



Allowing our stories to shine Larger than Life

2019-20 MARKETING STRATEGY

A strategy to share Yukon's stories

Through the lense of our Larger than Life brand, we share the rich culture and wonder of the Yukon with curious travellers. We deliver our incredible stories in the right place, at the right time through a targeted approach to consumer marketing. We begin by getting on the radar of potential travellers and then remain present throughout their decision making journey. Our 2019-2020 plan builds on past success, while increasing our focus towards sharing relevant and compelling Yukon content with potential visitors.



Introduction



Photo credit: Atsushi Sugimoto

OUR GOAL:
IMPLEMENT A DESTINATION MARKETING PROGRAM
THAT WILL CONTRIBUTE TO A THRIVING TOURISM ECONOMY
IN THE FORM OF INCREASED REVENUES TO TOURISM BUSINESSES.

Building on past success...

2018 saw the Yukon welcome a record number of visitors to the territory. In fact, for the first time in our history, more than 500,000 visitors travelled to the Yukon. This is an incredible achievement for our destination, particularly given that while Canada as a whole also achieved record visitation in 2018, not all Canadian provinces or territories could say the same. Our team is proud to be part of the community of tourism stakeholders, DMO's and businesses that contributed to these amazing results and we look forward to the pursuit of another record year in 2019-20.

The Yukon is at a special time in its destination development. Following the increased investments in marketing beginning of 2015-16 through the Yukon Now Program, Yukon has gained significant market share in Canada and around the globe. The Yukon Tourism Development Strategy, Our Path, Our Future, was born as the result of one of the widest engagements in the history of the Yukon Government. It lays out a clear 10-year vision towards the goal of doubling revenues attributable to tourism while ensuring the future sustainability of our sector that will guide our efforts at Tourism Yukon, across the government, and throughout the entire tourism community in the Yukon. The direction provided through the strategy was clear; implement a marketing program that will contribute to a thriving tourism and continue to market the Yukon as a year-round destination, and that's just what we'll do.

In 2019-2020, we will continue to connect potential visitors with the Yukon's Larger than Life brand. The 2018 Visitor Exit Survey and the Whitehorse Airport Exit Survey will give us great insight into the origin, length of stay and spending habits of our visitors. Utilizing this data, we will conduct an assessment of our global markets and their classifications to ensure current investments are aligned with market trends. In addition, we are adopting enhanced Destination Canada research tools that have been shaped as a result of our participation in Destination Canada's Northstar 22 initiative. These tools have given us better data than ever before in our history and will allow us to develop and implement a measurement strategy and related dashboard for all North America consumer marketing activities.

Our updated content strategy, with Destination Canada's Explorer

Quotient research at its core, combined with the increasingly surgical digital marketing tools available to us, provide the ability to share the Yukon's incredible story to consumers more cost-effectively, and more compellingly, than ever before. We will continue to adopt the use of our customer relationship management (CRM) system into our daily business and new tools such as our e-newsletter, while continuing to make content enhancements to our TravelYukon.com website. We will also take steps to enhance our partnerships with proven producers in our overseas markets through the development of our new travel trade key account strategy and we will lend our market intelligence to

product and experience development initiatives to assist our industry to appeal to a broad, contemporary tourism audience.

We look forward to working with our industry partners to begin the next chapter in our destination's, development and invite you to explore how we will do just that in the following pages.

- Robin Anderson, Global Marketing Manager

Photo credit: Atsushi Sugimoto

Why invest in strategic tourism marketing?

A healthy and sustainable tourism sector raises revenue not only for local tourism businesses, but also for other businesses in the supply chain as well as providing spillover benefits to other sectors and raising the overall quality of life of Yukoners.

Tourism is the Yukon's second largest industry and its largest private sector employer. As tourism grows, the number of tourism-related jobs increases and so does the percentage of the Yukon's GDP attributable to tourism which benefits all Yukoners.

The role of Tourism Yukon is to present the Yukon in key global markets as a compelling, year-round travel destination that offers authentic experiences and unique stories.

By maximizing the reach and effectiveness of our marketing programs and by working in collaboration with stakeholders, our goal is to grow the visitor economy for the long term benefit of the tourism industry.

Yukon's Visitor Industry by the numbers:

4.4% OR
\$117.2 MILLION

OF TOTAL ANNUAL GDP ATTRIBUTABLE TO TOURISM IN 2016

\$262.9 MILLION

ANNUAL REVENUE GENERATED BY YUKON
BUSINESSES ATTRIBUTED TO TOURISM IN 2016

APPROX.

3,500 JOBS

IN THE YUKON'S TOURISM SECTOR REPRESENTING
13.5% OF THE WORKFORCE (2016 FIGURES)

SOURCE: YUKON BUSINESS SURVEY

Our North Star

Tourism Yukon is a part of the community of storytellers who provide a window into the culture and natural phenomena that compels the world's adventurers, lovers of beauty, and constant explorers to discover the Yukon. We are a source of inspiration, knowledge and practical wisdom for those seeking to experience a place that has no comparison.



The Larger than Life brand

Developing and maintaining a consistent tourism brand is critical in today's crowded and increasingly competitive tourism marketing landscape.

A strong brand identity allows us to create an emotional connection with consumers and share not only our own stories, but also theirs. Through the brand, we create a sense of place, drive customer loyalty, command attention, and maintain relevancy.

The Larger than Life brand is about authentic stories, remarkable experiences, a rich history and unique culture, and unparalleled nature. The brand positions us as a place filled with possibility with a sense of wonder and discovery. Somewhere that captivates its travellers under the spell of the midnight sun and the dance of the northern lights. Drawing you in with its wide-open spaces and untouched beauty. Telling you richly woven stories through arts, culture, and the warmth of the locals.

The Larger than Life brand is more than just the logo — it is our manifesto. It frames all of our communications in all channels. In our written and spoken communications, our tone of voice is authentic and down-to-earth, using simple but powerful language — emoting the feeling of open arms, open doors and open minds. It conveys the friendliness, playfulness, and approachability of the people who live here. Our visual communication showcases our awesome natural phenomena while capturing the magic of people experiencing it to its fullest. Our style is real, natural, and in-the-moment, with attention to real life detail as well as creating a sense of the scale of our environment.





A Consumer-Centric Approach

What does this mean? Simply put, it means that we will put the consumer at the heart of everything we do. As an emerging destination in a highly competitive market, we need to move away from the traditional “here today, gone tomorrow” approach that no longer provides us with the profile we require.

All of our marketing, in all channels, will be approached holistically, with an emphasis on generating Yukon-specific travel leads within the digital environment. Digital marketing campaigns will be deployed on a year-round basis with increased activity during key engagement

periods as opposed to less frequent, short duration campaigns. They will be designed to drive awareness and demand, ultimately resulting in the acquisition of new leads.

These leads will, in turn, be nurtured through our engagement efforts in both our paid and owned channels. Content themes that shape our marketing creative will also be emphasized through our media relations program. The content generated by travel journalists and influencers will then be shared with consumers throughout our paid and owned channels. Additionally, content produced under the content strategy will be passed along to our international sales team and the travel trade in all overseas markets to assist them in sharing the Yukon story with their target consumers, helping them to drive sales. We also ensure that our content and marketing creative aligns with Destination Canada in the US and other international markets.

Through this integrated approach to marketing content and channels such as digital advertising, social media, media relations, our websites and email marketing, we highlight the themes that resonate with our target consumers, provide clarity of voice, consistency in messaging, and the maximum amount of exposure within our target markets.



Content Marketing

Why is content important and why are we moving down this path? Destination content has exploded in recent years because travellers have told destination marketers that it's a valuable and profitable practice to share the story of a destination from many different perspectives.

Whereas once destinations pushed out content to potential travellers through static, mass, one-way communications, travellers now demand personalized, two-way communication — content that is made just for them depending upon where they are on the purchase journey. And they want to do more than just consume that content. They want to participate in it, interact with us, and share it.

Content marketing is about giving the prospective traveller what they want. It's about telling our own story and letting travellers tell theirs and share their experience. Price, promotion, and product do not tell the complete Yukon story. The travellers who choose to come to the Yukon are those who are passionate about experiencing the world but they want to see, feel and learn about it before they come here.

This is why we've created a strategy that is all about the traveller and their motivations to travel first and foremost. Our content strategy is about telling emotional, experiential stories that connect with prospective travellers on a human level that are designed to pull them in through engaging, compelling, personalized content. It's meant to drive awareness and consideration. In other words, we want to find and nurture the best possible prospects for a future trip to the Yukon.

THE YUKON'S CONTENT VISION

Our content vision describes the essence of the Yukon experience, the target audience, and Tourism Yukon's role and place in telling the Yukon story:

The Yukon is a welcoming and generous destination of unparalleled beauty and authenticity that captivates visitors under the spell of the midnight sun and the dance of northern lights. Here, visitors feel deeply connected to the land, the pristine wilderness that surrounds them, and the people they encounter or share their journey with. Yukon's rich and unique history, paired with its exceptional geographical location, fuels and nurtures creative, innovative and pioneering spirits.

Tourism Yukon is a part of the community of storytellers who provide a window into the culture and natural phenomena that compels the world's adventurers, lovers of beauty, and constant explorers to discover the Yukon. We are a source of inspiration, knowledge and practical wisdom for those seeking to experience a place that has no comparison.

Our Best Customers

In order to maximize our return on marketing investments, identifying the right target audience is critical. Tourism Yukon does this by analysing the foundational traveller research provided through our investment in Destination Canada's Explorer Quotient® (EQ®). Not only does this research enable us to identify our best primary and secondary target consumers, it also helps us to refine our understanding of their behaviours and motivators. While each segment has their own view of the world and social values, they share many of the same experience drivers that guide their travel decisions. With this knowledge, we can customize our marketing efforts in each market and more effectively move our best customers along the path to purchase.

Globally, we are targeting Authentic Experiencers and Cultural Explorers who collectively form our primary target segments. In Canada, we have also identified No Hassle Travellers and Free Spirits as secondary targets.



Our Best Customers: Learners

AUTHENTIC EXPERIENCERS

Understated travellers looking for authentic, tangible engagement with destinations. Authentic Experiencers have a particularly strong interest in understanding the history of the places they visit through hands-on learning.



51%

55+ YEARS OLD
AVG: 52

51% MALE
49% FEMALE

INCOME (CAD): Average
EDUCATION: Higher than average
OCCUPATION: Higher than average retired

CULTURAL EXPLORERS

Cultural Explorers are defined by their love of constant travel. They embrace, discover and immerse themselves in the culture, people and settings of the places they visit.



47%

35—54 YEARS OLD
AVG: 44

34% MALE
66% FEMALE

INCOME (CAD): Average
EDUCATION: Average
OCCUPATION: Most full-time, higher than average homemaker (8%)

NO-HASSLE TRAVELLERS

No-Hassle Travellers are cautious, dutiful and reserved people who seek secure group travel that allows them to escape from the duties and obligations of everyday life.



52%

55+ YEARS OLD
AVG: 54

52% MALE
48% FEMALE

INCOME (CAD): Higher than average
EDUCATION: Higher than average
OCCUPATION: Full-time, more likely than average retired

FREE SPIRITS

Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they bask in hedonistic experiences that are shared with others.



44%

35—54 YEARS OLD
AVG: 43

39% MALE
61% FEMALE

INCOME (CAD): Slightly higher than average
EDUCATION: Higher than average
OCCUPATION: Full-time. Lower proportion retired

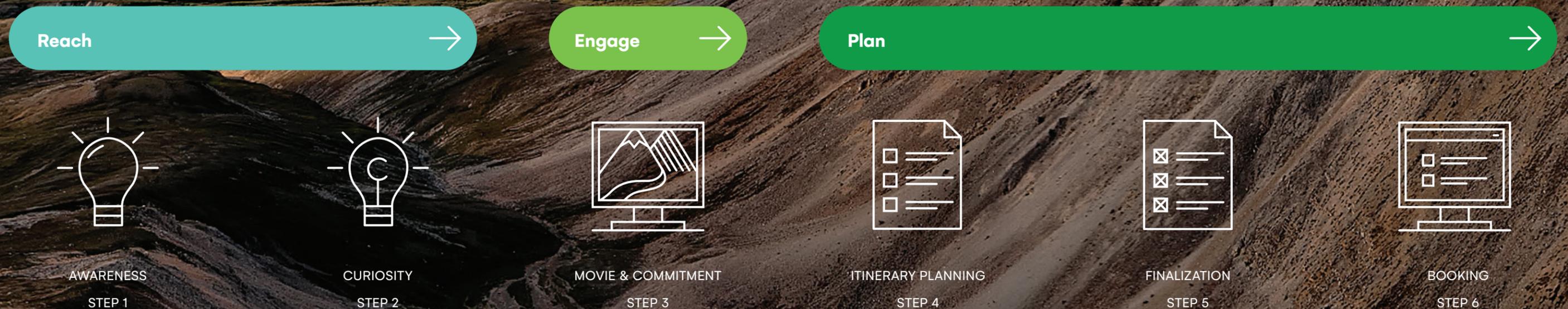
Path to Purchase

An understanding of a consumer’s journey along the path-to-purchase model, from destination awareness, through visiting the Yukon, to becoming an advocate for the Yukon, allows us to strategically improve our marketing effectiveness. By engaging consumers in multiple channels with tailored stories and marketing tactics at relevant points along this path we can successfully motivate them through each stage.

Tourism Yukon’s programs play a role in steps one through five. However, our primary efforts focus on steps two through four.

Active engagement of consumers begins at step two where consumers dream about someday travelling to the Yukon but do not have concrete plans to do so and lack information about what the destination has to offer.

In step five and beyond, our role becomes less involved and more supportive — assisting consumers to finalize travel plans, including the sharing of travel packages designed by Yukon tourism businesses.



Tourism Yukon employs an integrated multi-channel approach in order to reach our target travellers globally. This strategy allows us to not only connect with consumers through multiple touch points, but to achieve greater efficiency, consistency of brand and influence.

Our Marketing Channels

Our Marketing Channels

CONSUMER MARKETING

Consumer marketing involves communicating directly with our target travellers via a range of strategies. Our goal is to inspire, engage and move them along the path to purchase by serving “the right content, to the right people, at the right time”, particularly in the digital domain. We market directly to consumers in the North American markets. In the overseas markets, we target consumers through strategic partnerships with key tour operators.

TRAVEL TRADE

The travel trade is vital to Tourism Yukon’s marketing efforts, particularly in overseas markets. The travel trade encompasses all the supply chain stakeholders from airlines and receptive tour operators through tour operators, wholesalers, online travel agencies to retail travel agents. By working in partnership with the travel trade we can leverage our investments, reach target travellers with specific and timely offers, and increase Yukon products available in each market.

MEDIA, PR AND INFLUENCERS

One of the most cost effective ways to increase destination awareness is through earned media coverage and public relations exposure. By building and maintaining strong relationships with media outlets, journalists and social media influencers globally, we can maximize our investments while building quality content for use in other channel marketing activities.

MEETINGS, INCENTIVES, CONFERENCES & EVENTS (MICE) AND SPORT TOURISM

Tourism Yukon continues to partner with the Yukon Convention Bureau (YCB), which implements a marketing plan designed to promote the Yukon as a MICE destination. We also partner with Sport Yukon to support the organization’s sport tourism marketing efforts targeted towards national, regional and local sports organizations and stakeholders.





Measurement

Fundamental to all marketing programs is performance measurement. Tourism Yukon sets targets that include several key performance indicators for all of our consumer marketing programs.

Targets for paid media activities include impressions, website visits, clicks and click-throughs to operator sites. Social media targets include likes, shares and comments. For earned media (i.e. stories written by travel writers in newspapers and magazines) the equivalent advertising cost is the usual metric.

Similarly, Key Performance Indicators are set by our market development team to help measure the effectiveness of their work with the international travel trade. These metrics can include the amount of Yukon product being carried by a tour operator year on year, leveraged co-operative marketing amounts, the number of familiarization tours hosted, and equivalent advertising costs of stories written by travel writers, etc.

But this only tells part of the story. Our goal is to better quantify the effectiveness of our marketing communications by ensuring we go beyond clicks and likes to get the “story behind the story”. Six million impressions sound great, but what does it really mean? In today’s world, where awareness plus engagement equals visitation, we need to create the tools to measure this.

Therefore, in 2019–20, we will continue to further refine our measurement approach by building on efforts that began in 2017. The goal is to create

a marketing dashboard that aggregates the results of work being done in all channels. This will help to better quantify our results and go beyond campaigns to measure the accumulated effect of our efforts. In the international markets, new metrics will also be developed in partnership with key accounts to better define our success there.

Global Market Overview

Tourism Yukon is currently targeting eleven geographic markets and we are monitoring three additional markets. Our investments, activities and support for each market are determined by whether the market is classified as Primary, Secondary, Emerging or Monitor.

Markets are initially evaluated using market intelligence from a variety of data sources. In addition, several other factors are also analyzed. Awareness of Canada as a tourism destination is critical. Destination Canada's presence in a market not only supports Tourism Yukon's marketing activities but also provides important and timely market insight. Air accessibility also factors into our decisions — travellers from any market should ideally be able to get here with only one or two stops. Finally, we also consider the types of travel products desired from any traveller and whether that matches what we currently or could potentially offer.

As part of our annual planning process, Tourism Yukon conducts an assessment of each geo-market to review performance over the past year to determine future potential. This ensures that markets with the most potential for the Yukon are prioritized both in terms of budget and related marketing activities. And finally, every few years, Tourism Yukon conducts a Marketing Portfolio Assessment (MPA) to assess the opportunity for growth and to guide investments being made in each of the target geo-markets. The MPA draws on research, industry intelligence, empirical data and key performance indicators that enable strategic geo-market assessment that ultimately drives research-based budget allocations. The most recent MPA was completed in 2014.

The next MPA is anticipated to be conducted in Fall 2019 working using up to date data from the Visitor Exit Survey, currently underway.





Global Market Overview



PRIMARY MARKETS
CANADA, USA, GERMAN-SPEAKING EUROPE

CHANNELS
CONSUMER, TRADE, MEDIA RELATIONS/PR,
AND MICE (CANADA-ONLY)



SECONDARY MARKETS
UNITED KINGDOM, AUSTRALIA, JAPAN

CHANNELS
TRADE, MEDIA RELATIONS/PR, AND CONSUMER
(WHERE DEEMED APPROPRIATE)



EMERGING MARKETS
NETHERLANDS (BENELUX), FRANCE, CHINA

CHANNELS
MEDIA RELATIONS/PR, TRADE AND LIMITED
CONSUMER



MONITOR MARKET
SOUTH KOREA, MEXICO, BRAZIL

CHANNELS
RESPONSIVE TO TRADE, MEDIA RELATIONS
INQUIRIES



North America



2ND

CANADA IS ALSO EXPECTED TO EXPERIENCE THE SECOND-FASTEST GROWTH AMONG THE G7.

DOMESTIC OVERNIGHT VISITS TO THE YUKON INCREASED BY AN ESTIMATED 3.3 PERCENT IN 2018.

Photo credit: Fritz Mueller

Canada

Growth in the Canadian economy is projected to continue to slow down through 2019. Consumer confidence has declined, with rising interest rates, slower growth in household wealth and rising energy costs placing increased pressure on household budgets. Despite the signing of the new USMCA trade agreement, there is still concern about trade in the business sector which is resulting in lower investment intentions going forward.¹ The Canadian dollar is forecast to remain relatively close to current levels against the US dollar during 2019.

Overall, growth in domestic overnight travel in 2018 was modest, expanding just 1.6%, although this was not unexpected following a strong 2017. Also dampening demand was the increasing cost of travel, with travel prices advancing sharply in 2018, particularly for accommodation and transportation.

In 2019, domestic pleasure travel is forecast to expand but will be moderated by financial concerns facing Canadian households. Air capacity is expected to remain flat through to summer 2019 which means Canadians will not see more competitive travel options.²

Visit USA aggressively targets Canadian travellers who are more likely to head south of the border for leisure travel than they are to stay within Canada. Twenty-five percent of Canadian travellers are actively planning a visit to the U.S. while an additional 30% are considering a visit within the next year. Younger travellers aged 18 - 34 offer the best immediate opportunity as their trip planning is further advanced and they represent a larger lifetime value opportunity. However, attracting this group requires improving perceptions around the time required and value offered by domestic travel.³

Global Tourism Watch estimates that the immediate potential domestic market is 9.57 million (those definitely or very likely to travel within Canada but out of province in the next year). Seven percent (up from 5% in 2016) of these have expressed interest in visiting the North with 4% to Whitehorse and 3% to Dawson City. The key barrier to travel within Canada is overall cost which is mentioned twice as often as the next barrier which is the price of gas.

The top trip anchor activities for Canadian travellers include natural attractions, historic sites, nature parks and northern lights.⁴



Photo credit: J Bradley

Domestic overnight visits to the Yukon increased by an estimated 3.3 percent in 2018. Business travel is expected to grow with new mines coming online and the Conference Board of Canada forecasts annual average growth to be around 4% over the next four years.⁵

Several key travel trends are shaping the Canadian travel market in 2019. The desire for transformational travel – the next level of experiential travel – means travellers are focusing on adding purpose to their trips. Social media, particularly Instagram, continues to have an overwhelming influence on the decision-making process. Finally, access to new destination is considered the new luxury with travellers wanting to explore hard-to-get bucket list experiences.⁶

THE INSIDE TRACK

While the traditional Authentic Experiencers segment represents a strong and well-performing market segment for the Yukon, youthful-minded Cultural Explorers present a significant opportunity for the Yukon because they are “pioneer travellers”. They are ahead of travel trends and they visit destinations that may be viewed as “bucket-list destination” by other segments. Given their level of tech savvy and social media connectivity, younger Cultural Explorers can create buzz around emerging destinations and products.⁷

Creating new and dynamic products is the key for this important segment. Medium to high-end lodge accommodation, front country day tours, multiday soft adventure programs in territorial and national parks, unique aurora viewing options and First Nations-themed products are all in demand.

¹ Hermus, Greg. Travel Markets Outlook: National Focus—Autumn 2018/Winter 2019. Ottawa: The Conference Board of Canada, 2019.

² Hermus, Greg. Travel Markets Outlook: National Focus—Autumn 2018/Winter 2019. Ottawa: The Conference Board of Canada, 2019.

³ Global Tourism Watch 2017

⁴ Global Tourism Watch 2017

⁵ Hermus, Greg. Travel Markets Outlook: National Focus—Autumn 2018/Winter 2019. Ottawa: The Conference Board of Canada, 2019.⁶ Global Tourism Watch 2016

⁶ <http://www.travelweek.ca/news/2019-trend-report-transformational-travel-and-are-those-real-followers-or-just-bots/>

⁷ Global Tourism Watch 2016

United States

The U.S. economy remains strong with tax reforms in 2018 driving record low unemployment, increased business investment and strong consumer confidence. U.S. economic growth continues to propel global growth. A forecast slowdown in GDP to 2.3% in 2019 is a side effect of continuing trade tensions with China. Inflation is likely to remain relatively stable at 1.9% and analysts predict there will be only one interest rate increase mid-year.¹ The U.S. dollar will soften slightly in the medium term.²

Between January and July 2018 the number of U.S. outbound travellers was 9.6 million, an increase of 5.6% year to date.³ As of November 2018, the number of American visitors to Canada had increased 1% to 13.5 million with the annual forecast being growth of 3% to 14.8 million.⁴ This represents the highest number since 2005. The strong state of the U.S. economy is expected to drive tourism demand for Canada and the Conference Board of Canada predicts U.S. arrivals will grow at a faster rate in 2019 thanks to more moderate rises in travel prices. The main barrier to travel continues to be the perceived cost with almost one third of potential travellers citing this as a deterrent.⁵

Several key trends for 2019 have emerged including the so-called over-tourism, personalization and artificial intelligence. The issue of over-tourism may lead travellers to avoid crowded tourism spots and shift towards less travelled destinations. Personalization is also increasingly important and allied to that is the growing use of artificial intelligence which improves the booking experience.⁶

Destination Canada has identified a potential market of 53 million travellers keen to visit Canada in the next two years. The potential market for Canada's north is 3.8 million.⁷ Learners 25-44 are a key market segment who seek distinctive experiences and cultures, crave learning and adventures that challenge them. They want experiential trips that stimulate them and give them a fresh perspective on life so that they can share their knowledge and opinions with others.⁸ The U.S. is by far the largest international market for the Yukon in terms of visitor numbers. As of November 2018, the number of U.S. visitors to the Yukon was up 12.6% to 154,785. Auto traffic grew by 2.8%, while non-auto traffic was up 29.8%. Although gas prices are expected to reach their highest levels since 2014 this summer⁹ a growing U.S. travel market, strong U.S. dollar and trends towards longer stays and higher spending represent excellent opportunities to encourage visitors to explore more of the Yukon.

THE INSIDE TRACK

The top trip anchors for potential visitors from the USA are natural attractions and aurora viewing. Close to half (44%) rank aurora viewing as an experience they would like to have. Just like Canada, medium to high-end lodge accommodation, front country day tours, multiday soft adventure programs in territorial and national parks, unique aurora viewing options and First Nations-themed products are all in demand.

¹ <https://www.thebalance.com/us-economic-outlook-3305669>

² CIBC FX Themes and Trades, January 2019

³ <https://travel.trade.gov/view/m-2018-O-001/index.html>

⁴ Destination Canada

⁵ Global Tourism Watch 2017

⁶ https://www.ustravel.org/sites/default/files/media_root/document/outlook-back-page.html

⁷ Global Tourism Watch 2017

⁸ Destination Canada

⁹ <https://www.narcity.com/news/canadian-gas-prices-are-set-to-dramatically-spike-this-year-and-heres-when-it-will-happen>



53M

DESTINATION CANADA HAS IDENTIFIED
A POTENTIAL MARKET OF 53 MILLION TRAVELLERS
KEEN TO VISIT CANADA

Engage our target travelers by providing inspiring content that resonates with them and helps them make a decision to travel to the Yukon.

Increase awareness of the Yukon as a desirable and dynamic destination in Canada and the USA, by:

- Increasing online visibility
- Increasing time-in-market with ad messages
- Developing strategies for partnerships & sponsorships with traditional and non-traditional partners

Broaden the Yukon's appeal as a visit-worthy destination, by:

- Building a responsive community
- Exploring Quebec specific marketing initiatives
- Highlight new or lesser-known activities/interests
- Developing an influencer strategy

Position Travel Yukon as the trusted expert on travelers' experiences within the Yukon, by:

- Becoming an online resource for potential travelers
- Implementing aspects of the content strategy

Achieve gains in the Yukon brand perception and/or favourability, by:

- Improving online conversions
- Encouraging positive word-of-mouth (WOM)
- Implementing aspects of the content strategy

- Develop and implement a measurement strategy and visual dashboard for all North America Consumer Marketing activities

2019-20 Key Objectives

NORTH AMERICA (CONSUMER)



International Markets



1.2 MILLION

GERMAN-SPEAKING EUROPE REMAINS THE YUKON'S LARGEST OVERSEAS MARKET. DESTINATION CANADA HAS IDENTIFIED AN 'IMMEDIATE POTENTIAL' MARKET (THOSE LIKELY TO TRAVEL WITHIN TWO YEARS) FOR THE YUKON OF 1.2 MILLION.

Photo credit: Peter Mather

German-Speaking Europe (Germany, Switzerland, Austria)

Despite the weakest economic growth in five years in 2018, Germany is still the economic engine of Europe. The German government recently lowered its 2019 economic growth forecast to 1%. Slower global economic growth and uncertainty around the impact of Brexit on the European Union are expected to impact the German economy during the coming year.¹ On the positive side, wage growth, low interest rates and fiscal measures to increase household disposable income will improve private consumption.² The Canadian dollar is forecast to strengthen against the Euro in 2019.

Germany is the second largest outbound travel market in the world (behind the U.S.). Preliminary data indicates the number of trips taken by Germans reached an all time high in 2018 with a total of 71 million trips.³ Germans toured for more than 1.7 billion days, an increase of 1.8% over 2017.⁴ Indicators suggest that travel demand will continue in 2019. The number of German visitors to Canada from January to November 2018 was 391,000, which was a year-on-year increase of 5%. The full year estimate is 399,000, an increase of 3% over 2017.⁵

Air seat capacity was forecast to grow by 2% in 2018. Icelandic WOW Air will launch new services between Reykjavick and Vancouver in 2019. Westjet will also launch new non-stop services from Calgary to Dublin, Paris and London Gatwick. Condor remains a highly important partner for the Yukon in the market and Air North reports positive progress has been made on their interline agreement with the German carrier, which will help to expand the season, particularly in winter, when the negotiations are finalized in the spring.

German-speaking Europe remains the Yukon's largest overseas market and from January to November, there was a 0.1% increase in visitor numbers.⁶ Direct charter service from Frankfurt, extended media coverage and partnerships such as Hannover Zoo all lead to higher destination awareness and desirability. Given these factors, the Yukon is well positioned to capitalize on emerging market trends.

INSIDE TRACK FOR 2019

Word-of-mouth, travel catalogues and advice from travel agents are the key sources of destination inspiration for German travellers. When it comes to booking, they are increasingly going online rather than face to face. However, travel agencies are still the most important channel. Price and quality are primary considerations. Interest in RV holidays is growing with 10% of Germans interested in travelling by motorhome in the future. Once at their destination, they want to 'feel' the atmosphere and immerse themselves in local life.⁷ High-end customers want a mix of traditional luxury travel products and new elements.

¹ Reuters

² OECD

³ ReiseAnalyse 2018

⁴ fvw.de 17 December 2018

⁵ Destination Canada

⁶ Statistics Canada Frontier Counts

⁷ ReiseAnalyse 2018



388,000

DESTINATION CANADA FORECASTS 2018 ARRIVALS TO INCREASE BY 4% TO 388,000 VISITORS.

Photo credit: Midnight Light Media

Australia

The Australian economy looks set to continue growing through 2019 with a forecast GDP of 3%. The OECD expects business investment to pick up and for moderate wage growth. However, there are some potential headwinds including a decline in housing prices which will impact already highly-leveraged households and an upcoming federal election that presents some uncertainty. Additionally, the continuing trade war between the U.S. and China along with weakening global growth (and particularly a slowing Chinese economy) negatively impacts the Australian dollar.¹

Outbound travel from Australia grew by 4.26% to 10.9 million trips in 2018. The USA remains the top long-haul destination, attracting over one million Australians annually.² Destination Canada forecasts 2018 Australian arrivals to end with increase by 4% to 388,000, while spending will increase by 6%. As of November, annual arrivals were at 311,000 which is down 8% over 2017.

Air capacity has been increasing over recent years and 2018 saw further capacity growth of 13%. Air Canada now services non-stop direct flights between Vancouver and the three Australian major cities: Sydney, Brisbane and Melbourne. Just over 60% of Australians enter Canada via the U.S., and with growth in seat capacity and strong airfare competition on U.S.- Australia routes, this looks set to continue. Airfares to Canada continue to be more expensive than the U.S. and, in some cases, Europe.

Australian travellers are looking for alternatives to busy, expensive tourist destinations, particularly those in Europe. Wilderness destinations are in demand but discerning consumers demand quality. Older travellers want to experience iconic Canadian experiences including wildlife encounters, while younger travellers prefer off-the-beaten-track experiences. Both groups seek authentic experiences that allow them to “live like a local” and get to know locals.

Canada continues to be a sought-after destination by Australian travellers. Destination Canada research identifies an immediate market potential for Canada of 2.67 million Australians.

Of these, Cultural Explorers aged 25 – 34 and Social Samplers over 55 represent the best immediate opportunity. Among travellers most likely to visit Canada, 8% indicate they are likely to visit the Yukon. Australians are more likely than the average visitor to arrive during (North America’s) the ski season and spring months, while maintaining their high interest in summer season as well. Cost and distance remain the key barriers to visiting Canada.

The top trip anchors for potential Australian travellers to Canada are natural attractions and aurora viewing. Bucket-list activities such as aurora viewing drive destination choices. Once this key activity is chosen, visitors will then add other experiential winter activities. An opportunity exists for the Yukon to not only leverage the desire for aurora viewing experiences, but to also develop a similar bucket-list item for summer/fall. Another key opportunity for this market are Eco Lodge and Glamping experiences.

Destination Canada will be focusing on Winter, Food & Wine and Authentic Canadian Experiences in the Australian market in 2019.



Photo credit: Peter Mather

THE INSIDE TRACK

Television remains the most influential medium with Australian travellers and one the Yukon is well-positioned to leverage as travel editors are increasingly seeking destinations that offer unique wildlife experiences, landscape, quirky festivals and soft adventures. Online media is also influential in this market. Australian consumers tend to learn about a destination and decide to visit because of a single bucket list travel experience. For the Yukon, this is the Northern Lights. Once the package is booked, the consumer will book associated experiential winter activities. A correlating series of summer experiences using the Midnight Sun and Fall Colours as the “hook” is necessary to grow Yukon destination-specific visitation from Australia. More lodge and “glamping” product development is also required to grow both the winter and summer seasons.

¹ CIBC

² http://www.afta.com.au/uploads/582/181220_december_afta-travel-trends-report_final.pdf



4.2 MILLION

CANADA'S IMMEDIATE POTENTIAL

SOURCE: STATISTICS CANADA,
2017 INTERNATIONAL TRAVEL SURVEY.

Photo credit: Ines Goovaerts

United Kingdom

The future of the British economy rests on the outcome of Brexit negotiations.¹ Brexit related uncertainties and declining household purchasing power continue to hold back economic growth. Private consumption and business investment have slowed markedly since 2016. Inflation continues to rise as the Pound falls, while unemployment is at historic lows and labor shortages have emerged. The British Pound will remain volatile until Brexit is resolved.²

Overall, outbound travel declined 1% year over year in 2018³, however international trips over 7 nights increased to the highest level since 2011.⁴ The U.K. is Canada's largest overseas market. Arrivals in 2018 were down 1% as of November, however the annual forecast is for an overall increase of 3% to 825,000 visitors. Air capacity continued to improve with a 3.0% increase in available seats.

The U.K. is still the world's 6th largest economy, and Britons value travelling a great deal. According to the Association of British Travel Agencies (ABTA) a key trend that emerged in 2018 was that of travellers preserving and investing in their longer overseas breaks by cutting back on shorter breaks. With a weakened Pound, value for money continues to be a priority. Forward bookings for 2019 are looking positive. Responsible tourism is also becoming a significant consideration for

consumers when planning a vacation and will be one of the key trends for 2019. As well, there is an increasing demand for personal, tailored and expert travel advice from trusted travel professionals.

Destination Canada estimates the potential market for Canada at 4.82 million, with the potential market for Northern Canada being just over half a million. Key potential clients are over 55's who have the time and money to travel, and younger travellers who are interested in discovering lesser known attractions and activities. The top trip anchor activities for potential visitors to Canada are natural attractions, northern lights and wildlife viewing.⁵

While Destination Canada research indicates that the primary barrier for potential travellers to Canada is a perception that it is too expensive, the Canadian dollar still offers substantial value against the Pound at a time when that is an important consideration.

The U.K. is the Yukon's third largest overseas market and one which enjoys very strong trade and media partner relationships as well as solid air access on one-stop routes via Vancouver and Calgary. From January to November 2018, visitor numbers to the Yukon were up 28.4%.

THE INSIDE TRACK

There is increasing product placement and interest for the Yukon, as well as positive media coverage, particularly of new and unique product. Travel trade indicate opportunities that the Yukon could leverage include expanded product inventory outside of Whitehorse, extended seasonality into late-September to capitalize on fall colours and more lodge products (such as the recent cabin additions to Northern Lights Resort and Spa and Southern Lakes Resort) to meet client needs. In addition, market-ready First Nations products can meet the growing trend for Indigenous cultural travel by Britons.

¹ OECD
² CIBC FX Themes and Trades
³ Office of National Statistics (Jan - Sep 2018 vs Jan - Sep 2017)
⁴ ABTA Travel Trends 2019
⁵ Global Tourism Watch 2017



#4

JAPAN IS THE YUKON'S FOURTH LARGEST INTERNATIONAL MARKET.

Photo credit: Peter Mather

Japan

Economic growth in Japan is projected to remain at around 1% in 2019. Business investment is growing, and private consumption is expected to pick up. In addition, government spending will increase as the 2020 Olympic Games in Tokyo draws near. Japan faces rapid population aging as well as a shrinking population which is likely to lead to labour market reform in coming years as some sectors face severe labour shortages.¹ The Japanese Yen is forecast to strengthen over coming months.²

The Japanese outbound travel market is expected to close the year at 19.1 million travellers, an increase of 1.1% over 2017.³ The number of Japanese visitors to Canada from January to November 2018 declined 18% to 235,000. However, the full year estimate is for growth of 3% to 314,000. Air capacity declined by 3% in 2018. A new departure tax is not expected to impact international travel and an increase in the consumer tax which may kick in October 2019 may have a negative impact heading into 2020.

There is a shift in the Japanese market towards more experiential and learning travel products. Non-traditional destinations have an opportunity to increase visitor numbers by providing attractive and unique experiences, while iconic destinations are encountering an over-tourism issue.

The use of artificial intelligence and virtual reality for marketing tourism products and booking is on the rise. The age of Japanese travellers will shift over coming years to a younger demographic as Baby Boomers reach their late seventies and scale back international travel. International cruise travel remains popular.

Spending remains to be much higher amongst Baby Boomers while younger demographic tend to be more price conscious. Whether it's the younger generation or Baby Boomers, the Japan market, like other markets, is also shifting more and more towards independent travel year after year.

Destination Canada estimates the potential market for Canada at 2.55 million, with the potential market for Northern Canada being 385,000. Two key market segments are Free Spirits 25 - 34 and Cultural History Buffs over 55 with both groups interested in experiencing uniquely Canadian attractions.

Advocacy plays a large role in destination selection and Canada is in a strong position relative to its competitors with respect to positive word of mouth. This is an opportunity which can be leveraged through strategies based on social media and other trusted sources such as travel review websites.⁴ Aligned with this is the trend towards 'destination fans' as influencers.

The top trip anchor activities for potential Japanese visitors are visiting natural attractions, historic sites and aurora viewing. Aurora viewing remains a core product with 45% of travellers ranking it as a preferred activity. However, only 14% of recent travellers to Canada participated in an aurora viewing experience. Another activity where there is high interest but low participation is exploring Aboriginal culture. The product must be more experiential due to a language barrier.

THE INSIDE TRACK

Aurora viewing is a highly competitive market and the Yukon's opportunity is to continue to differentiate the experience, particularly around summer / fall aurora viewing. And, with natural attractions and hiking in nature being the top two desired activities for Japanese travellers, the Yukon is in an ideal position to focus on summer outdoor and nature activities. As more Japanese consumers are becoming aware of the Yukon as a travel destination, tour operators are taking notice, not only in aurora viewing but also non-aurora products. A resort-style product development and a "downtown" aurora-hotel would be great accommodation additions for the Yukon to continue to grow the Japanese market.⁵

¹ OECD

² CIBC FX Themes and Trades January 2019

³ Japan Travel Bureau

⁴ Global Tourism Watch 2015

⁵ Statistics Canada January to November Frontier Counts

Benelux (Belgium, Netherlands, Luxembourg)

Growth in the Dutch economy is moderating but still robust with favourable financial conditions supporting both private consumption and investment growth. Global trade tensions and impacts of Brexit on the European Union represent downside risks. Unemployment remains low and there is a shift away from the recent trend of self-employment.¹ In January 2019, Statistics Netherlands reported the biggest drop in consumer confidence in over seven years.² The Canadian dollar is forecast to strengthen against the Euro through 2019.

Long-haul vacation spending by the Dutch is lower than German-speaking Europe or the U.K., but they tend to stay a long time (on average 18 to 21 days). For trip planning and destination choice, user-generated content is important and when it comes to purchase, Booking.com is the primary resource for self-service travellers. Specialist travel companies still have an important role to play as travel experts, particularly for long-haul trips.

Long-haul travel in some segments of the population has increased since 2017 including the Baby Boomers (5%), Generation X (6%), Millennials (9%) and Digital Natives (5%).

Sustainability has moved beyond merely being a trend to become an integral part of the buying decision. Travellers will consider environmental and sustainability issues when choosing where and how to travel: they want to know the impact of travel companies on the local people, national environmental policies and so on. They like to do good and feel good, have an attitude of 'self-optimization' and enjoy understanding local rules and cultures.

The Netherlands, while not a large market, has been a consistent performer for the Yukon. Efforts to grow the amount of Yukon products carried in the market have been paying off with a considerable increase in new product being offered by key accounts. In addition, the Yukon enjoys good one-stop air access to the Yukon via Edmonton, Calgary and Vancouver. In-market sales representation has also led to new promotional opportunities with the trade and media.

The industry organized Canada Marketing Committee, in which Tourism Yukon participates, develops promotional initiatives and partnership opportunities that include hosting a consumer travel website www.youcanada.nl and sponsoring marketplace events.

THE INSIDE TRACK

Dutch travellers enjoy off the beaten track travel — they want authentic, personal experiences and see themselves as travellers, not tourists. If choosing between a popular tourist destination and one that is similar but less well-known, they will choose the latter. This is an opportunity for the Yukon which has been tagged the “New Alaska” by some operators. Another key trend for this market is the micro adventure – short 1 to 3 day adventures within a longer itinerary.

¹ OECD

² <https://www.cbs.nl/en-gb/news/2019/04/largest-drop-in-consumer-confidence-in-over-7-years>



18 TO 21 DAYS

AVERAGE LENGTH OF VACATION FOR DUTCH TRAVELLERS.



569,000

NUMBER OF POTENTIAL TRAVELLERS TO
NORTHERN CANADA FROM FRANCE.

Photo credit: Rhonda Krause

France

At the start of 2019, the French economy is on a downward trend raising concerns for the Eurozone's second largest economy. Politically France is in turmoil, seen most notably with the "yellow vest" protests across the country. Macron's approval rating has plummeted to all-time lows and despite some concessions, which will significantly impact the French budget, the protests continue. The Canadian dollar is expected to strengthen against the Euro in 2019.

As of November 2018, French arrivals in Canada were up 6% to 563,000, with a full year forecast of 590,000, an increase of 3%. Air capacity is expected to close the year with a 12% increase. New air services will commence in 2019 with Air Canada launching direct flights from Paris to Vancouver and Westjet from Paris to Calgary. Both will offer one-stop service to Whitehorse during the summer season.

USA and Canada are the most aspired to and intended long-haul destinations among French travellers.⁴ Canada, however, suffers a challenge with conversion.

Part of this may be due to the fact that French travellers perceive Canada and the U.S. as having price parity while also stating that the biggest barrier to visiting Canada is that it is too expensive.¹ This suggests that they don't see Canada as offering a unique value proposition when compared to the U.S. With the continued exchange rate gap between the USD and CAD, an opportunity exists to grow awareness of Canada's value and unique attributes.

Destination Canada estimates the immediate market potential for Canada as 4.16 million, with potential for northern Canada at 569,000. Travel intentions among French travellers continue to trend down with the number saying they will spend less on long-haul travel exceeding those who will increase their spending.

Key potential markets are Cultural Explorers 25 - 44 and Cultural History Buffs 45 - 64. These groups want to experience distinctively Canadian culture, people and cuisine as well as uncover hidden gems that will make their Canada vacation unique. The top trip anchor activities for potential visitors to Canada are Aboriginal culture and traditions, exploring places most tourists won't go and historic sites.²

2018 saw a 10% increase in French visitors to the Yukon.³ French language services at the supplier level, an excellent relationship with L'Association Franco-Yukonnaise, enhanced air access through Vancouver, and strong in-market support from Destination Canada all enhance the Yukon's potential in this market.

THE INSIDE TRACK

Tourism Yukon collaborates with Association Franco-Yukonnaise (AFY) to implement a modest marketing program in France. AFY, in turn, partners with Destination Canada-France to deliver on its channel-specific marketing activities and works with RTO's in Canada active in France. Wilderness exploration, self-drives, small group guided tours, First Nations-themed products and homestays are all of keen interest to French travellers to the Yukon.

¹ Global Tourism Watch 2017

² Global Tourism Watch 2017

³ Statistics Canada Jan - Nov 2018

⁴ Tourism Australia



10.9 MILLION

IMMEDIATE MARKET POTENTIAL FOR CANADA

SOURCE: STATISTICS CANADA,
2017 INTERNATIONAL TRAVEL SURVEY.

Photo credit: Government of Yukon

China

In 2018 the Chinese economy grew at its slowest pace in three decades. Factors impacting the economy are the Chinese government efforts to rein in high debt to create stability and the trade war with the U.S. Growth is forecast to continue declining in 2019 with a GDP of 6.2% and consumption remaining the key economic driver. The Chinese Yuan is expected to strengthen over coming months.¹ Diplomatic tensions between China and Canada are heating up, with the Chinese government issuing a travel warning for Chinese citizens against Canada. This is slowing the outbound flow of visitors to Canada from China and some destinations that are reliant on the larger Approved Destination Status group tours, are reporting significant reductions in the numbers of China visitors.

China remained the largest source of outbound tourists globally, with total outbound departures in 2018 expected to pass the forecast 154 million to reach 162 million. Of this number, around 84 million travel beyond Hong Kong and Macau.² The China Outbound Tourism Research Institute predicts that the outbound market will reach a staggering 400 million by 2030. Outside of Asia, the U.S. is the most popular destination. Within China, the largest regional markets are Shanghai, Beijing, Guangzhou (the trade calls it Tier 1 cities)

and Shenzhen, however with more direct air routes and better visa accessibility the number of outbound travellers from second-tier cities is growing rapidly.

China is Canada's third largest market in terms of arrivals (behind the U.S. and U.K.) and the second largest market in terms of tourist receipts. Destination Canada forecasts an increase of 13% in the number of visitors from China to 766,000 in 2018 – a new record. From January to November 2018, a total of 695,000 Chinese had visited Canada, an increase of 9% year-over-year.

High end tourists, comprising 20% of the outbound market and 80% of outbound travel spending, seek experiential travel products. The demand for personalized trips is also growing with the number of people taking part in private groups growing by 177%. Family travel is also becoming increasingly popular as a result of the two-child policy.

Destination Canada has identified an immediate market potential of 10.9 million for Canada and 1.3 million for Canada's North.³ Key market segments are Aspiring Escapists and Free Spirits 35 – 44. The former prefer all-inclusive experiences that connect them to lesser known experiences and destinations, while the latter enjoy luxurious, iconic and niche experiences that are 'brag-worthy'.

The top trip anchors among potential Chinese visitors to Canada include natural attractions, historic sites and wildlife viewing. Although 35% of potential travellers express interest in aurora viewing, only 14% of recent visitors to Canada actually undertook an aurora viewing experience.⁴

In 2018, Canada opened seven new visa processing centers bringing the total number to 12, covering the most densely populated areas of China, making it highly convenient for Chinese visitors to apply for a Canadian visa.

China is now the Yukon's fourth largest international market. Clearly, aurora viewing represents an excellent opportunity for the Yukon and there has been increasing interest from the travel trade in publishing Yukon aurora viewing programs. In fact, in 2018, some tour operators started offering aurora viewing combining both Yellowknife and the Yukon.



Photo credit: Robert Postman

THE INSIDE TRACK

The China Tourism Academy has noted that as air pollution in China has become more serious, air quality and the natural environment have become important factors in destination choice. These, along with the growing trend towards FIT travel, especially self-drive/RV and off-the-beaten-track destinations are opportunities that the Yukon can leverage. Some tour operators have also indicated that they are going to offer summer / fall aurora viewing season to travel to Yukon, the reason is this time they also could view aurora, to avoid the competition with Yellowknife which tends to be focused exclusively on winter.

¹ CIBC FX Themes and Trades January 2019

² http://news.travel168.net/focus_on/20181218/50069.html

³ Global Tourism Watch 2017

⁴ Global Tourism Watch 2017

South Korea

The OECD expects economic growth in South Korea to remain close to 3% through to 2020. Employment growth has slowed due to significant increases in the minimum wage, one element in the government's income-led growth strategy, which also includes higher public employment and social spending. South Korea is facing the fastest rate of aging population among OECD countries. An improved relationship with North Korea may bring economic benefits but it is yet to be seen what kind of impact it can generate. The Korean Won is expected to strengthen over the medium term.¹

Outbound travel from South Korea grew by 8.3% in 2018 to 28.7 million departures.² The number of Korean visitors to Canada from January to November 2018 fell by 14% to 232,000, however the full year forecast is for an increase of 5% to 299,000. Air capacity has declined less than one percent from 2017 levels.

With recent changes to working hours law, Koreans are gaining more leisure time. The younger generation is already taking more short trips abroad and a proliferation of low cost carriers in the region is making these trips more affordable. The FIT market continues to grow thanks in part to the high Internet penetration rate which allows travellers to access more sources of information and inspiration.³ Three quarters of all travellers consult a travel agent or tour operator for a long-haul trip.

Destination Canada has identified an immediate market potential of 1.6 million for Canada's North which represents one in five potential visitors – the highest rate of all Canada's key markets. The length of the flight and cost remain the most significant barriers to travel for this market.

The top trip anchor activities for potential Korean visitors to Canada are visiting natural attractions, historic sites, culinary tours and hiking. While nearly one third of potential travellers express an interest in experiencing aurora viewing, only 13% of past travellers actually did.

The Yukon saw a 12.4% decline in visitor numbers from South Korea from January to November 2018.⁴ However, interest among both the travel trade and consumers is improving, particularly for aurora viewing. South Korea also has one of the most developed and active social media populations globally and the highest use in Asia which presents an excellent opportunity for the Yukon to reach potential customers. Online sources including information from search engines and travel blogs (including Instagram) prepared particularly by influencers are highly influential in destination choice, followed by word of mouth.⁵

THE INSIDE TRACK

Travel trade is an important channel for Tourism Yukon as they are both an influencer and business partner to increase visitation, introduce new products and to gauge market sentiment. Winter aurora viewing and summer hiking tours remain Yukon's core products in South Korea. Other growth opportunities are self-drives and summer soft adventure.

¹ CIBC FX Themes and Trades January 2019

² Korean Tourism Organization

³ Visit Britain Market Profile South Korea 2018

⁴ Statistics Canada January to November frontier counts

⁵ Visit Britain Market Profile South Korea 2018



Mexico

With the election of a new President and the newly signed USMCA agreement, Mexico has an improved economic and political certainty. Household spending remains strong, unemployment is low and business investment, which has been persistently low, will strengthen.¹ A strong U.S. economy is expected to support growth in the coming years. GDP growth in 2019 is projected to be around 2.1%. Despite some depreciation pressures, the Peso is forecast to remain steady against the Canadian dollar through the year.

Outbound travel from Mexico has been on the rise since 2011 but most of it is short-haul with 90% going to the U.S. Long-haul travel declined sharply from 2011 to 2013 but has started to trend upwards again since 2014. Mexico is one of the fastest growing areas in Latin America and although it faces economic challenges, the travel market is expected to grow and mature.

Since December 2016, when the visa requirement was lifted, the market has been growing rapidly. From January to November 2018 arrivals grew by 11% to 363,000. Destination Canada forecast annual visitor numbers to be 433,000, an increase of 19% over 2017. This means Mexico will overtake Australia as Canada's fifth largest overseas market. Air seat capacity increased by 37% in 2018, in spite of WestJet cancelling its Mexico City to Vancouver flight. Compression concerns were eased by the introduction of InterJet's service between these cities.

The Yukon too has seen positive growth in Mexican arrivals with a January to November year-on-year growth rate of 21%.² Canada is a top-of-mind destination for Mexican long-haul travellers and is ranked third behind the U.S. and Spain of all long-haul destinations being seriously considered in the next two years.³ With nine out of ten outbound travellers heading to the U.S., Canada's challenge is to find ways to differentiate itself as a destination.

THE INSIDE TRACK

Mexican travellers have an overwhelming appreciation of Canada's nature, a key point of difference with the US. Mexicans are more likely to engage in outdoor and/or active nature-based pursuits in Canada and are also interested in niche activities such as Aboriginal culture and northern lights. The Yukon is in an excellent position to take advantage of all these factors.

While direct bookings are becoming more common from the Mexican market, the largest volume of travelers are still coming via trade networks. Several Mexican tour operators report that Mexican guests can be very price-conscious during the purchase phase, but are then interested in 'adding extras' once in the destination; this may provide a product/pricing strategy of benefit to Yukon suppliers. Most Mexican tour operators prefer single point sales systems; using RTO's or booking complete tours from individual suppliers, rather than building packages based on multiple suppliers.

¹ OECD

² Statistics Canada Frontier Counts

³ Global Tourism Watch 2017



21%

INCREASE IN YEAR OVER YEAR VISITATION FROM MEXICO TO THE YUKON FROM JAN - NOV. 2018



Photo credit: Peter Mather

Brazil

The Brazilian economy is expected to gain further momentum in 2019 with increasing household spending and business investment. The labor market continues to tighten and GDP is forecast to grow by 2.1%. Although the country has a new administration which is expected to bring some political security, there are uncertainties over the implementation of reforms which may interfere with the recovery.¹ The Brazilian Real is forecast to remain steady over the coming year.

From January to November 2018, visitor numbers to Canada grew year on year by a healthy 42% to 179,000 arrivals. This can most likely be attributed to changes in visa requirements in 2017 and the improving Brazilian economy.

The market for the Yukon has primarily been aurora viewing and visitors are generally including it as part of a longer Canada trip. Language is a key challenge with Portuguese services being very limited in the Yukon. Given Destination Canada's decision to discontinue its marketing program in Brazil, Tourism Yukon's efforts in the market are limited to monitoring activities and responding to direct inquiries.

THE INSIDE TRACK

Brazilian travelers continue to find, book and enjoy the Yukon, despite reduced marketing efforts by Destination Canada. Primarily enticed by northern lights viewing offers, the Brazilian market currently visits mostly during the winter season. Some tour operators and RTO's continue to provide the Brazilian market with Yukon packages and tour options and those who do report relatively steady sales. Language specific

requirements can be problematic as Brazilian Portuguese is much less frequently encountered/offered than Spanish; however English services can be well accepted. Families (6-12 pax), often multi-generational, represent a good market for Yukon suppliers.

¹OECD

Engage our target audiences through strategic account management and effective communication to inspire them to continue their engagement with the Yukon, and motivate consumers to move further down the path to purchase.

Increase awareness of the Yukon as a desirable and dynamic destination in the Americas, Europe/UK and Asia/Pacific markets by:

- Increasing the number of Yukon tourism products and experiences being carried by tour operators
- Supporting tour operator sales efforts
- Facilitating strategic media relations and PR initiatives
- Developing strategies for partnerships with traditional and non-traditional partners.

- Develop and begin implement a Travel Trade Account Strategy across all markets

- Participate in the development and implementing of an updated Market Portfolio Assessment (MPA)

- Utilize the CRM to enhance business to business initiatives

Contribute to branch-wide efforts to support the development of products/experiences within Yukon's offering by:

- Sharing market intelligence
- Providing product and experience development and support to Yukon businesses

2019-20 Key Objectives

INTERNATIONAL MARKETS

2019–20 Global Marketing

ACTIVITIES CALENDAR

	2019									2020		
	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR
NORTH AMERICA												
Consumer												
DESTINATION YUKON CAMPAIGN												
TV (Canada-only)												
Online Video												
Display												
ALWAYS ON												
Search												
Adwords												
E-News												
Social Media												
Travelyukon.com												
Vacation Planner												
Consumer Shows (Support)												
Media and Influencer Relations												
Media and Influencer Press Trips												
Go Media												
TMAC – Media Marketplace												
SATW – Media Marketplace												
Media Event – Vancouver/Seattle												
Media Event– Toronto												
IMM New York – Media Marketplace												

2019–20 Global Marketing

ACTIVITIES CALENDAR

	2019									2020		
	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR
INTERNATIONAL												
Trade Relations												
RTO Agent training / product updates												
Mexico – Focus Canada (tentative pending DC)												
Travel Trade Familiarization Tours												
Sales Agent Training												
Co-operative Marketing Campaigns												
EUROPE / UK												
Consumer / PR												
GSE – Hannover Zoo event												
GSE – Condor in-flight video (tentative)												
GSE – Destination Canada media event												
GSE – Tour Operator B2C events												
UK – Yukon Assignment film screenings												
UK – Author's tour (tentative)												
UK – Destination Canada media event (tentative)												
UK – Tour Operator B2C events												
Netherlands USA Canada Reisburs												
Trade												
GSE – sales trip												
GSE – DC CSP webinar												
GSE – ITB Berlin												
UK – Destination Canada CSP event												
UK – World Travel Market												
UK – Destination Canada tour op event												
UK – Trade advertising feature (Selling Canada)												
Netherlands – Canada Experience												
GSE / UK / Benelux – agent training												
France – Top Resa & sales calls												
Co-operative Marketing Campaigns												

2019–20 Global Marketing

ACTIVITIES CALENDAR

	2019												2020		
	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR			
EUROPE / UK															
Press Trips and Travel Trade Familiarization Tours															
GSE – trade															
GSE – media															
UK – media															
UK – trade															
Benelux media															
Benelux trade															
France – influencer fam / media TBC															
ASIA PACIFIC															
Consumer															
Mont-bell destination seminars – Japan															
Trade															
China – Showcase Asia – China (Hong Kong?)															
Japan – Focus Canada Japan – Japan															
Japan – sales calls (with Yukon suppliers)															
CITAP – Vancouver															
Japan sales calls & meeting with Mont-bell															
Co-operative Marketing Campaigns															
Press Trips and Travel Trade Familiarization Tours															
Aurora & Fall															
Summer (trade & media)															

2019–20 Global Marketing

ACTIVITIES CALENDAR

	2019									2020		
	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR
ASIA PACIFIC												
Special Events / PR												
Gold Rush 2												
GLOBAL INTITIAIVES												
Rendezvous Canada												
Go Media Marketplace												
Go Media – Post Event Familiarization Tours												
Trade.TravelYukon.com												
Media.TravelYukon.com												

THE TOURISM YUKON TEAM

DEDICATED TO DESTINATION MARKETING EXCELLENCE,
WITH HEART, OUR MARKETING PROGRAM IS IMPLEMENTED BY A
TEAM OF PASSIONATE YUKONERS AND EXCEPTIONAL MARKETERS,
WHO LOVE THEIR HOME AND SHARING IT WITH THE WORLD.

NORTH AMERICA CONSUMER

Jason Marcotte, Marketing Manager, North America, Consumer

Jennifer Glyka, Marketing Specialist, Media and Influencer Relations

Moriah MacMillan, Marketing Specialist, Global Content

Annie-Claude Dupuis, Digital Marketing Strategist

Michelle Weiser, Marketing Specialist, Digital Consumer Engagement

Emilie Joslin, Digital Marketing Specialist

INTERNATIONAL

Jessica Ruffen, Market Development Manager — Europe/UK

Yas Yamamoto, Market Development Manager — Asia Pacific

Stephen Reynolds, Marketing Specialist, Americas,
Developing Markets, RTO's

GLOBAL MARKETING OPERATIONS

Michelle Williams, Marketing Coordinator

Robin Anderson, Global Marketing Manager

INTERNATIONAL SALES AGENTS

German-Speaking Europe — Holger Bergold - Bergold Promotions

United Kingdom — Lisa Chamberlain, Della Tully, Jo Thomas -
LC Marketing

Benelux — Karin Gomes - ITN Marketing

Japan — Yuka Takahashi

Australia — Sean Lane, Ray Lane, Nathan McLoughlin

China — Mavis Zheng, Jenny Guan - Sino Media

