



# Gay and Lesbian Travel in the Yukon Territory Executive Summary

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## *Methodology*

Community Marketing, Inc. (CMI) conducted online market research for the Gay and Lesbian Alliance of Yukon (GALA) in November and December 2005. The goal for this study was to survey consumers regarding their travel habits and motivators, and to provide data and analysis that will assist in marketing the Yukon Territory to the gay and lesbian market. Survey data will also serve as a baseline to measure changes in attitudes and tourism levels. 1,935 valid surveys were returned. 880 respondents (45%) indicated that they were at least somewhat likely to visit the Yukon in the next five years.

In addition, a focus group of potential visitors was held in San Francisco in May 2006. The group discussed perceptions of Yukon and provided feedback on a number of images that could be used in marketing the destination.

It should be kept in mind that the findings derive from those identifying openly as gay and subscribing to a gay media or CMI's research list. The results should not necessarily be extrapolated to the entire gay and lesbian population, however these findings do provide guidance regarding the perceptions and opinions of "out" gay travelers.

Based on national population figures, the American gay and lesbian community represents a US \$65 billion travel market, extrapolated as a very conservative 5% of the annual \$1.3 trillion US travel industry as stated by the Travel Industry Association of America. But considering the results of CMI surveys, gay and lesbian travel and tourism represent a far larger percentage of the overall travel market based on frequency.

**Gay and Lesbian Travel in the Yukon Territory ♦ Executive Summary ♦ August 2006*****Strengths***

Canada was the Number One international destination visited by gay and lesbian Americans in 2005 as reported in Community Marketing's 10<sup>th</sup> Annual LGBT Community Survey of 3439 LGBT consumers. 36% of US respondents visited Canada, compared to 33% for Latin America and the Caribbean, and 29% for Europe. Canada moved to the top of gay and lesbian travelers' radar, at least in part because of the legalization of gay marriage in 2005. Only a handful of countries in the world grant gay men and lesbians the right to marry, and it speaks volumes about society's acceptance of gays and lesbians in those countries. Only the Netherlands, Belgium, and Spain also recognized gay marriages at the time of CMI's 10<sup>th</sup> Annual Survey. 75% of respondents in the 10<sup>th</sup> Annual LGBT Community Survey reported that the LGBT political climate, including gay marriage laws, influenced their choice of travel destinations.

Value, safety, gay-friendliness, access/location, interests, culture, history, etc., all readily part of a Yukon experience, rank highly among criteria that respondents would use to select a destination.

Gay men and lesbians tend to have more education and higher household incomes than the mainstream. (The median household income for Yukon survey respondents is US \$93,000, and 76% graduated from college.) In addition, a higher percentage of that income is considered discretionary (the amount of an individual's income available for spending after the essentials, such as food, clothing, and shelter, have been taken care of). Lesbians and gay men travel more frequently than heterosexuals, and many consider travel to be an integral part of their lifestyle.

74% of Yukon survey respondents said they at least occasionally visit destinations that are "off the beaten trail," with 24% reporting they actively seek those types of destinations out. The relatively strong interest in destinations like Iceland, Antarctica and Nunavut, where there would also be a strong perception of cold and ice, translates very well for Yukon.

Overall, gays and lesbians are very positive about visiting Yukon. Even though only 5% of respondents had previously visited Yukon, 46% said they are at least somewhat likely to visit Yukon in the next five years (indicating that they are open to the idea of visiting), with 6% reporting that they were very likely to visit in the next five years. A majority of respondents said they were especially interested in eco-tourism and/or the northern lights. Yukon would be among the first "adventure" destinations to market to gay men and lesbians. This first-to-market strategy is advantageous.

Likely visitors had chosen a vacation destination in the last year because of the availability of self-drive touring, wildlife and mountain vistas. In general, respondents indicate that the lure of adventure (57%) and romantic evenings (57%) would motivate them most to visit Yukon. Likely visitors (those who indicated that they were at least somewhat likely to visit Yukon in the next five years) were even more motivated than the full-field by adventure destinations (70% vs. 57%), and First Nations cultural experiences (23% vs. 18% of the full-field).

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Survey respondents showed a keen interest in viewing the Northern Lights (62%) and seeing wildlife (50%) when visiting Yukon. Scenery, wildlife, and unique attractions are top draws for Yukon as confirmed by focus group participants after seeing photos from the area.

*To capitalize on the positive images associated with Yukon, marketing needs to be visual. This includes print and internet-based communications. A slideshow of images online could be a powerful marketing tool.*

**Weaknesses**

54% of survey respondents are not interested in visiting the Yukon Territory. It's not for everyone; however, the fact that everyone isn't visiting makes the Yukon even more attractive to those who are interested.

Understanding how a destination is perceived, true or not, can be very valuable in building tourism. Some of the reasons travelers gave that contribute to their negativity about the destination are: it's a remote wilderness (67%), it's very cold (58%), it's dark most of the time (34%). Some were not even sure where Yukon is located geographically.

*An important component of promoting the Yukon Territory to gay and lesbian travelers is overcoming objections. Many potential guests are put off by perceptions that they believe to be true, and even those somewhat interested need more information to be comfortable enough to actually plan a trip. Spread the word that the average high temperature in Whitehorse is 70°F and that it gets 18+ hours of sunlight during the months of June and July. Concerns about remoteness can be addressed with facts such as the number of flights per day between Vancouver and Whitehorse. Perceptions about the Yukon always being cold with long dark winters and no urban life need to be addressed. Gay and lesbian visitors want an honest upfront answer as to what to expect and an itinerary that helps them make the best out of it.*

**Opportunities**

Affordability, safety and gay friendliness are the top criteria for selecting an "off the beaten path" destination. Canada's proximity to the US, along with its strong reputation for safety and gay friendliness make Yukon a near-perfect destination for gays and lesbians.

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Survey respondents spent a median of US \$2,070 on their most recent vacation of four or more nights, including airfare, lodging, food and attractions. 19% spent more than \$4,000. Although expenditures for travel may be high, the perception of value matters to gay and lesbian travelers. Almost three out of four respondents said that they are either “moderately influenced by costs, and may seek other options if the price is too high” or are “always on the lookout for good deals.” It is important that consumers are able to calculate the relative cost of all components of a vacation in order to show value. Though airfare and hotel costs may be higher for Yukon than for other destinations, access to the Territory’s free attractions such as scenery, Northern Lights, etc., may have a strong influence on LGBT travelers’ view of overall value.

52% of survey respondents indicated that they would want to stay in first class accommodations when visiting a destination like Yukon. These visitors are not interested in roughing it, but may be willing to pay top dollar for a luxury adventure including fine-dining, spas and personal guides. Aboriginal home stays (16%), tent camping (12%) and RV campgrounds (11%) appeal to much smaller segments of the market. Not every traveler interested in Yukon will be open to the idea of staying in anything but luxury accommodations, but these alternative accommodations also have a place. An important attribute for attracting and servicing the Yukon traveler will be customization.

85% of respondents have a valid passport and are ready to travel to international destinations immediately. Recent changes in immigration law, which will require a passport for travel between the US and Canada, make the readiness of the LGBT market optimal for Canada compared to other US groups who are much less likely to hold a valid passport. (Comparatively, 22% of Americans have a valid passport, as calculated by statistics available from the US Passport Office.)

Culture and history are at the top of respondents’ list for criteria by which they choose a particular destination. Art, education/learning, and adventure are also strong motivators. Interestingly, survey respondents’ criteria for choosing a destination in the future is inversely correlated with how they selected the destination in the past, indicating that they would like to seek out what they have yet to experience, which bodes well for Yukon, especially in the eco-tourism and adventure travel market segments. 57% of respondents stated they would consider eco-tourism options (rank #1), and 49% indicated that they would use adventure as a criterion for choosing a destination in the future.

Approximately two-thirds of respondents have taken a self-drive tour in the past, while just over half have traveled to see mountain vistas and 47% for wildlife. An outstanding 62% indicated interest in seeing the Northern Lights. Wellness tourism is of interest to 52% of respondents in planning a trip.

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9% of LGBT respondents surveyed are members of an LGBT outdoor club. LGBT outdoor clubs, such as the Gay and Lesbian Sierrans, represent a strong niche of individuals interested in hiking, nature and destinations like the Yukon Territory. Many of these organizations produce newsletters and offer excellent advertising rates to a highly focused demographic. Some even organize group activities for members on a regular basis.

*Advertise in outdoors-oriented media, such as Sierra Magazine and G&L Sierrans Newsletter, read by adventure seeking gay and lesbian consumers. Exhibit at trade shows such as the Outdoors Adventure Fair. It's impossible to advertise or visit every US city, but gay men tend to be concentrated in California, New York, Florida, and Texas urban areas, even more so than the mainstream population.*

### **Challenges**

Developing interest may take time. Participation in travel trade events such as gay travel expos, advertising in LGBT publications, direct mail, even taking this online survey, helps develop awareness of “new” destinations such as Yukon. These, plus editorial coverage in the LGBT press, are critical in keeping gay and lesbian travelers aware of what Yukon has to offer as a tourism destination.

Increasingly, destinations are becoming interested in gay and lesbian travelers. As more destinations put out the welcome mat to lesbians and gay men, more destination choices emerge. Yukon needs to establish and maintain a strong presence among destinations interested in gay and lesbian tourism.

Some may consider Yukon too similar to Alaska and British Columbia, which they have previously visited, as confirmed in the focus group. (47% of survey respondents had visited BC and 16% had taken an Alaska cruise. Comparatively only 5% had visited the Yukon.) Still, survey respondents who had previously visited Alaska were somewhat more likely to demonstrate interest in Yukon.

Aside from hiking, few respondents showed much aptitude for outdoor activities. 28% said they took advantage of day-hiking opportunities when traveling in the last year, 10% had been skiing, and 10% had been canoeing or kayaking in the last twelve months. However, 43% said day hiking opportunities or river rafting would interest them on future vacations. 40% would be interested in canoeing or kayaking, 32% in overnight backpacking or mountain biking, and 30% in dogsledding. While gays and lesbians may not have much experience, these physical activities could be leveraged as interesting components of a vacation.

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*Don't oversell the adventure aspect. While a significant 37% identify as adventurous, 63% of those likely to visit do not. The most significant reason given for interest in visiting Yukon is history, self-drive independence, learning about another culture, mountain vistas, wildlife and adventure.*

*Lesbians may be somewhat more likely to visit Yukon and should be included in the marketing plan, but don't count on a disproportionate response from this market. Because lesbians are more likely to live in suburban or rural areas, they can be harder to find than gay men, and therefore harder to market to. In addition they are three times more likely to have children living at home, limiting the types of leisure trips they can do, both financially and physically.*

Among unique attractions, respondents show great curiosity about the Northern Lights, and are curious about best viewing times and locations. Northern Lights viewing could be combined with a dog sledding outing and the warmth of a big fire in a comfortable lodge.

### ***Summary of Recommendations***

**1) Beauty:** To capitalize on the positive images associated with Yukon, marketing needs to be visual, this includes print and internet based communications. Focus group participants responded powerfully to the images shown at the focus group. A slideshow of images online could be a compelling marketing tool – especially if the photos are beyond what the viewer/potential visitor would expect to see in Yukon. Another way to treat images would be to have them enlarge when they are clicked on, giving web surfers a better view of the picture.

**2) Northern Lights:** One of the top unique attractions for travelers considering the North is the Aurora Borealis phenomenon. Develop independent (FIT) packages that make viewing this natural wonder easy for gays and lesbians to book. Include opportunities to interact with the locals and an optional dog sledding excursion in the package as well as air from gateways such as Vancouver. Offer accommodations at several price points at gay-friendly (TAG Approved) hotels and other accommodations.

**3) Play the Canada Card:** Play the Canada card and emphasize the gay-friendly and safe nature of Canada and Yukon. Research shows that gay and lesbians in the US really appreciate Canada. Though many gays and lesbians are traveling to Alaska, this “red state” is not particularly gay-friendly. In addition, the crowded ports of call that cruise ships visit in Alaska have been artificially prepared or “Disneyized” with high markup shops. So much of Alaska's draw, such as glaciers, wildlife and the gold rush is even more evident in the Yukon.

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**4) Confront the Obstacles:** An important component of promoting the Yukon Territory to gay and lesbian travelers is overcoming objections, and some of the biggest obstacles are perceptions of expense and weather by travelers. Many potential guests are put off by perceptions that they believe to be true, and even those somewhat interested need more information to be comfortable enough to actually plan a trip. Confront these perceptions truthfully and head on. Talk about how the major attractions of the destination and the scenic beauty are free, and how the actual per day cost of meals and lodging compare to other destinations, as well as how inexpensive a trip to Yukon can be compared to other “exotic” destinations. Spread the word that the average summer high temperature in Whitehorse is 70°F and that it gets 18+ hours of sunlight during the months of June and July. Concerns about remoteness can be addressed with facts such as the number of flights per day between Vancouver and Whitehorse.

**5) Press Relations:** Yukon should emphasize LGBT press including government sponsored press trips and news releases geared toward promoting Yukon as not only unique and exciting to visit, but among the most gay-welcoming places in the world. The gay and lesbian press is always looking for new angles, making Yukon very worthy of LGBT press. If not exotic, this destination is different to the average gay writer and publication. In addition, Yukon needs to include education about the destination so that travelers become more aware of all the things Yukon offers them. Education is difficult to accomplish in a display ad, where a story can really delve into specifics about what an experience in Yukon is like. Don’t ignore the mainstream travel press either; *Travel and Leisure*, *Conde Nast* and *National Geographic* all were read frequently by gays and lesbians according to CMI’s *10th Annual LGBT Community Survey*

**6) Internet and Yukon Website:** Gays and lesbians are connected to the Internet. 94% of respondents to CMI’s *10th Annual LGBT Travel Survey* said they used the internet to help plan their vacations, demonstrating the importance of an accurate and informative website that is easy for travelers to find and navigate. They use the internet both to book travel and to research destinations. A good website is an extremely important resource in providing them with necessary information they need to confirm a vacation. Be sure to coordinate the creative of the display ads with the creative of the website, so that the image presented is consistent. Furthermore, a government tourism office website has even more impact than one by a supplier or chamber of commerce. The “Tour Yukon” website should include LGBT information.

**7) Advertising:** 88% of US respondents in CMI’s *10th Annual LGBT Community Survey* indicated that advertising in gay and lesbian publications influences them. A continued presence in select travel magazines with display ads will continue to be important. It is important that advertising includes dramatic picturesque images and that it educate readers about common misperceptions about Yukon. Include targeted newsletters and membership lists of outdoor-oriented LGBT groups in your plans

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**8) Trade Shows:** Yukon should continue to show a presence in the LGBT community. It is important that gays and lesbians have an opportunity to meet Yukon representatives to learn more about the area and have questions answered. Yukon should continue its involvement in events such as gay travel expos and other similar events.

**9) Develop LGBT Tourism Allies:** LGBT Tour operators, such as Outwest Adventures, Toto Tours, and Alyson Adventures have well established relationships with gay customers. Often these companies have been the first to really open up a destination for gay tourism. Establishing relationships with them, including FAM trips, could give Yukon a big visibility boost to likely travelers.

**10) Market to Gay and Lesbian Couples over 35:** The reality is that the market most likely to visit Yukon is gay male and lesbian couples over 35. Adjust your marketing efforts and imagery to appeal to your most likely customer.

**11) Western US:** Develop awareness of Yukon as a lesbian and gay travel destination in the US, especially in the Western US. The highest percentage of gays and lesbians live in California and close proximity to Vancouver as a gateway to Whitehorse and the Yukon cuts down travel time.

**12) Don't oversell the adventure aspect.** The most significant reason given for interest in visiting Yukon is history, self-drive independence, learning about another culture, mountain vistas, wildlife and adventure. The idea of "adventure travel" can scare away many potential visitors, who don't see themselves as adventurous. It's appropriate to include a category of adventure travel among tour options, but don't put all your eggs in that one basket.

**13) Gay Friendly Hotels:** Make sure the accommodations you recommend are gay and lesbian friendly. Lesbians and gay men are sensitive to feeling welcome at a hotel, and confusion at the front desk about bed arrangements can be awkward and negatively impact an otherwise wonderful experience. TAG Approved properties must provide diversity and sensitivity training to their employees, and have non-discrimination policies that include "sexual orientation." Encourage properties to join TAG and IGLTA . Promote that you only use TAG Approved hotel properties in your communications.



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**14) Lesbians:** Lesbians may be somewhat more likely to visit the Yukon, and should be included in the marketing plan, but don't count on a disproportionate response from this market. Because lesbians are more likely to live in suburban or rural areas they can be harder to find than gay men, and therefore harder to market to. In addition they are three times more likely to have children living at home, limiting the types of leisure trips they can do, both financially and physically. Special care and attention should be placed in addressing the interests and motivations of lesbians, including images and specific attractions that would be of interest to them. Lesbians are three times as likely to be traveling with children as gay men, so it's important that family activities be well represented. It is also important to bear in mind that the lesbian segment of the market may be somewhat more price-sensitive than gay men.

**15) Fine Tuning:** A follow-up survey should be done in about 18 months to evaluate the changes in perceptions that marketing efforts have contributed, and to assist in development of the next tier of promotion to the LGBT community. In addition, a visitors survey or field surveys can be useful to assess visitor responses.