values that Greenlanders hold dear. Their tagline is ‘Pioneering Nation’ and the brand is brought to life with vivid, professional photos (despite being a very small team, Visit Greenland has an in-house photographer) and videos.

Cruise Focus: Cruise tourism is an important segment for Greenland (and it is one of the fastest growing tourism segments). In an effort to increase the competitiveness of Greenland as a tourism destination, Visit Greenland undertakes several initiatives related to cruise tourism. The first was a shift from a tax per passenger, to a tonnage per port of call tax, which made provided a small financial benefit to cruise operators. The second is to provide updated information especially for cruise operators on the website: <https://cruise.visitgreenland.com/>

Iceland

Iceland’s biggest challenge is managing the numbers of tourist arrivals, as a result most tourism initiatives are designed to address this concern. These initiatives have been outlined in Section G.

New Zealand

Country-Wide Framework: New Zealand is an exemplary model of creating a destination-wide tourism initiative and executing on the plan to realise successful results. Ten years prior to launching Tourism 2025, New Zealand tourism was strong, growing at 6% a year and serving as the country’s number one export earner. However, the global financial crisis combined with the Christchurch earthquakes caused a sharp decrease in tourism arrivals.⁴¹

⁴¹ (Tourism Industry Association of New Zealand, Tourism 2025: Growing Value Together, March 2014, <http://www.tourism2025.org.nz/assets/Documents/TIA-T2025-Summ-Doc-WEB.pdf>, July 2018)

Tourism 2025 was established as a strategic framework to bring the industry back to strength and develop it further. It was not a detailed plan, but rather served as a shared vision and a common framework, with its authors identifying that in an industry as diverse as tourism, alignment would be central to their success. The initiative focused on identifying New Zealand's strengths - such as the 'brand power' of the destination - and where improvements were needed, such as training to industry workers. The initiative also worked to leverage the value of public-private partnerships, such as the New Zealand tourism industry's collaborative campaigns with Air New Zealand.

Internal Surveys: To ensure the initiative continues to work towards achieving its goals and successfully executing on its purpose, the market research group, Kantar TNS, on behalf of Tourism New Zealand and TIA, surveys a nationally representative sample of 500 adult New Zealanders in order to understand their perceptions of the value of international tourism, its benefits and challenges.⁴² This survey is conducted bi-annually, since December 2015

Alaska

Tourism Works for Alaska: The timing of Alaska's most notable tourism initiative, Tourism Works for Alaska, aligns with public discourse regarding the state's marketing budget, as it relates to tourism⁴³. The program launched in 2015, amid budget talks. Alaska's tourism marketing budget was at a high in 2012 with USD \$14.2 million, by 2017 that budget had been reduced 79% to USD \$3.2 million.

Spearheaded by the Alaska Travel Industry Association (ATIA), an examination of the programs assets indicate that its primary goal was and continues to be to illustrate the economic benefit of tourism to Alaskan businesses and citizens. The campaign is comprised of a website, a tourism awareness toolkit consisting of Java Jackets for to-go coffee cups, Pillow Cards placed on pillows at hotels, Take Out Stickers on to-go containers at restaurants, Cocktail Napkins in bars and a Direct Mail piece to the Alaska Legislatures⁴⁴. A further goal of the program is to educate and campaign members of government that with a decrease in marketing budgets, Alaska risks losing considerable market share⁴⁵.

Alaska Cooperative Marketing: With the express goal of promoting Alaska as a premier travel destination, the ATIA administers a capital grant available to both members as well as non-members of the ATIA. The organization has a sales team dedicated to encouraging local businesses to participate in a number of initiatives, including:

1. Mail out vacation planner
2. Travelalaska.com listings and ads
3. Newsletters
4. Social media campaigns
5. Participation in PR and travel trade roadshows

⁴² (Tourism Industry Aotearoa/Kantar TNS, Mood of the Nation, June 22, 2017, <https://www.tourismnewzealand.com/media/2916/mood-of-the-nation.pdf>, July 2018)

⁴³ States marketing Budget Could Be Cut by Two-thirds, KTVA News, (<http://www.ktva.com/story/36042780/states-tourism-budget-could-be-cut-by-two-thirds>)

⁴⁴ (Tourism Works for Alaska <http://www.tourismworksforak.org/tourism-awareness-toolkit.html>)

⁴⁵ (Tourism Works for Alaska <http://www.tourismworksforak.org/industry-data.html>)

Adventure Green Alaska: Established in 2009, Adventure Green Alaska (AGA) is a voluntary certification program that encourages Alaskan travel businesses to assess and improve their environmental performance. The AGA is a member of the Global Sustainable Tourism Council, which indicates that it has been evaluated itself for rigour. Applications to the program are administered and reviewed by the Adventure Travel Industry Association with support from a voluntary AGA advisory board. The organization states the following benefits of participation:

1. *Use of AGA logo*
2. *Marketing to consumers interested in traveling to Alaska*
3. *Inclusion in AGA promotional materials and events*
4. *Recognition on the Adventure Green Alaska website*
5. *Media exposure on AGA social media and through AGA press releases*
6. *Involvement in Alaska's first certification program for the tourism industry*
7. *Enhanced conservation ethic in Alaska's tourism industry*
8. *Increased growth and quality of eco-friendly tourism in Alaska and worldwide*
9. *Support for local businesses and communities*
10. *Support for the natural environment, history and culture of people living in Alaska*⁴⁶

British Columbia

Co-Op Marketing Program: At Destination BC collaborative marketing is heavily emphasized. The program provides co-op funds to regional DMOs, community consortiums, sector organizations and communities in BC. The purpose is greater alignment of common interest groups to achieve a bigger impact and enhanced ROI through marketing collaboration. In 2017/18 more than 140 communities were participating in more than 50 co-op marketing projects.⁴⁷

Remarkable Experiences Program - The program includes hands-on workshops and access to traveller research and industry members experiencing similar challenges. Workshops focus on experience design, and digital and social media marketing.

SuperHost: The well known training program is recognized as the standard across BC, and therefore promoted widely by Destination BC to industry members.

#ExploreBC: A social media marketing campaign to encourage locals to travel throughout BC, to extend the shoulder season and explore rural and small town BC.

Enhance Crown Land Policies: supporting needs of nature-based tourism businesses, the province increased the max length of terms for adventure tourism leases (commonly referred to as 'concessions') from 45 years to 60

⁴⁶ (Adventure Green Alaska <http://www.adventuregreenalaska.org/marketing-benefits>)

⁴⁷ (Corporate Strategy, Destination BC, https://www.dropbox.com/home/YUKON%20JURISDICTIONAL%20SCAN/BC?preview=DBC-Corporate-Strategy-2017_Nov-2017.pdf)

years. The government is currently examining new forms of tenure to allow exclusive use by adventure tourism businesses.⁴⁸

Newfoundland & Labrador

Product Development Plan: Newfoundland and Labrador's Tourism industry felt a gap in product after successful marketing campaigns. To alleviate this gap, the province's Product Development Plan, titled "The Way Forward," sets a course to "*increase the number of high quality, Newfoundland and Labrador 'brand' tourism experiences to attract more visitors, encourage them to stay longer and experience more.*"⁴⁹

Quality Improvement and Distribution: Multiple initiatives exist within the Province to improve quality of service, market readiness and extend the season, many of which could be adopted by Yukon, including the Tourism Assurance Plan⁵⁰ which sets minimum standards for tour operators in order to take part in the province's marketing/membership activities, the Market Readiness Subsidy Program⁵¹, and the Season Extension Program.⁵²

⁴⁸ (Gaining the Edge, Destination BC, https://www.dropbox.com/home/YUKON%20JURISDICTIONAL%20SCAN/BC?preview=gainingtheedge_2015-2018.pdf)

⁴⁹ (The Way Forward, Newfoundland & Labrador Department of Tourism, Culture, Industry & Innovation, 2017, Pg. 4.)

⁵⁰ (Hospitality Newfoundland & Labrador, Tourism Assurance Plan, 2018, <https://hnl.ca/resources/category/tourism-assurance-plan>)

⁵¹ (Newfoundland & Labrador Department of Tourism, Culture, Industry & Innovation, Market Readiness Subsidy Program, 2018, https://www.tcii.gov.nl.ca/tourism/tourism_development/market_subsidy.html)

⁵² (Newfoundland & Labrador Department of Tourism, Culture, Industry & Innovation, Market Readiness Subsidy Program, 2018, https://www.tcii.gov.nl.ca/tourism/tourism_development/season_extension.html)

Summary of Noteworthy Initiatives

Focus Areas	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
Mitigating Overtourism				X				
Marketing	X	X	X	X		X	X	X
Product Development	X	X			X		X	X
Research	X	X		X	X		X	
Stakeholder Engagement	X				X		X	X
Indigenous Tourism Development		X			X		X	
Impact Analysis			X		X			
Supporting The Business Case for Tourism	X					X		

Key Takeaways for Yukon

- Survey your residents and population in order to understand their perceptions of the value of international and domestic tourism, its benefits and challenges.
- Use your small population to your advantage to ensure stakeholders, public and private, are regularly consulted and help guide decisions.
- Understand that for strong success in tourism, an engaged population base is key.
- Create a committee with a cross-section of experts and decision makers, who are also stakeholders, to assist in implementation and measurement of your plan(s).
- Showcase product by finding ways that they are related / tie in to each other with common elements and common target market, and create branded collections to promote them to those markets.
- Create a deep, systematic understanding of your markets to guide product development and marketing exercises.
- If a particular segment is important, create specific projects targeted to increase its competitiveness.
- If the tourism industry is disparate, create strong co-marketing programs.
- New is not always better. Consider advocating for programs such as SuperHost to increase quality service

D. Elevation of Priority of Tourism

Each set of factors that lead to the prioritization of tourism within the destinations reviewed are unique. They're a combination of specific economic conditions at the destination, trends in global tourism, cultural events and current government focus.

Australia

Tourism became a priority for Australia in preparation for the 2000 Olympics, and it has only risen in importance since then. In government, at the national level, the Trade Minister is also the Tourism Minister. At the state level, many states now have a Tourism Minister that sits around the cabinet table, whereby 20 years ago, Tourism Minister was a junior position. In 2013, tourism was identified by Deloitte as one of the 5 Supergrowth Sectors to add \$250 billion to Australia's economy over the next two decades.⁵³

Canada

One in 11 Canadian jobs - more than 1.7 million jobs - depends on tourism.⁵⁴ This value is widely recognized by the Federal government, creating a mostly positive relationship between tourism interests and government across Canada. On the Federal level, tourism sits under the Ministry of Innovation, Science and Economic Development. In 2017, the then Minister of Tourism (a recent cabinet shuffle has tourism handled by the Minister of Tourism, Official Languages and La Francophonie) set forth a New Tourism Vision for Canada, which set these targets for growth:

- Canada will compete to be one of the Top Ten most visited countries in the world by 2025.
- The number of international overnight visits to Canada will increase by 30 per cent by 2021.
- The number of tourists from China will double by 2021.

Canada's New Tourism Vision articulates key policy shifts to remove travel barriers, encourages new product development and establishes sustained investments in tourism marketing in support of growth.

Greenland

In Greenland, a good relationship to the Home Rule Government is important. Relationship management ensuring good communication and that the politicians understand what Visit Greenland is doing and why they are doing it, is a big part of the institution's reporting work. Practically, they deliver monthly, quarterly and annual reports to the Government to report on their activities and impact. They deliver six newsletters to their stakeholders each year, that detail their work and impact.

⁵³ (Financial Review, "Deloitte names the 5 supergrowth sectors set to add \$250bn to Australia's economy, October 8, 2013. <https://www.afr.com/leadership/deloitte-names-the-five-supergrowth-sectors-set-to-add-250bn-to-australias-economy-20131007-jz1ud>)

⁵⁴ (Canada's Tourism Vision, Ministry of Innovation, Science and Economic Development, <https://www.ic.gc.ca/eic/site/095.nsf/eng/00002.html>)

Iceland

Before the boom, Iceland's tourism economy was widely considered a hobby industry, with unskilled labour and little resources dedicated.⁵⁵ Now it's elevated in priority, and investments are being made in skilled labour and infrastructure.

New Zealand

New Zealand's national tourism framework originates out of the 2012 TIA 'Think Different' Summit⁵⁶ coming in the wake of the global financial crisis and the Christchurch earthquakes of 2011 that set the industry back from a previous trend of consistent year-over-year growth. However, as noted at the time by Martin Snedden, former CEO, Tourism Industry Association New Zealand in *Tourism 2025: Growing Value Together*, they saw opportunity as exponential growth in global tourism was being driven in particular by the emerging middle class of Asia, putting structural forces in place that would favour tourism in New Zealand as the centre of the global economy moved closer, potentially creating an increase in demand for emerging markets to travel to New Zealand.⁵⁷

Alaska

The situation has reversed in Alaska, where a focus on tourism investment and marketing spend has greatly decreased since 2016. Alaska's marketing funding decreased 79% from 2012 to USD \$3.3 million in 2017.⁵⁸ An oil dependent state, when oil prices began to drop in the first quarter of 2015, the states deficit increased and unemployment began to rise quickly.⁵⁹ These factors, combined with a complete lack of a statewide sales taxes, individual income taxes as well as Alaska's Permanent Dividend Fund (derived from oil revenue), placed Alaska in a recession. However impactful the visitor economy has historically been to Alaska, the states financial situation has ensured that tourism importance has not been elevated at the government level.

British Columbia

Tourism in BC accounted for \$13 billion USD in 2016, an increase of 7.9% from the previous year, and 39.3% from 2006. This slow and steady increase in both revenue and jobs allows for widespread support in tourism investment, with the province of BC investing more than \$51 million into Destination BC a year since 2015.⁶⁰ The

⁵⁵ (Interview, Elfn Sigurveig Sigurðardóttir, Iceland Tour Operator)

⁵⁶ (Tourism Industry Aotearoa, Tourism 2025 - Timeline, 2016, <http://www.tourism2025.org.nz/making-it-happen/timeline/>, July 2018)

⁵⁷ (Tourism Industry Association of New Zealand, Tourism 2025: Growing Value Together, March 2014, <http://www.tourism2025.org.nz/assets/Documents/TIA-T2025-Summ-Doc-WEB.pdf>, July 2018)

⁵⁸ Analysis of Tourism Marketing Program Funding: Alaska October 2017 <http://www.alaskatla.org/Research/TE%20Key%20Findings.pdf>)

⁵⁹ (Alaska's Economy is Still Struggling, But the worst may have passed <https://www.adn.com/business-economy/2017/12/09/alaskas-economy-is-still-struggling-but-the-worst-may-have-passed/> accessed August, 2018)

⁶⁰ (Gaining the Edge, 2015-2018, Destination BC)

provincial government also continues to invest in tourism related initiatives including \$2.2 million USD per year beginning in 2015/16 to upgrade rest stops and visitor services.⁶¹

Newfoundland & Labrador

Newfoundland and Labrador's engaging tourism commercials kick-started tourism growth by 22 percent through the campaign's launch in 2006 to the end of 2010.⁶² They created demand and instilled a strong sense of pride in residents-at-large to welcome visitors to their province, and encouraged Newfoundlanders living away, to come home. The engaged resident base, coupled with revenue generation elevated the importance of tourism and its needs are acted on in departments outside tourism, such as the Department of Transportation.⁶³

Key Takeaways for Yukon:

- Strong destination marketing campaigns can instill pride in resident base, and advance priority in tourism.
- Communicating benefits and getting resident buy-in to the idea of tourism is essential to tourism priority.
- National or regional events can elevate tourism priority.
- Structured reporting is a useful tool to communicate progress and impact of the DMO.
- A whole of government approach and organizational alignment propels tourism priority.
- Consider policies and regulations and how they might impact the tourism industry carefully.

E. Product Development

Although most jurisdictions scanned have a product development angle as a strategic direction, few noteworthy tourism initiatives addressed product development, compared to marketing, stakeholder coordination and curbing overtourism. Interviewees noted marketing the destination generally takes priority over product development as it generates quick, measurable results. Interviewees also noted that product development is needed for long term gain and sustainability of the industry, and support of it needs to be prioritized (even though in most cases, it is not.) Newfoundland and Labrador Tourism was alone in taking pains to develop new tourism product because of lack of capacity and experiences to deliver on the market demand. They are now supporting product mainly through workshops and training encouraging the public to develop tourism experiences centred around people and culture, calling it "people programming." Stand-out product development initiatives for Australia center around Indigenous Tourism Experiences, with initiatives such as the Discover Aboriginal Experiences program in Australia.

Australia

Australia has launched Discover Aboriginal Experiences, taking the eight regions where they've identified market-ready Aboriginal experiences and establishing itineraries to leverage them.⁶⁴ To capitalize on the natural beauty of

⁶¹ (Gaining the Edge, 2015-2018, Destination BC)

⁶² (Selling Newfoundland: The Province Fights Copycat Ads, The Globe and Mail, 2018. <https://www.theglobeandmail.com/report-on-business/industry-news/marketing/selling-newfoundland-province-fights-copy-cat-tourism-ads/article7563830/>)

⁶³ (Interview with Andrea Peddle, Director, Newfoundland & Labrador Tourism)

⁶⁴ (Discover Aboriginal Experiences, Tourism Australia, 2018)

the country and target specifically the high-value market they cite in their Tourism 2020 plan, Tourism Australia created the *Great Walks of Australia*, high-end, multi-day walking itineraries. Furthermore, a *Restaurant Australia* marketing campaign helped develop a strong gastronomy reputation and offering.

Canada

Product development in Canada is supported mainly under the Ministry responsible for tourism, through economic development agencies such as the Atlantic Canada Opportunities Agency (referred in interviews as “the poster child for economic development agencies in Canada.”) The Ministry’s New Tourism Vision includes product as a priority, supporting Indigenous, China-specific, LGBTQ, and Culinary product development (referred to in Section D.) but specific initiatives were not found in the research. Interviews also noted the role of product development is considered a regional concern. While product development is not a mandate of Destination Canada, the DMO’s Signature Experiences program is used to support international travel trade product development/packaging, as well as for marketing purposes.

Greenland

The tourism board in Greenland shares its knowledge about priority segments with operators, who use that information to develop products and experiences that are in line with the segments’ motivations. Product development itself, is not under the purview of Visit Greenland, but rather the tourism officers at each municipality.

Iceland

Iceland’s goal to push more tourists to the winter season was achieved less by developing new product and more by targeted marketing. Now winter visitor numbers are nearly as high as summer.⁶⁵ They rely primarily on nature experiences, like Northern Lights viewing in winter, as core product.

New Zealand

NZ Māori Tourism supports Māori tourism product development through delivery of its Road Map, helping to point industry in the right direction to find the resources available. From mentoring services to market research, the organization offers resources for developing a tourism business including development and training, connecting to business networks, marketing and promotions, and securing funding.

NZ Māori Tourism also provides an online marketing toolkit and research in the form of tourism data sets, reports and market insights to help inform product development decisions.⁶⁶

⁶⁵ (Visitors to Iceland through Keflavik Airport, 2003-2018, Icelandic Tourism Board, 2018)

⁶⁶ (NZ Māori Tourism, <https://maoritourism.co.nz/>, July 2018)

Alaska

Of the combination of policy statements and long range planning statements produced by the Alaska Travel Industry Association (ATIA), winter tourism development, arctic tourism and wildlife viewing options are each mentioned, the former are identified as priorities twice while wildlife viewing options features once. Statements addressing both winter and arctic tourism loosely identify that the development of both areas will require support of partners and enhanced marketing. The promotion and support of greater wildlife viewing opportunities suggests that the path to success includes cooperation with agencies involved with public land planning and resource management, a theme that features frequently in discussions on Alaska's tourism resources and infrastructure. Product development of 'opportunities' offer greater opportunity for tactics than development of entire seasons, as such the following are tactics that the ATIA propose will support wildlife viewing opportunities:

- *Participate in public lands planning discussions*
- *Advocate for non consumptive wildlife use*
- *Work to develop standardized wildlife viewing guidelines that can be adapted to all levels of the tourism industry in Alaska*⁶⁷

British Columbia

Destination BC's Corporate Strategy 2017 - 2020 answers one of its main strategic questions "How Will We Win?" by the action to "Foster Remarkable Experiences" which includes these tactics:

- *Mobilize: bring together and align industry's collective efforts*
- *Empower: enable BC's tourism network with new capabilities*
- *Transform: enhance experiences and destinations to increase competitiveness*⁶⁸

Indigenous Tourism BC focuses on product development in its strategic plan "Pulling Together" by clustering existing market-ready and export-ready Indigenous businesses among Indigenous communities to develop tourism destinations.⁶⁹

Newfoundland and Labrador

When the now famous TV commercials sparked widespread interest in Newfoundland and Labrador, they generated an increase in demand with little product in place to satisfy it. To counter this the province performed a series of Tourism Destination Visitor Appeal Assessments for each of the 5 regions, to form the research base for a plan for product development. From this the department of Newfoundland and Labrador Tourism built a Product Development Plan, "The Way Forward, 2017 – 2020." which centers on four collective areas of focus:

⁶⁷ Sustaining Alaska's Tourism Future <http://www.alaskatia.org/our-voice/public-policy>

⁶⁸ (Corporate Strategy, Destination BC, 2017-2020)

⁶⁹ (ATBC Corporate Plan)

1. *Creating and Delivering Brand Experiences: People and Program-Based*
2. *Enhancing Tourism Market-Readiness*
3. *Collaborating to Compete*
4. *Understanding Value and Success*⁷⁰

Newfoundland and Labrador Tourism is leading the charge in an industry and organization wide approach to developing product. Their main actions focus on experience development support, education and mentoring; tourism market-readiness, best practices and innovation; season extension and visitor journey lens to tourism priorities; focused investment and policy effort in priority areas; experience networks, partnerships and collaborations; and anchor attraction clusters/non-profit attraction sustainability.

⁷⁰ (A Way Forward, Government of Newfoundland and Labrador, pg. 6, Department of Tourism, Culture, Industry and Innovation, 2017)

Summary of Core Products:

Season	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
Winter	Skiing (NSW and VIC), whale-watching, beaches, diving, snorkelling, hiking, bushwalks, adventure sports, culinary, wine, festivals, museums, entertainment, city life, outback, fishing, spa	City visits, food tours, winery visits, markets, festivals, museums, re-enactments, (dogsledding, skiing) nature viewing (northern lights, National Parks)	Wildlife, Cross country skiing, Dog sledding, Heliskiing, Northern Lights, Snowmobiling	Icelandic cuisine, geothermal spas, northern lights, caving, ice climbing, bird watching, festivals, ATVs and snowmobiling, sightseeing/fly-drive	Skiing, Geothermal	Dog mushing, northern lights viewing, Iditarod, Yukon Quest, cross country and alpine skiing, snowshoeing, heliskiing, snowmobiling	Storm watching, skiing, backcountry skiing, cross country skiing, downhill skiing, snowmobiling, dogsledding, snowshoeing	Skiing, snowmobiling; snow-shoeing
Summer	Beaches, diving, snorkelling, hiking, bushwalks, adventure sports, culinary, wine, festivals, museums, entertainment, city life, outback, fishing, spa	City visits, train/walking/cycling/driving journeys across Canada, food tours, winery visits, markets, festivals, museums, re-enactments, adventure (kayaking, skiing, hiking, paddle boarding, adrenaline sports, wildlife viewing), Nature Viewing (National Parks, wildlife reserves.)	Cruises, hiking, kayaking	Icelandic cuisine, Whale watching, geothermal spas, hiking, trail running, cycling, caving, ice climbing, bird watching, sightseeing/helicopter tours, festivals, ATVs and snowmobiling, sightseeing/fly-drive	Adventure sports, walking & trekking	Cruising (day tours and blue sea cruise packages, fishing, hiking, trekking, boating, camping, wildlife viewing, sea kayaking, state park visits, rafting, atv tours, rafting, glacier hikes, self drive	Biking, boating, camping, diving, fly-drive, fishing, wildlife viewing, golf, hiking, horseback riding and ranches, paddling, surfing, culinary, sightseeing, arts & heritage, breweries, distilleries, culinary (markets, restaurants, classes), wineries, Indigenous cultural experiences,	Whale watching; iceberg viewing; hiking & walking; cruise
Fall	Whale-watching, Beaches, diving, snorkelling, hiking, bushwalks, adventure sports, culinary, wine, festivals, museums, entertainment, city life, outback, fishing, spa	City visits, train/walking/cycling/driving journeys across Canada, food tours, winery visits, markets, festivals, museums, re-enactments, adventure (kayaking, skiing, hiking, paddle boarding, adrenaline sports, wildlife viewing) Nature Viewing (National Parks, wildlife reserves.)	Hiking, hunting, whale watching	Icelandic cuisine, geothermal spas, hiking, trail running, cycling, caving, ice climbing, bird watching, sightseeing/helicopter tours, festivals, ATVs and snowmobiling, sightseeing/fly-drive	Adventure sports, walking & trekking	Cruising (day tours and blue sea cruise packages, fishing, hiking, trekking, boating, camping, wildlife viewing, sea kayaking, state park visits, rafting, atv tours, rafting, glacier hikes, self drive	Biking, boating, camping, diving, fly-drive, fishing, wildlife viewing, golf, hiking, horseback riding and ranches, paddling, surfing, culinary, sightseeing, arts & heritage, breweries, distilleries, culinary (markets, restaurants, classes), wineries, Indigenous cultural experiences,	Iceberg viewing; hiking & walking; Puffin watching; site seeing (Cape Spear); kayaking/rafting; Geology & fossils; boat tours

Season	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
Spring	Beaches, diving, snorkelling, hiking, bushwalks, adventure sports, culinary, wine, festivals, museums, entertainment, city life, outback, fishing, spa	City visits, train/walking/cycling/driving journeys across Canada, food tours, winery visits, markets, festivals, museums, re-enactments, adventure (kayaking, skiing, hiking, paddle boarding, adrenaline sports, wildlife viewing), Nature Viewing (National Parks, wildlife reserves.)	Hiking, cultural tours	Icelandic cuisine, geothermal spas, hiking, trail running, cycling, caving, ice climbing, bird watching, sightseeing/helicopter tours, festivals, ATVs and snowmobiling, sightseeing/fly-drive	Water Fall Tours, Wine Tours	Cruising (day tours and blue sea cruise packages, fishing, hiking, trekking, boating, camping, wildlife viewing, sea kayaking, state park visits, rafting, atv tours, rafting, glacier hikes, self drive	Biking, boating, camping, diving, fly-drive, fishing, wildlife viewing, golf, hiking, horseback riding and ranches, paddling, surfing, culinary, sightseeing, arts & heritage, breweries, distilleries, culinary (markets, restaurants, classes), wineries, Indigenous cultural experiences,	Iceberg viewing; hiking & walking; Puffin watching; site seeing (Cape Spear); kayaking/rafting; Geology & fossils; boat tours

Key Takeaways for Yukon:

- Create a list of guidelines for a business in Yukon to be considered ‘market-ready’ and ‘export-ready.’
- Ensure a product development plan is in place to support a wide-spread marketing plan.
- Engage communities and associations to understand that working together on experiences makes the overall experience more competitive.
- Deliver an online marketing toolkit, providing basic information on how to market and promote a tourism business internationally, which steps should be taken when working with media, the trade, and for using online channels.
- Consider people and program based experiences highlighting Yukon’s rich culture and colourful characters.
- Create and promote Indigenous focused itineraries around those regions rich in Indigenous culture and product.

F. Indigenous Tourism Development

This section highlights the trajectory and level of focus that Indigenous Tourism Development has received among all destinations reviewed. Again it is worth noting that specific political, social and economic circumstances within each destination’s Indigenous populations have resulted in very different timelines and approaches.

Australia

The Aboriginal Tourism Australia (ATA) is the main non-profit national organization which promotes Indigenous

tourism within the different parts of the Australian country. This association focuses on the promotion of Aboriginal tourism along with the economic, cultural and environmental concerns of the Aboriginal tribes of Australia. New South Wales (NSW) is home to Australia's largest Aboriginal population with more than 80 different Tribal Groups. Destination NSW provides an example of how one state has strategized its Aboriginal tourism development, which could be considered by Yukon. The management organization created the Aboriginal Tourism Action Plan 2017-2020, an update from the 2013 - 2016 plan. The plan states its mission is "*to continue to support the development and promotion of NSW Aboriginal cultural tourism experiences, products and businesses.*"⁷¹ leading to a greater understanding of the richness of Aboriginal culture; and economic and social benefits for Aboriginal people, both as operators and employees." Destination NSW collaborates with a portfolio of Aboriginal cultural tourism stakeholders to continue to grow the valuable Aboriginal cultural tourism sector. They do this by:

- *Offering capacity and capability-building initiatives to support the development and growth of the Aboriginal cultural tourism industry*
- *Featuring market and export-ready* Aboriginal cultural tourism businesses in marketing and promotional campaigns to drive visitation*
- *Facilitating media and travel buyer visits to Aboriginal cultural tourism businesses*
- *Investing in events that incorporate Aboriginal culture to attract visitors to generate tourism benefit and media coverage for the State*
- *Advising businesses that wish to diversify into or work solely within the Aboriginal cultural tourism sector*
- *Providing support and leadership to the six new Destination Networks with the aim of improving industry engagement and the development of Aboriginal cultural tourism experiences*
- *Contributing to policy discussions on items impacting Aboriginal cultural tourism development.*⁷²

Discover Aboriginal Experiences is a tourism product comprised of 39 businesses providing Indigenous tourism experiences all over Australia, that are consistent, reliable, and understand how to work with travel trade. They were trained through the Indigenous Tourism Champions program put on by Tourism Australia, in partnership with Indigenous Business Australia, who identified the key businesses to be involved in this initiative. This collection of experiences are targeted to a specific markets interested in unique Aboriginal Experiences.

Canada

Indigenous Tourism Association of Canada (ITAC) is responsible for creating partnerships between various organizations and industry leaders, and to support the growth of Indigenous tourism through development and marketing of Indigenous experiences. ITAC has been very active in recent years collaborating with provincial, territorial and regional organizations across Canada to set up regional Indigenous tourism associations where they don't currently exist, for example Atlantic Canada and Manitoba. ITAC is funded by the Federal Ministry of Indigenous and Northern Affairs Canada as well as membership.

⁷¹ (Aboriginal Tourism Action Plan, Destination NSW, 2017-2020)

⁷² (Destination NSW and NSW Government, Aboriginal Tourism Action Plan 2017-2020, 2017, Pg. 8)

<https://www.destinationnsw.com.au/wp-content/uploads/2017/11/aboriginal-tourism-action-plan-2017-2020.pdf>

ITAC's strategic pillars, referenced in their 2016 - 2021 plan "The Path Forward" lays out these strategic directions:

1. Development
2. Marketing
3. Leadership
4. Partnership ⁷³

ITAC is a funding-partner of Destination Canada, co-marketing in select international markets.

Greenland

Greenland does not distinguish between indigenous and non-indigenous peoples (they recognize anyone who chooses to make Greenland their home as a Greenlander). However indigenous products are actively created and marketed and their tourism brand, Pioneering Nation, heavily showcases their culture in an honest and authentic way.

Iceland

Iceland has no recorded indigenous peoples.

New Zealand

New Zealand Māori Tourism was established in 2004 to provide an overarching direction and focus for Māori tourism. It is responsible for promoting, facilitating and leading the Māori tourism sector. In 2010, the government set aside USD\$3 million in funding over three years to strengthen and promote Māori tourism, recognizing that there is potential to increase the value of Māori tourism to the New Zealand economy as a whole, and to improve economic outcomes for Māori in particular.

New Zealand Māori Tourism led the development of a Māori Tourism Action Plan. The Ministry of Business, Innovation and Employment, Te Puni Kōkiri, Tourism New Zealand, New Zealand Trade and Enterprise, the Ministry for Culture and Heritage and the Department of Conservation formed a task force to support the development and implementation of the Action Plan. The Māori Tourism Action Plan's goal is to raise the quality and consistency of Māori tourism products, increase the capability and performance of Māori tourism operators and better promote Māori tourism. A standout feature in the plan is recognizing the value of integrating Māori tourism into existing investment in the tourism sector, rather than a separate initiative.

⁷³ (The Path Forward, ITAC, <https://www.dropbox.com/home/YUKON%20JURISDICTIONAL%20SCAN/Canada?preview=itac-five-year-plan-2016-2021-web.pdf>)

In 2014, funding for Māori Tourism was extended to USD\$1 million per annum for New Zealand Māori Tourism to continue to implement the Māori Tourism Action Plan.⁷⁴

Alaska

The Alaska Native Claims Settlement Act (ANCSA) was signed in 1971, and has ensured that Alaskan indigenous populations (including Inuit, Tlingit, Haida, Alaska Athabaskan, Aleut, and other tribal groupings⁷⁵) have had a largely different experience than those in other jurisdictions included in this report. Though this report cannot adequately assess living situation of Alaskan indigenous peoples, the primary difference is that they have been organized by land owning corporations since 1971. The American Indian Alaska Native Tourism Association was formed in 2009 and state their mission as to define, introduce, grow and sustain American Indian, Alaska Native and Hawaii Native tourism that honors tradition and value.⁷⁶ As a result of Alaska's multiple indigenous communities, TravelAlaska has organized information on each group by way of five regions: Iñupiaq & St. Lawrence Island Yupik, Athabaskan, Yup'ik & Cup'ik, Unanga and Sugpiaq (Alutiiq), and Eyak, Haida, Tsimshian, and Tlingit. Alaska native experiences are delivered to consumers in two ways, as native experiences, as well as in the form of native owned businesses, of which there are many. There is currently no clear strategy in place that focuses on Alaska native tourism development or organization.

British Columbia

Aboriginal Tourism Association of BC renamed in March 2018 to become Indigenous Tourism BC (ITBC). The organization was started in 1996 by Indigenous tourism providers to support advocacy, training, product development and marketing. The 2010 Olympics were a turning point for Indigenous tourism development in BC,⁷⁷ with the unprecedented focus, inclusion and celebration of Indigenous peoples in BC led by the Four Host First Nations cooperative at the organizing committee table. Since then tax revenue and revenue generated by the BC Indigenous Tourism industry have all increased steadily (see Table below.) According to ITBC's 2017 - 2022 Corporate Plan, "Pulling Together" there are more than 200 Aboriginal tourism businesses in BC, an 85 per cent increase over 2006. Since 2012, ITBC witnessed a 40% jump in membership to 85 members in 2016. If growth continues at this rate, the number could increase another 50 per cent, to nearly 130 by 2022. Indigenous tourism revenue is increasing as well - they surpassed \$38 million USD in 2015 and were projected to be \$52 million in 2017 (current numbers not available.)

⁷⁴ (Ministry of Business, Innovation & Employment, New Zealand Māori Tourism and the Māori Tourism Action Plan, July 17, 2015, <http://www.mbie.govt.nz/info-services/sectors-industries/tourism/supporting-maori-tourism/nz-maori-tourism-and-the-maori-tourism-action-plan>, July 2018)

⁷⁵ (World Directory of Ethnic and Minority Peoples <http://minorityrights.org/minorities/inuit-and-alaska-natives/> Accessed August 2018)

⁷⁶ (<https://www.ainta.org/>)

⁷⁷ (Vernon Morning Star, Tourism Offers Chance to Preserve Indigenous Culture, March 9, 2018, <https://www.vernonmorningstar.com/news/tourism-offers-chance-to-preserve-indigenous-culture/>)

Figure 11: Jobs, Tax Revenue and Revenue Generated by B.C.'s Indigenous Tourism Industry



Statistics from: AtBC Blueprint Strategy Tourism Performance Audit Report 2006-2012, May 2013
*Estimated

78

Destination BC is a funding partner of ITBC and the two work closely together on strategic initiatives and marketing. ITBC's current strategy, Pulling Together focuses on 4 main pillars:

- Marketing
- Experience Development
- Partnerships and Special Projects
- Leadership & Organizational Excellence

Newfoundland and Labrador

Newfoundland and Labrador Tourism, and other Atlantic Canada provinces, are only now starting to develop a Pan-Atlantic Indigenous tourism strategy, with Indigenous Tourism Association of Canada (ITAC) leading the way. The strategy, including the creation of an Indigenous Tourism Association for Atlantic Canada, is set for completion March 2018⁷⁹. Tourism experiences on the island of Newfoundland are limited. However the Mi'kmaq community of Conne River have been very active in the industry, providing powwow celebrations for cruise ship visitors and other groups for several years. In Labrador, where 89% of the population are Inuk, there is a strong indigenous tourism industry, with highlights including the Torngat Mountains Base Camp experience, a public private partnership with Parks Canada and local Inuit outfitters. The Nunatsiavut Tourism Association is the DMO for Northern Labrador's Inuit tourism experiences.

⁷⁸ (Pulling Together, Page 5, Indigenous Tourism BC)

⁷⁹ (CBC.ca, Indigenous Groups Work on Tourism Strategy for NL, Feb. 18, 2018, <https://www.cbc.ca/news/canada/newfoundland-labrador/boosting-indigenous-tourism-strategy-1.4537052>)

The following chart lists experiences noted on tourism websites as Indigenous tourism experiences:

Australia	Canada	Green-land	Iceland	New Zealand	Alaska	B.C.	Newfoundland
<ul style="list-style-type: none"> - Active experiences: Bushwalks, kayaking, hiking, quad biking - Aquatic and Coastal Wildlife experiences - Urban Experiences: Museums and art galleries - Outback experiences: explore working cattle stations, outback gorges, ancient rock art galleries and waterholes - Culinary Experiences 	<ul style="list-style-type: none"> -Arts & Culture: Museums, workshops, craft building, historical parks, galleries, cultural re enactments and interpretation, festivals -Food & Drink: Pow Wows, wineries, cooking classes, Indigenous cuisine -Nature & Wildlife: Fishing, Northern Lights viewing, wildlife viewing, guided interpretation -Outdoor Adventure: Snowmobiling, Wildlife viewing, guided hiking, kayaking, canoeing 	N/A	N/A	<ul style="list-style-type: none"> - Horse treks - Bushwalks - Indigenous accommodations (this refers to both Indigenous-owned businesses and those providing 'Maori' experiences at the site) - Surf & kite lessons - Heritage & cultural hikes, treks, and tours - Art retail - Wellbeing centres - Yachting & cruising - Bus tours - Biking tours - Art galleries - Hunting - Geothermal experiences - Indigenous performances - Dining - Wildlife tours - Waka tours 	<ul style="list-style-type: none"> - Native festivals including honoring animal spirits, blanket toss and potlatches - Art galleries - Art Workshops (including beading, basketry, carving, weaving) -Festivals - Museums and cultural centres including - RV rentals, cabin rentals, coach tours, boating, day cruises 	<ul style="list-style-type: none"> - Arts Galleries - Artist Studios - Workshops - Resort and Inns with Indigenous culinary experiences - Bear watching, big-horn sheep viewing, marine wildlife watching, whale watching - traditional lodging and sweat lodges - - guided boating, canoeing - guided fishing, hiking and walking, kayaking, stand-up paddle boarding 	<ul style="list-style-type: none"> - Cultural experiences/throat-singing, drum-dancing, Inuit games demonstrations - Northern Ranger Experience (cruise coastline, camp, hike with Inuit guides/interpreters) - Torngat Mountains Base Camp & Research Station (Hike, take part in research, fish, boat, visit Inuit historic sites)

Summary of Indigenous Tourism Development

	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
Association	Aboriginal Tourism Australia	Indigenous Tourism Association of Canada	N/A	N/A	NZ Maori Tourism	American Indian Alaska Native Tourism Association	Indigenous Tourism BC	Indigenous Tourism Association for Atlantic Canada (in development)
Strategic Focus	Promotion of Aboriginal tourism along with the economic, cultural and environmental concerns of the Aboriginal tribes of Australia.	1. Development 2. Marketing 3. Leadership 4. Partnership			To support leaders and partnerships that generate value in the Māori and wider tourism sector	Define, introduce, grow and sustain American Indian, Alaska Native and Hawaii tourism that honors traditions and values	Marketing; Experience Development; Partnerships and Special Projects; Leadership & Organizational Excellence	In development
Relationship with DMOs	Collaborators. Unsure of any funding relationship.	Collaborators and co-funders			Collaborators	Unclear	Collaborators & DBC are Funding partners	In development

Key Takeaways for Yukon

- In most jurisdictions where Indigenous tourism has been elevated, a long-term funding commitment has been made by the government.
- Partner with a local Indigenous business association or organization to have them recommend and put forth businesses that have the potential to be market and/or export ready with the proper training and resources.
- Create a Road Map that includes Indigenous Tourism Development, offering support and guidance for Indigenous tourism businesses at every stage of business readiness.
- Identify resources for getting Indigenous tourism businesses started, early development, established businesses looking to step up to the next level, and those that are export ready.
- Include discussions around Indigenous culture promotion in policy discussions and how to better leverage it in media and marketing initiatives already taking place with great success, in order to have Yukon be seen as a leading destination for Indigenous tourism.

G. Mitigating Overtourism

In recent years, the issue of overtourism has come to a head at destinations worldwide. Though not a new concern, the impressive increase in international tourism has increased the threat considerably. As such, in combination with industry pressure to put destination management on equal footing with destination marketing, more and more destinations are addressing overtourism in their strategic planning process.

Overtourism was not considered a major issue of current or near future concern for Newfoundland and Labrador, Australia or New Zealand. These three jurisdictions see better distribution of tourists around the country as being something to strive for (and have included ways in their tourist strategic plans) but still desired more visitors overall, not less. All three also have targeted the “conscientious traveller” in their strategic plans and marketing efforts

Australia

Australia notes the Great Barrier Reef being at risk from overexposure to tourists, but research did not uncover specific initiatives to address it from Destination Management Organization or national government perspective. On the other end of the spectrum, news articles have warned this could spark a “Last Chance Tourism” demand, further elevating the problem.⁸⁰

Canada

Overtourism is not considered a concern for Canada nationally, although interviews recognize compression is an issue in some areas of Canada. Destination Canada is addressing overtourism in these areas through encouraging seasonal and regional distribution in their marketing. Interviews note Canada has only been seeing increased visitor numbers for the past two years, and is still in “recovery mode.” The overall emphasis is on more visitors and more revenue.

Greenland

According to Interviews, overtourism is not currently a concern in Greenland, though they are conscious of the Icelandic situation and have expressed a general desire not to end up in the same situation.

There is an issue of capacity as it relates to one of the most iconic winter activities in Greenland: dogsledding. According to the tourism strategy, the activity is under massive pressure and is no longer able to meet the capacity of tourists. This is due to a steady decline in both the number of sled dogs (caused by the large expenses connected with keeping dogs) and the number of traditional hunters using sled dogs in their work⁸¹.

Since dogsledding is a major demand generator, Visit Greenland wants to ensure the quality of the experience is preserved and the providers adequately supported. They are currently moving to reduce taxation and increase the tax deduction opportunities for hunters and hobby mushers.

⁸⁰ (Why Australia Might be at Risk of Overtourism, The Conversation, 2018, <http://theconversation.com/why-australia-might-be-at-risk-of-overtourism-99213>)

⁸¹ Greenland Tourism Strategy, 2016-2019

Iceland

In Iceland, overtourism is a big concern. Iceland's government and industry are addressing this through efforts to better distribute tourists around the small country, increasing quality of tourism provider's service and safety, and marketing to tourist segments that represent a higher return. For example, in Iceland tourism is organized regionally, with each region's DMO holding a Destination Management Plan (DMP) which are joint policy statements with the following mandate: "*steering growth and development of areas over a certain amount of time; defining stakeholders' roles; specifying certain actions that each stakeholder is responsible for and what resources they need to carry out their responsibilities.*"⁸²

Specific Initiatives to Mitigate Overtourism in Iceland:

- 1) VAKINN - Iceland Tourism's official quality and environmental standards label.
- 2) Tourist Site Protection Fund - Promotes the development, maintenance and protection of tourist attractions.⁸³
- 3) Marketing emphasizes Iceland as a year-round destination, and drives tourists to visit all over the country, to lighten load of those sites already under strain
- 3) The Icelandic Pledge - tourists can pledge before arrival a series of agreements to preserve Iceland's wellbeing. This is communicated through social media and the main visitor website.⁸⁴
- 4) The Iceland Academy - primarily a marketing campaign, the academy teaches people the essentials of Iceland in a humorous way, while educating them on how to act respectfully in Iceland's sites⁸⁵
- 5) Airline Videos - some national carriers including Icelandair are playing videos about how to behave and protect Iceland's natural sites.
- 6) The Road Map for Tourism highlights the following key points to curb overtourism: "*All year round and in all regions in promotion and marketing campaigns, an emphasis shall be placed on increasing the percentage of domestic and foreign tourists in the off-peak season. A special emphasis ... on promoting the entire country, not least to attract tourists to all parts of the country in the off-peak season, and also to lighten the burden on those tourist sites that are under strain; Ensure that the national transport plan takes into account the needs of the tourism industry and the projected rise in the number of tourists; Ensure that the maintenance and development of air travel infrastructures are in-line with the rise in the number of tourists in the country; Increase the safety of tourists and prevention through, among other things, harmonised information and signposting throughout the country; Make effective Destination Management Plans (DMPs) for every region in the country; Select "model sites" that are known as such, both in Iceland and abroad, and start with the selection and design in 2016; Take tourist destinations into account in the organisation of municipalities and prioritise them in every region with an emphasis on developing facilities for tourists; Decide which tourist destinations in each region require access management and manage traffic around them, taking into account environmental and social carrying capacity concerns, guided by the principles of tourist safety; Define requirements for integrated solutions to support skills, quality, professionalism and know-how in the tourism industry and work on effective ways to improve them; Make plans regarding the manpower and training needs in the tourism industry in*

⁸² (Icelandic Tourist Board, Destination Management Plans, 2018, <https://www.ferdamalastofa.is/en/development/destination-management-plans-dmps>)

⁸³ (Tourist Site Protection Fund, Icelandic Tourist Board, 2018, <https://www.ferdamalastofa.is/en/quality-and-environment/the-tourist-site-protection-fund>)

⁸⁴ (The Icelandic Pledge, Promote Iceland, 2018, <https://www.inspiredbyiceland.com/icelandicpledge/>)

⁸⁵ (Promote Iceland, Iceland Academy, 2018, <http://traveltrade.inspiredbyiceland.com/safe-responsible-travel/iceland-academy/>)

each region; Establish effective risk management based on continuous risk assessment in line with the best models abroad; Boost the tourism department in the Ministry of Industries and Innovation; Systematically find ways to eradicate the black market in the sector.”⁸⁶

7) Safe Travel Iceland - The recent influx of uneducated and poorly prepared tourists have caused enormous strain on the country’s volunteer emergency services. Safe Travel Iceland allows visitors to register their travel plan, check weather and road conditions, locate mountain emergency huts and teaches them how to navigate sometimes dangerous driving conditions.⁸⁷

New Zealand

New Zealand’s Sustainability Commitment, outlined on the website: www.sustainabletourism.nz/ aims to see every New Zealand tourism business committed to sustainability by 2025, and have invited these businesses to adopt 14 industry commitments, categorized into economic, visitor, host community and environmental goals. (<http://sustainabletourism.nz/>) to reach the goal.

Alaska

Neither research nor interviews indicated that overtourism is currently a concern in Alaska. Those interviewed indicated that they felt the state’s tourism capacity is currently stretched during peak season and that congestion at key sites has clearly been identified by both tourists and industry alike, but there is no detailed strategy in place to address the issue. A combination of poor economic conditions and the fact that Alaska’s key tourism resources include public lands that are managed separate to the tourism industry, create a scenario where potential crowding issues appear to be handled on an ad hoc basis by the US Forest Service, the US National Park Service, the Alaska Department of Natural Resources, etc⁸⁸.

British Columbia

While sustainability language is used in all reports reviewed, there are few initiatives in place to mitigate against the risk of overtourism. BC’s mild climate, robust transportation infrastructure and product distribution throughout

⁸⁶ (Road Map for Tourism, Ministry of Tourism, Industry and Innovation, SAF, pg. 2015.

⁸⁷ (Safe Travel Iceland, Iceland Association for Search and Rescue, 2018, <https://safetravel.is/>)

⁸⁸ (Alaska takes a very modest approach toward overtourism at popular glacier <https://skift.com/2018/04/30/alaska-takes-a-very-modest-approach-toward-overtourism-at-popular-glacier/>)

the province supports natural visitor flow and distribution. Interviews suggest overtourism mitigation measures will be included in the Provincial tourism strategy refresh in development.

Newfoundland & Labrador

Newfoundland and Labrador Tourism's strategic directions is product development and includes implementing a set of Tourism Resource Management Principles, including an environmental code of conduct that balances the needs of the tourism industry with other resource-based industries to ensure protection and preservation of natural landscapes.⁸⁹

Summary of Mitigating Overtourism

	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
Tourism stage (Butler Model – see Figure 12)	Success	Success	Development	Success	Success	Development	Success	Success
Action to mitigate	Regional distribution	Seasonal and regional distribution	N/A	Seasonal and regional distribution	Seasonal and regional distribution	Gain government and community support for tourism	In development	N/A

⁸⁹ (A Way Forward, Government of Newfoundland and Labrador, pg. 6, Department of Tourism, Culture, Industry and Innovation, 2017)

Figure 12: Butler's Model of Tourism Development

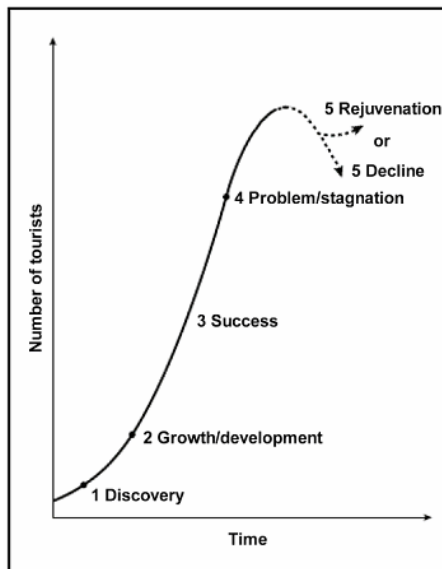


Figure 1. The five stages of the Butler Model

Key Takeaways for Yukon

- Consider tourism development for the long term (at least 10 years.)
- Develop strategies to distribute tourists throughout the territory.
- Develop campaigns to engage and enlighten tourists on how to behave in remote, nature destinations of Yukon.
- Create industry standards that promote sustainability.
- Promote year-round, or extended seasons.
- Promote off the beaten track locations.
- Be aware of the experiences that are in high-demand and mitigate any issues threatening the quality of the experience or the supply of providers.

H. Stakeholder Engagement

Findings were limited for this section and therefore only jurisdictions with noteworthy engagement have been broken out. The main theme across all jurisdictions for engagement with stakeholders was that regular in person meetings between public government entities and private industry (as opposed to the general public) was the key to program buy in, useful feedback and overall engagement of strategic tourism initiatives. Industry newsletters and websites were also referenced in research and interviews.

Canada

Destination Canada underwent a very robust stakeholder engagement process to develop current strategic plan, consulting with advisory committees, leaders of tourism marketing organizations, provinces, territories, and other industry stakeholders. The consultation structure helps bring together key stakeholders from industry and governments to share latest market insight. One concrete example of this DC is a member of the Air Consultative Committee co-chaired by Canada Border Services Agency and Transport Canada. This committee regularly meets to discuss developments in air transport policy and to share market research and tourism insights. DC also conducts Tourism Town Halls alongside TIAC.

Greenland

In November 2018, Greenland will hold its first stakeholder workshop, which is open to the public (provided they pay the \$230 USD fee.) The title of the workshop is ‘Towards Tourism Growth,’ and will bring together stakeholders from around the country. Prior to this, stakeholder consultations had been ad-hoc and constituted the following:

- Due to challenges of getting around Greenland, and ultimately holding in-person consultations in each region, Visit Greenland posts by-laws or initiatives on their website, to solicit feedback on (corporate.greenland.com/en/about-visit-greenland/consultation). Stakeholders can submit their feedback electronically. Visit Greenland will continue this practice, in addition to the workshop model.
- Board of directors comprised of five private sector individuals. Current board members are from hotels and airlines.

In addition, Visit Greenland keeps stakeholders abreast with six newsletters per year.

British Columbia

Current provincial strategy refresh includes a highly involved engagement process in the creation of 20 regional Destination Development Plans, which will feed into the greater strategy.

Summary of tools used to engage stakeholders

	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
One on one meetings/work shops	X	X	X	X	X	X	X	X
Newsletters	X	X	X	X	X		X	X
Industry website	X	X		X	X	X	X	X
Surveys	X	X			X			
Training & Workshops	X					X	X	X

Key Takeaways for Yukon

- Stakeholder engagement is most effective when in person in the form of workshops, roundtables, etc.
- Allow several months for stakeholder engagement to create the Yukon Tourism Development Strategy

I. Key Tourism Statistics

Numbers never tell us the whole story but they are part of the puzzle. The table below outlines key metrics related to tourism arrivals, spend and employment in each jurisdiction. The final line outlines the ratio of tourists to residents. This ratio of tourists to local residents can indicate potential pressures on the environmental and social resources. However, the ratio needs to be interpreted in the local context, and it is suggested to be used alongside other indicators to detect specific implications and adaptive management in the local context.

Jurisdiction ⁹⁰	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	NFLD	Yukon
Total spend by tourists (domestic & international)	\$41.7 bn USD ⁹¹ (2017) ⁹²	\$32bn USD (2017) ⁹³	Not measured Cruise tourists Approx \$4.1M USD(2015)	\$3.4 bn USD(2017) ⁹⁴	\$11 bn USD(2017) ⁹⁵	\$1.94 bn USD ⁹⁶	\$7.326 bn (estimated) USD ⁹⁷	\$441.2 million USD (2017) ⁹⁸	\$418 million estimate USD (2017) ⁹⁹
Employment	598,200 tourism jobs in 2017. ¹⁰⁰	720,000 (2018) ¹⁰¹	Not measured	19,500 tourism jobs in 2017. ¹⁰²	188,000 tourism jobs in 2017. ¹⁰³	47,000 (peak season) ¹⁰⁴	133,100 tourism jobs in 2015 ¹⁰⁵	18,000 tourism jobs in 2013 ¹⁰⁶	3,500 tourism jobs (2015) ¹⁰⁷
Annual visitor arrivals	8.8 million (2017)	20 million (2016) ¹⁰⁸	84,299 (2017) ¹⁰⁹	2.224 million (2017)	3.8 million (Year ending May 2018)	2.07 million ¹¹⁰	5.7 million (2017)	553,103 (2017)	334,000 (2017) Overnight visitation
Population	24.13 million	36.29 million	53,000	334,252	4.7 million	739,795 ¹¹¹	4.6 million	528,448	33,897
Residents/sq km	3.1	3.7	0.1	3.3	15.0	0.4	4.8	1.4	0.1
Tourists/sq km	1.1	2.0	0.0	21.6	14.2	1.2	6.0	0.7	0.7
Tourists: residents	3:1	1.8:1	1.5:1	6:1	0.8:1	2.8:1	1.23:1	1:1	9:1

⁹⁰ Countries & B.C. are international arrivals whereas Newfoundland, Alaska and Yukon include domestic (i.e. non-resident) travellers.

⁹¹ (State of the Industry, 2017, Government of Australia, <https://w.tra.gov.au/tra/soi/2017/index.html> accessed July 28th, 2018)

⁹² (WTTC, Economic Impact, Australia, 2017)

⁹³ (WTTC, Economic Impact, Canada 2017)

⁹⁴ (Tourism in Iceland in Figures, Icelandic Tourist Board, 2017)

⁹⁵ (WTTC, Economic Impact, New Zealand, 2017)

⁹⁶ (Tourism Works for Alaska <http://www.tourismworksforak.org/industry-data.html>)

⁹⁷ (Gaining the Edge, Destination BC, 2017)

⁹⁸ (Annual Performance Report, Newfoundland and Labrador Department of Tourism, Culture, Industry and Innovation, 2017 [https://www.tcii.gov.nl.ca/tourism/tourism_research/pdf/Annual_Performance_Report_2017_\(Final%20April%202018\).pdf](https://www.tcii.gov.nl.ca/tourism/tourism_research/pdf/Annual_Performance_Report_2017_(Final%20April%202018).pdf))

⁹⁹ (Yukon Tourism & Culture, 2017 Year End Report, https://tc.beta.gov.yk.ca/sites/default/files/2017yearendreport_final_0.pdf)

¹⁰⁰ (Tourism Satellite Account, Tourism Research Australia, <https://www.tra.gov.au/ArticleDocuments/254/Tourism%20Satellite%20Account%202016-17.pdf.aspx?Embed=Y>, 2016-17)

¹⁰¹ (Finding our North Star, Destination Canada, 2018-2022 <https://www.dropbox.com/home/YUKON%20JURISDICTIONAL%20SCAN/Canada?preview=2018-corporate-plan-summary-e-february-5-2018.pdf>)

¹⁰² (Tourism in Iceland in Figures, Icelandic Tourist Board, 2017)

¹⁰³ (Tourism Industry Aotearoa/Kantar TNS, Mood of the Nation, June 22, 2017, <https://www.tourismnewzealand.com/media/2916/mood-of-the-nation.pdf>, accessed July 2018)

¹⁰⁴ (Economic Impact of Alaska's Visitor Industry 2014 - 2015 https://www.commerce.alaska.gov/web/Portals/6/pub/TourismResearch/AVSP/Visitor%20Impacts%202016%20update%204_15_16.pdf)

¹⁰⁵ (TIABC, 2018, <http://www.tiabc.ca/>)

¹⁰⁶ (Uncommon Potential, Newfoundland and Labrador Department of Tourism, Culture, Industry and Innovation, 2015)

¹⁰⁷ (Tourism Yukon 2017 Year End Report, Yukon Tourism, 2017)

¹⁰⁸ (Destination Canada, www.destinationcanada.com)

¹⁰⁹ (Tourism Statistics Report, Greenland)

¹¹⁰ Economic Impact of Alaska's Visitor Industry 2014- 2015 https://www.commerce.alaska.gov/web/Portals/6/pub/TourismResearch/AVSP/Visitor%20Impacts%202016%20update%204_15_16.pdf)

¹¹¹ US Census Bureau <https://www.census.gov/quickfacts/ak>)

J. Tourism Arrivals

The following table outlines the tourism arrivals from the top ten source markets for each jurisdiction. The data is from 2017 or the most recent year available. Important source markets are generally geographically nearby (see New Zealand and Australia's reciprocal importance) and with strong air connections (see USA's importance to Iceland).

Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland	Yukon
2017: 1. New Zealand (1,356,400) 2. China (1,355,500) 3. USA (781,000) 4. UK (731,900) 5. Japan (434,600) 6. Singapore (434,400) 7. Malaysia (396,400) 8. India (302,200) 9. South Korea (301,800) 10. Hong Kong (282,100)	2017: USA: 14.3 million UK: 801,000 China: 682,000 France: 571,000 Germany: 388,000 Australia: 375,000 Mexico: 359,000 Japan: 304,000 South Korea: 286,000 India: 254,000	1. Denmark (29,259) 2. Germany (4517) 3. USA (3,481) 4. France (2,312) 5. China (1,426) 6. UK (1,416) 7. Canada (1,380) 8. Sweden (1,240) 9. Norway (1,177) 10. Iceland (1,079)	2017: 1. USA (576,403) 2. UK (322,403) 3. Germany (155, 813) 4. Canada (103,026) 5. France (100, 374) 6. Spain (57,971) 7. Denmark (53,240) 8. Sweden (56,229) 9. Netherlands (49,164) 10. Norway (47,958)	2017: 1. Australia (1,479,000) 2. China (448,000) 3. USA (338,000) 4. UK (251,000) 5. Germany (102,000) 6. Japan (101,000) 2016 (UNWTO ¹¹²) 7. Argentina (15,344) 8. Malaysia (51,792) 9. Philippines (20,384) 10. Indonesia (19,632)	2016 1. Australia (44,000) 2. UK (28,000) 3. New Zealand (17,000) 4. Germany (15,000) 5. India (8,000) 6. Japan (6,000) 7. China (5,000) 8. Switzerland (3,000) 9. Netherlands (3,000) 10. Italy (3,000) ¹¹³	2017: 1. USA (5,896,036) 2. China (334,994) 3. Australia (266,196) 4. United Kingdom (230,167) 5. Mexico (133,527) 6. Japan (159,336) 7. South Korea (112,127) 8. Germany (104,128) 9. Hong Kong (89,857) 10. SE Asia (81,628)	2015-2020: 1. Canada - (Toronto, Ottawa, Calgary, Halifax and Montreal) 2. United States (mid-Atlantic region & California) 3. UK	2017: 1. USA: 308,099 2. Canada: 82, 110 3. Overseas: 46,670 ¹¹⁴

Key Takeaways for Yukon

- Judging by the table above, the international source markets with the highest demand for Yukon's experiences will be:
 - USA (geographically close compared to other international destinations).
 - Australia/New Zealand (tend to have long lengths of stay in North America)
 - Established markets in continental Europe: France, Germany, UK (intrepid, and tend to have long lengths of stay).
 - Asia, especially China, Japan and Hong Kong (seek out Arctic experiences and have large amounts of disposable income).

¹¹² UNWTO Yearbook of Tourism Statistics, UNWTO, 2018

*Arrival numbers per market not available

¹¹³ (Alaska Visitors Statistics Program VII <http://www.alaskatourism.org/marketing/AVSP%20VII/19.%20AVSP%207%20International.pdf>)

¹¹⁴ (Tourism Yukon. 2017 Year End Report)

- The table above looks at international tourists, as it is difficult for destinations to measure domestic tourists. But Yukon would do well to target Canadian tourists, as the offering is substantially different from other destinations in Canada.
- Mexican arrivals to the USA are down (thanks to the ‘Trump Slump’) and Canada is the primary beneficiary. Taking advantage of this, Yukon may seek to take Mexican market share away from Alaska.

K. Tourism Marketing

All jurisdictions scanned had exceptional marketing efforts designed to generate a strong sense of place, and to attract the high value, low volume tourist. While some like Australia spent millions on advertising campaigns, others like Iceland began with clever social media campaigns that relied heavily on volunteers to get the word out through social media.

Marketing Overview

Marketing Tools/Targets	Australia	Canada	Greenland	Iceland	New Zealand	Alaska	B.C.	Newfoundland
Main Consumer Facing Website	www.australia.com	caen-keepexploring.canada.travel/	www.Greenland.com	www.inspiredbyceland.com	www.newzealand.com	www.travelalaska.com	www.hellobc.com	www.newfoundlandlabrador.com
Markets being targeted on website	Americas (Canada, Brazil, US) Europe (UK, Germany, France, Italy) Greater China Japan South Korea South and Southeast Asia (Singapore, Malaysia, India, Indonesia) New Zealand (Business Events market only)	Does not indicate, but main target markets are: USA UK China France Germany Australia Mexico Japan South Korea India	English-speaking countries Denmark German-speaking countries	US/Canada United Kingdom Germany Denmark Spain France Japan Norway Italy Sweden Netherlands China Russia	Australia China Germany Japan United Kingdom United States Canada Brazil and Argentina India South Korea South East Asia	Does not indicate. However the website is available in the following languages: English German Spanish (MX) Spanish (ES) Chinese Korean Japanese	Does not indicate. However target markets are: BC Alberta, US (Washington, California) China Mexico Ontario UK, Germany Australia Japan South Korea India	US/Canada Quebec United Kingdom/Ireland
Tagline	“There’s nothing like Australia”	Keep Exploring”	“Pioneering Nation”	“Inspired by Iceland”	“100% Pure New Zealand”	“Beyond Your Dreams, Within Your Reach”	“Super. Natural British Columbia.”	“Find Yourself Here”

Annex 1

Glossary

Compression – When tourism destinations are over-capacity, putting a strain on accommodations and infrastructure, and causing pricing to increase.

High-yield - tourists who typically opt for higher valued tour products and services, thus having a higher average spend per day, resulting in a higher (financial) yield for the destination

High-end - products and services that are higher valued, thus are priced higher than the average, similar product or service

Overtourism - used to describe a destination experiencing a higher volume of tourists than their infrastructure, support and/or environment would otherwise allow

Path to Purchase - the chain of channels that consumers utilize in order to ‘convert’ to a purchase. This chain includes internet, email, social media etc.

Destination Management Company: A tour operator or travel agent specializing in services for incoming visitors, such as within their own city, province, region or country. Provide services at the destination to group or FIT travel organizers/tour operators. Contracts with individual tourism suppliers.

Destination Marketing / Management Organization: Destination marketing / management organizations work with provincial marketing organizations, tourism suppliers, travel trade, operators, associations, regional tourism organizations, legislators and government to collaboratively promote tourism growth within the region. They can provide support, resources and introductions and are a key resource for growing international market presence.

Market ready: Refers to a business that markets to potential visitors, that communicates with potential visitors year-round, and is ready to accept advanced reservations.

Annex 2

Attached Matrix