

Tourism Yukon: Marketing Plan 2015 - 2016



2015 – 2016 MARKETING PLAN

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01. STRATEGIC CONTEXT

Yukon offers its visitors diverse, exceptional tourism experiences in a safe environment, highlighted by warm northern hospitality, breathtaking scenery, natural phenomena, abundant wildlife, and rich cultural experiences.

Global economic factors including low oil prices have driven the Canadian dollar to its lowest point in more than a decade. A weaker Canadian dollar is good for the tourism industry in Yukon as Canadians are more likely to travel in Canada and international visitors will experience great value in the purchase of tourism products and services.

In the coming year, increased interest from the domestic market fueled by Yukon's largest ever investment in the domestic market through Yukon Now, exceptional air access, growing interest in aurora viewing in the fall and winter, recovery of the U.S. economy and an enhanced and expanded investment in overseas marketing should result in modest growth in visitation in 2015.

The 2015-2016 Marketing Plan builds on the foundation of previous years' plans, while recognizing the impact that global events like economic recessions and volatile financial, fuel and stock markets have on our tourism performance and revenues. Events such as these provide the incentive to collectively be more strategic, more adaptable, more efficient and more integrated in the development, implementation and evaluation of all our marketing, industry services and visitor services programs.

About the Marketing Plan

The anticipated outcome from our marketing investments is sustainable growth in tourism revenues for Yukon businesses. Our strategic approach takes into account Yukon's existing capacity of product, experiences and infrastructure, and for the most part, focuses on markets that have traditionally produced longer-stay, higher-spending visitors that provide the highest return on investment for Yukon.

At the heart of our approach is the consistent deployment of Yukon's Larger than Life tourism brand in a way that builds intimacy and a powerful personal relationship with the Yukon tourism experience. Our marketing messages and investments create a sense of urgency to visit Yukon.

In 2013, Tourism Yukon enriched its investment in Destination Canada's (formerly the CTC) Explorer Quotient® (EQ®) by identifying Yukon's best customers defined by EQ segment, further refining these customers by the things they like to do most when travelling utilizing PrizmC2 clusters; and finally by conducting a research project to identify our best customers in Canada and where they live, down to their postal codes.

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Starting in 2014, we began leveraging this rich segmentation data to enhance the reach, effectiveness and efficiency of our marketing investments in Canada. 2015 will see us further utilizing segmentation data to help us to inform our marketing investments in the Canadian market.

While this is an annual Marketing Plan, it identifies Strategic Priorities that in many cases require a multi-year commitment to achieve. These Strategic Priorities have been developed with consideration of the priorities of Yukon's tourism industry as identified by the Tourism Marketing Committee (TMC) of the Tourism Industry Association of Yukon (TIAY), and through day-to-day interactions with Yukon tourism operators and industry stakeholders.

The 2015-2016 Marketing Plan outlines these strategic priorities that will be addressed through the strategies outlined in the Marketing Plan in the coming year to achieve Tourism Yukon's overall goal of generating economic growth through increasing visitation, maximizing visitor expenditures and supporting the development and enhancement of visitor experiences..

The Marketing Budget for the past five years included in the Plan provides a snapshot of Tourism Yukon's relative investments in its target markets. Each year, informed by the findings of a Marketing Program Assessment, Tourism Yukon reviews investments in its target geo-markets, which have an impact on the programs, initiatives, partnerships and activity carried on in each market.

In 2015-16, Tourism Yukon will implement year two of the Yukon NOW program. Jointly funded by the Yukon and Federal governments, the Yukon NOW program will see an additional 3.6 million dollars (1.8 million dollars annually) to raise the level of awareness of the Yukon as a compelling travel destination within the Canadian market, with some additional resources focused on media relations within the US market and in Europe and Asia.

Yukon Now represents Yukon's single greatest tourism investment in our history and is already providing return on investment in the form of engagement on TravelYukon.com, our social media channels and most importantly, for Yukon tourism businesses who have reported sales directly resulting from the campaigns. 2015-16 will see a continued investment in initiatives such as the development of four new summer-focused television commercials, the deployment of the Destination Yukon winter and summer campaigns, content acquisition, user-generated content, digital storytelling and post-campaign research.

The Marketing Plan is built from research and experience and leverages collaboration, partnership and investments with Yukon's tourism industry to ensure that we keep

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pace with global competition, while maximizing the efficiency, effectiveness and return from our marketing investments.

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02. OUR APPROACH

Tourism Yukon's marketing framework takes a channel marketing approach: consumer; travel trade; media relations and public relations (PR); and meetings, incentives, conventions and events (MICE) and sport tourism.

Consumer

Tourism Yukon's marketing efforts that reach consumers both online and offline are designed to increase awareness of Yukon as a travel destination, build a desirable image of Yukon, and drive the purchase of Yukon tourism products and experiences.

Consumer marketing activities are focused on specific, targeted market segments – primarily within the North American market. The key focus of our consumer marketing initiatives is to drive potential visitors along the path to purchase.

Tourism Yukon utilizes a variety of communication vehicles that target consumers including:

- Advertising (digital, print, out-of-home and broadcast)
- Digital marketing (website search engine optimization, e-marketing, pay-per-click)
- Social media
- Direct marketing – list purchase, re-contact
- Consumer shows
- Partnerships and co-operative marketing

Travel Trade

The travel trade channel is critically important to Tourism Yukon, particularly in the overseas markets where direct-to-consumer marketing is not affordable or efficient. Many international visitors to Yukon choose to book their vacation through a tour operator or travel agency who package and promote Yukon tourism products and experiences. Tourism Yukon leverages the relationship that our travel trade partners have with their clients and sales networks in-market.

Our investment in the travel trade channel varies depending on market, but generally includes the following activities:

- Attending key travel trade marketplaces to meet with key accounts and identifying potential new travel trade partners
- Providing up-to-date product and planning information
- Encouraging the travel trade to carry and promote Yukon products and experiences

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- Conducting familiarization (FAM) tours for product managers and sales agents to increase their awareness, packaging and sales of Yukon travel experiences
- Developing strategic co-operative marketing partnerships and promotions to enhance destination awareness and generate sales (i.e. supporting consumer-focused marketing initiatives)

Media Relations and Public Relations

Tourism Yukon develops and delivers a number of strategic Media Relations and Public Relations (PR) initiatives that have a positive impact on the generation of unpaid media coverage from Canada, the U.S. and international markets.

Our investment in the media relations and PR channel varies depending on market, but generally includes the following activities:

- Hosting travel media familiarization (FAM) tours to Yukon for media who have been commissioned to write or produce stories on Yukon travel experiences
- Attending media marketplaces to recruit travel journalists for future stories on Yukon travel experiences
- Building and maintaining relationships with key travel media
- Working with Yukon industry suppliers to promote their products and experiences in a manner that is relevant to travel media
- Integrating media and PR activities into relevant and appropriate Tourism Yukon marketing initiatives
- Exploring, evaluating and potentially hosting or participating in strategic media/PR events

Meetings, Incentives, Conventions and Events (MICE) and Sport Tourism

Tourism Yukon will continue to partner with the Yukon Convention Bureau (YCB), which will implement a marketing plan designed to promote Yukon as a MICE destination. As well, Tourism Yukon will continue to partner with Sport Yukon to support the organization's sport tourism marketing efforts targeted towards national, regional and local sports organizations and stakeholders.

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03. MARKET CLASSIFICATION

Tourism Yukon assesses the potential and performance of all of its geo-markets on an annual basis, taking into account a number of factors, including: border crossings, air arrivals, data from the International Travel Survey, Destination Canada's Market Portfolio Index, Yukon Visitor Tracking Program, visitor intercepts, reports from travel trade partners and market performance intelligence provided by Yukon tourism operators.

Since 2009, Tourism Yukon has utilized a Market Assessment Model that analyzes each target market based on a number of criteria that are fed by the various sources of intelligence listed above. In 2012, Tourism Yukon implemented its own proprietary Marketing Program Assessment (MPA) to assess the opportunity for growth and to guide investments being made in each of Yukon's 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.

Tourism Yukon classifies geo-markets as Primary, Secondary, Emerging and Monitor. Investments, activities and support for each market will be driven by these classifications, with some flexibility to respond to strategic opportunities when they arise.

Primary

Channels: Consumer, Trade, Media Relations/PR, and MICE (Canada-only)

- Canada
- United States
- German-speaking Europe (Germany, Switzerland and Austria)

Secondary

Channels: Trade, Media Relations/PR, and (some) Consumer

- Australia
- United Kingdom
- Japan

Emerging

Channels: Media Relations/PR, Trade, (some) Consumer

- Netherlands (Benelux)
- France

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- China

Monitor

Channels: Responsive to Trade, Media Relations/PR, with some in-market activity (such as trade show attendance, sales calls, consumer promotions, etc.) when key indicators suggest an increase in activity is warranted.

- Brazil
- South Korea*
- Mexico*

*Note: Improved market conditions, increasing trade interest and increasing visitation from these markets has resulted in an enhancement of our marketing activities in these geo-markets in 2015-16.

04. STRATEGIC PRIORITIES 2015-2016

- 1) Develop and deliver an integrated consumer marketing campaign, including broadcast media (television) in Canada through the Yukon NOW program
- 2) Enhance engagement and activities with receptive tour operators in Canada
- 3) Develop and begin to implement an entry strategy for the China market
- 4) Develop and begin to implement a Content Strategy

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06. PRIMARY MARKETS

CANADA

Market Classification

Tourism Yukon's Marketing Program Assessment (MPA) highlights a significant increase in share of market by Canadians compared to 2007 data. Visitors from Canada spend more and stay longer than visitors from the USA. The opportunity index suggests we could be investing more in the domestic market. The Yukon NOW program will increase our domestic marketing investment by approximately \$1.5 million per year for the next two years.

Market Outlook

- Due to the U.S. Congress recently committing to three more years of funding for Brand USA, competition for attracting Canadian visitors remains high. This steady competition from the south will require the Yukon to be efficient with resources that are limited in comparison to Brand USA. Tactics such as targeted niche digital marketing will be a priority in order to maintain top-of-mind awareness and encourage immediate planning and booking.
- Leveraging the flourishing youth travel market is currently a dominating prospect for the Yukon's Canada market outlook. With Destination Canada engaged in implementing a multi-year 'Canadian Youth Travel Movement' plan designed to increase youth travel surrounding Canada's 150th anniversary in 2017, the Yukon is provided with a strong growth opportunity to leverage over the next couple of years.
- In 2014, Canada continued to see an increase in tourism spending by Canadians at home, with a consistent quarterly growth of 0.5% over the last three years. Tourism GDP also continues in an upward trend that began in the third quarter of 2009, with a 0.7% increase in the third quarter of 2014. While the number of domestic trips decreased 1.3% in the second quarter from the same quarter in 2013, total expenditures actually increased 9.7%. For the Yukon, which is primarily a long-haul destination requiring a higher than average trip spend, this outlook offers confidence in the Canadian market in terms of increasing overall visitation and tourism revenue for the territory.
- It is expected that the de-valued Canadian dollar combined with dropping gas prices will drive increases in both Canadian rubber tire traffic and adventure travel to Yukon with its long haul markets (including motor coach and cruise). As a result, Canadian-based media outlets will likely continue to promote Yukon as an ever-attractive destination.

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Key Initiatives: Consumer

- Implement Year 2 of the Yukon Now project (i.e. develop 4 summer-themed television commercials deployed under the Destination Yukon campaign, Digital Storytelling Project , User-Generated Content initiative, digital & social media)
- Develop and implement a year-round Destination Yukon plan to maintain a consistent in-market presence for Tourism Yukon, utilizing the winter and summer campaigns to enhance activity during peak travel planning and booking periods.
- Acquire new brand-aligned content through User Generated Content and purpose-shot initiatives, in order to increase consumer's engagement with Destination Yukon campaigns and Yukon content overall.

Key Initiatives: Media Relations

- Employ an in-market media sales agent to seek and solicit top tier media outlets and non-traditional partnerships to gain an edge over competitors and an ongoing in-market presence.

Key Initiatives: Trade

- Work with the Canadian receptive tour operators to increase the number of Yukon products in their programs, and utilize their extensive sales networks to increase the amount of product being carried by international tour operators.

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UNITED STATES (U.S.)

Market Classification

While the US market represents our largest number of visitors from any single geographic market, our ability to influence the travel decisions made by travellers from this market, who are predominantly bound for Alaska, is limited. However, the US market clearly presents opportunities for increasing daily expenditures and encouraging longer length of stay. It is recommended that an enhanced focus be placed on 'producing' key accounts, building upon relationships with Alaska-based RTOs, seeking opportunities in high-yield niche markets, and maintaining our partnership with Alaska. Investments in Tourism North and Joint Yukon Alaska will remain, as both programs are delivering solid inquiries and conversion.

Market Outlook

- Destination Canada's announcement of its renewed investment in the US market should result in increased partnership opportunities for Canadian jurisdictions on consumer and trade based marketing initiatives. Media-related activities such as Canada Media Marketplace, and PDMO-driven in-market media events, are likely to continue.
- Canada's larger and richer jurisdictions - many of whom, in the absence of Destination Canada, continued with US targeted marketing efforts (consumer/trade/media relations) - will dominate Destination Canada partnership driven programs. This highlights the importance of maintaining partnerships with the State of Alaska, and tour operator partners such as Holland America Line, as well as the need to increase efforts to target media and the travel trade.
- The Yukon Now initiative will help to increase domestic consumer awareness of Yukon as a year-round travel destination (through increased media coverage) and may help to plant the seeds necessary to build US-based PR partnerships.

Key Initiatives: Consumer

- Deliver an enhanced offer to Joint Yukon Alaska lead respondents by including a new fly-drive lure brochure with the Yukon/Alaska mail-out package.
- Increase awareness of the Yukon and its product offering by working directly with the Tourism North social media team to provide targeted social content about the Yukon.

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Key Initiatives: Media Relations

- Maintain and strengthen Tourism Yukon’s relationship with Destination Canada in expectation of renewed Destination Canada interest in the US market.
- Utilize Yukon Now resources to gain US market presence through increased media relations and PR activities.

Key Initiatives: Trade

- Utilize the findings of the 2014 US market travel trade research project to develop a strategy to reach, educate, and attract more U.S. based niche market tour operators.
- Enhance and maintain relationships with motor coach group tour key accounts.
- Organize familiarization (FAM) tours for Alaska based receptive tour operators to increase the number of Yukon products in their programs, and thus increase the amount of Yukon product being carried by tour operators in the US market.

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GERMAN-SPEAKING EUROPE (GSE): Germany, Switzerland, Austria

Market Classification

German-speaking Europe remains the Yukon's largest overseas market. Tourism Yukon's MPA along with reports of a strong sales season by German and Swiss tour operators, indicates that German-speaking Europe market has strong future growth potential that is reflective of current budget allocations. Air access as a result of our direct, non-stop charter flight from Frankfurt and increased international lift to Vancouver and Calgary highly enhances our ability to target German-speaking Europe. Budget allocations remain similar to 2014 levels.

Market Outlook

- There is a relatively good level of awareness of the Yukon as a travel destination at the consumer level relative to the Yukon's other overseas target markets. In addition to extensive travel media coverage of the Yukon in the market, the Fulda Yukon Challenge generates approximately 5 million dollars annually in unpaid media awareness for Yukon. And Yukon Bay at Hannover Zoo provides excellent opportunities for Yukon education in the market, given that approximately 1.5 million people visit the zoo annually.
- The Yukon enjoys excellent air access from German Speaking Europe (GSE) including a direct, non-stop, weekly flight in summer (Condor) and one-stop flights with connections from Vancouver or Calgary via Air North, Yukon's Airline, Air Canada and its Star Alliance partners, and WestJet and its codeshare partners.
- Several established Yukon suppliers are currently in the market actively targeting the German, Swiss and Austrian travel trade, and to a lesser extent, direct consumer bookings.
- The extensive travel trade consolidation in the market during the past decade and generally low margins/profitability makes it more challenging for the trade to introduce new products. That said, the Yukon is generally a high yield destination for GSE wholesalers, making our destination more attractive.
- The general lack of awareness and/or interest in Yukon winter products means outbound travel from the market is focused primarily on the summer months, though we are starting to see signs of interest in promoting Yukon winter products in GSE.
- Tour operators in the GSE market report very positive sales for summer 2015 due to pent up Canada demand and highly favourable exchange rates, and this view is shared by Yukon suppliers.

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Key initiatives

- Trade and media familiarization tours to Ivvavik National Park in partnership with the Destination Canada, Parks Canada, and Tourism NWT, are planned for June 2015.
- An Executive Familiarization tour for our key account partners in Germany is planned for August 2015.
- A familiarization tour for senior officials from Condor Airlines is scheduled for autumn 2015.

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07. SECONDARY MARKETS

AUSTRALIA

Market Classification

Australia is the Yukon's second largest overseas market in volume, and the market value and appeal indices indicate the Australian market has strong future growth potential. Length of stay and strong product-market match and high visitor advocacy, suggest Australia is a key opportunity for both summer, and in particular winter visitation. Future growth will be augmented by in-market representation that was contracted in November 2013.

Market Outlook

- The Australian economy faltered some in 2014, with the close of several manufacturing plants signifying a change in the market's economic stability. Outbound travel is still high compared to other countries, but not to the same degree as in previous years.
- Overall, cruise/rail/Rockies packages remain the core Canadian product for Australian travellers.
- By number, Australian visitation to Yukon is largely Alaska cruise passengers visiting on post-cruise land packages or shore excursions. Tourism Yukon supports growth of the cruise market but our focus for Australia is on influencing the FIT market for Yukon or "Plus Yukon" (dual southern-Canada/northern Canada itinerary) holidays.
- Despite the traditional cruise/rail packages that focus on B.C. and Alberta, Australian trade and media express high interest for "something new." Yukon is becoming better known among key trade wholesalers seeking alternatives to traditional Canadian product.
- Several established Yukon suppliers are currently in the market actively targeting the Australian travel trade.
- Consumer awareness for Yukon is still relatively low, prompting significant efforts in media programs over the past year. Tourism Yukon hosted a major broadcast TV program and several high-profile print publications on familiarization tours in 2014 that resulted in excellent Yukon exposure.
- Consumer awareness is centred primarily on winter aurora viewing packages, perceived favourably as a "bucket list" experience. Yukon is strategically positioned to leverage this interest with the high numbers of Australian travellers travelling to B.C. or Alberta on ski vacations.

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- Yukon holds strong appeal for Australian consumers who have visited Western Canada previously and are keen to explore more of the country. There is strong product-market match for wildlife viewing, scenery and outdoor pursuits. Self-drive is another area with growth potential.
- Australian travellers have frequent air access into Vancouver, offering excellent opportunities to travel to Yukon.

Key Initiatives

- Host key media to increase consumer awareness of Yukon.
- Outreach, training and support of key travel trade partners focused on the FIT market.
- Leverage celebrity visits to generate word of mouth awareness of Yukon among consumers
- Pursue non-traditional partnerships to generate awareness of Yukon as a stand-alone destination.

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UNITED KINGDOM (U.K.)

Market Classification

Spend data, length of stay (including increased winter travel), market value and appeal indices indicate the UK market has strong future growth potential that is reflective of current budget allocations. In addition to Air Canada's service from the U.K., air access is improving as a result of the British Airways' new code share agreement with WestJet and interline partner (Air Canada) via Vancouver that enhances our ability to target the UK. Potential inter-provincial partnerships with BC, Alberta and Alaska would further enhance the Yukon's position in the market. Future growth will be augmented by in-market representation which was engaged in 2013.

Market Outlook

- The Yukon has a close working relationship and information sharing with Destination Canada and favourable relationships with established UK travel trade and media.
- The Yukon enjoys good one-stop air access from the UK via Vancouver and Calgary.
- Several established Yukon suppliers are currently in the market actively targeting the U.K. trade and to a lesser extent direct consumer bookings.
- Social media adoption is further advanced here than in continental Europe, presenting new and cost-effective mechanisms to reach consumers.
- Opportunities for the Yukon include the presentation of new and enhanced product offerings, including experiences beyond traditional touring, such as northern lights viewing.
- Several new tour wholesalers have indicated they will add Yukon products to their Canadian programs for the first time, or increase the number of Yukon packages they are carrying as a result of the work of our in-market representatives over the past two years.
- Canada (and thus the Yukon) is experiencing the effects of increased competition and value from competing destinations offering similar experiences (such as the U.S., New Zealand, and Asia).

Key Initiative(s)

- A media familiarization tour is scheduled for spring 2015 in partnership with Destination Canada and Tourism Vancouver.

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A trade familiarization tour is scheduled for fall 2015.JAPAN

Market Classification

Winter aurora visitation in the 2013-2014 winter season was down from the 2012-2013 season for numerous reasons not unique to Yukon. However, successful efforts encouraging trade to include Yukon summer/fall colour/aurora packages coupled with a strong 2014-2015 winter aurora season indicate potential for growth. Added air capacity from Tokyo Haneda, and ANA from Osaka to Vancouver is an opportunity for increased bookings to Yukon, though this requires continued involvement in influencing air carrier partners for improved connectivity.

Market Outlook

- Several established Yukon suppliers are currently in the market actively targeting the Japanese travel trade.
- Yukon has growth opportunity in the Japanese market, specifically by establishing more awareness of Yukon as an aurora viewing destination as well as increasing visitation in the fall and summer seasons focusing on outdoor nature activities.
- Yukon is strategically poised to benefit from recent and upcoming increased air access from Japan to Vancouver: from Tokyo Haneda airport (HND) (began March 31, 2014) and a new Air Canada daily seasonal flight from Osaka Kansai (KIX- starting May 2015).
- Despite the improved air access, trade partners must still navigate practical issues when developing itineraries, namely airline code-sharing, through-fares from Vancouver, seat capacity, reservation blocks and connection times which are not always easily managed.
- Efforts have been made to expand travel trade awareness of Yukon products with a B2B marketplace for receptive tour operators and two major trade familiarization tours in 2014. Operators have since started to develop new Yukon itineraries that show promise for growth.
- Japanese consumer awareness is relatively low beyond awareness of winter aurora viewing, where other destinations are still better known. Tourism Yukon invested in several major media projects in 2014 to raise the destination's profile, including three major television broadcast productions and several print media familiarization tours.
- Yukon's Minister-led tourism sales mission in February 2015 brought unprecedented destination awareness and product training to trade partners in the market.

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- Tourism Yukon’s approach includes retaining and/or growing our winter aurora market share vis-a-vis our competitors, combating the perception that the aurora is on a downward cycle and developing summer/fall product with Canadian based RTOs and Japan-based tour operators.

Key Initiatives

- Participate in Canada Theatre, the Destination Canada’s flagship new Japan media/consumer content initiative.
- Partner with Destination Canada film to develop content and media coverage for Canada Theatre to drive travel trade adoption and sales of new Yukon itineraries.
- Support tour operators and receptive tour operators offering new Yukon itineraries with marketing and training initiatives.

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08. EMERGING MARKETS

NETHERLANDS (BENELUX)

Market Classification

Despite a weakened economy the Netherlands has provided relatively steady visitation over the past number but shows good potential for future growth. The appointment of a GSA in the market in 2014 has resulted in increasing tour operator demand, heightened media interest (particularly television), and a strong product-to-market match. Yukon made a significant increase in investment in The Netherlands in 2014 and will maintain this investment in 2015-2016, as the market is responding to the increased promotional activity. Air Canada's new flight from Amsterdam to Canada in 2015, and Air France/KLM via its code share partner (WestJet) and an improving economy suggest Dutch travelers will be looking to Canada in greater numbers in future.

Market Outlook

- The Yukon enjoys good one-stop air access from the Netherlands via Vancouver, Calgary, and Edmonton.
- The typical Dutch holiday to Canada lasts 18-21 days, making this an attractive market for the Yukon.
- Long-haul vacation spending tends to be lower for Dutch travellers than those from GSE or the UK. Thus, all-inclusive holidays such as motorhome rental holidays are popular. As a result, motorhome travel is very popular for the Dutch, and off the beaten track travel is particularly appealing.
- The Dutch travel trade is well established; there are some 50 companies offering Canadian tourism products.
- The general lack of awareness and/or interest in Yukon winter products means outbound travel from the market is focused primarily on the summer months.
- Several established Yukon suppliers are actively targeting the Dutch market through the travel trade, and to a lesser extent, through direct consumer bookings.
- There are significant opportunities for growth for the Yukon in the Dutch market, particularly around motorhomes, self-drives, and (some) guided wilderness travel/exploration.

Key Initiative(s)

- Tourism Yukon went out to RFP for a full time a general sales agent for the Dutch market in February 2015. ITN Travel (Karin Gomes) was the successful proponent.

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- A familiarization tour for the Dutch travel trade will be offered in September 2015.

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FRANCE / French-speaking Europe

Market Classification

The opportunity and appeal indices of the MPA suggest there is potential for Yukon to gain market share. However, despite relatively consistent visitation and annual investment by Tourism Yukon over the years, the market struggles to see much growth. The Yukon does offer significant French-language services at the supplier level, and Tourism Yukon enjoys an excellent relationship with L'Association Franco-Yukonnaise. New French-speaking tourism products here in the Yukon, increased air connectivity through Vancouver provided by Air France/KLM via code share partner (WestJet), as well as interline partner (Air Canada), and the strong support of Destination Canada in France improve our outlook and ability to market in future. The French-speaking European market would benefit from continued nurturing through a strategic approach involving motivated suppliers and other partners, including NGO's.

Market Outlook

- First-time French travellers to Canada are generally destined for Quebec, but repeat travellers tend to seek new experiences in western Canada.
- The Yukon has high appeal with the French, with 15% indicating they would like to include the territory on their next trip (YVTP).
- The Yukon offers potential visitors a vibrant Yukon francophone community and a wide range of tourism businesses catering to French-speaking travellers.
- Tourism Yukon is able to access highly cost effective French translation services within the Yukon for its collateral materials.
- L'Association Franco-Yukonnaise (AFY) is also interested in promoting Yukon as a vacation and investment destination for French-speaking travellers, and has developed its own French language collateral materials to compliment the Tourism Yukon French language consumer website. Additional opportunities exist to continue building on and expanding the partnership with AFY in the coming year.

Key Initiatives

- Tourism Yukon will expand its partnership with AFY to implement a marketing campaign targeting trade and media in the French-speaking European market in 2015/16.

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CHINA

Market Classification

Increasing visitation to Canada and the Yukon (more than 2,700 border crossings in 2014) combined with interest from Yukon tourism suppliers, interest from the travel trade in China, and the presence of Chinese receptives based in Whitehorse and Vancouver, suggest an enhancement of our activities in this market is warranted. Good air access (as a result of the China Eastern and Cathay Pacific/WestJet code share agreements) from China into Vancouver also raise the potential as air capacity into YVR exceeded 500,000 last year and continues to grow. Chinese market development will require investments in education for both trade and Yukon suppliers' market readiness. Tourism Yukon hosted a China Forum in November 2014 to introduce Yukon suppliers to the market. Tourism Yukon continues to work with a new Yukon receptive tour operator focused on the Chinese market, to develop tour operator/receptive services in Yukon for China. Strategic explorations will begin in partnership with Destination Canada in China, with an emphasis on trade education and media relations/PR activities as important next steps in growing visitation from this market.

Market Outlook

- The “China market” is not one entity but rather multiple sub-markets of Chinese speakers, each offering growth potential for Yukon. Development of each of the sub-markets will be assessed individually. These sub-markets include:
 - Mainland China
 - Tier 1 cities: e.g., Beijing, Shanghai, Guangzhou
 - Tier 2 cities: e.g., Shenyang, Hangzhou, Chengdu
 - Taiwan
 - Hong Kong
 - Chinese-speaking Canadian & U.S. markets: (i.e., Vancouver, Seattle, San Francisco, etc.)
- Mainland China continues to outpace all other markets for growth to Canada and Yukon. Year-over-year travel from China to Canada was up 30% last year. Outbound travel from China was up 18% (Source: Destination Canada).
- Mainland Chinese enjoy an appreciating currency, strong economy, frequent air access to Vancouver via multiple carriers, easing visa restrictions and processing, and have significant sophistication in booking travel on their own.
- Market dynamics change quickly. Since Canada received Approved Destination Status (ADS) in 2010, there has already been a shift away from large, ADS-groups to increasing numbers of small group tours and FIT direct bookings with online travel agencies.

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- The small group/FIT market is comprised of young (under 35), experienced travellers who are tech savvy, speak English, and are looking for something new; as well as high-end, luxury travel experiences.
- Overall awareness of Yukon is low, among both consumers and travel trade. Trade recognition of Yukon is in conjunction with aurora viewing product, but competing destinations are better known.
- Yukon has significant opportunity to grow inbound travel from any or all of the Chinese-speaking markets. Opportunities exist for year-round travel, including: aurora viewing, culture, soft adventure, wildlife viewing, and self-drive.
- To capitalize on growth opportunities, it will be important to focus Yukon's efforts on our capacity to market and industry's capacity to accommodate the potential volume and expectations of this market. Examples of this include:
 - Chinese consumer marketing platforms / social media (e.g., website, Weibo, WeChat)
 - Merchant payment system compatibility (e.g., Union Pay, AliPay)
 - Transportation and accommodation capacity
 - Availability of Chinese-language guiding/interpreters/information services in Yukon
- Yukon's Minister-led Tourism sales mission in March 2015 brought unprecedented destination awareness and product training to trade partners and media in the market.

Key Initiatives

- Partner with Destination Canada to present Yukon within its marketing in China
- Host a film production to create Yukon for China's key web/consumer program, Zhou You Jia Na Da, and its affiliated platforms, for the CTC TV initiative (June)
- Maintain a Tourism Yukon-branded Mandarin-language website (travelyukon.cn) and Weibo social media channel with measured content engagement (launched March 2015).
- Support Receptive Tour Operators (RTOs) who are selling or interested in selling Yukon.
- Collaborate with other destination partners to leverage a "Plus Yukon" approach that encourages trade partners to create dual-destination itineraries.

2015 – 2016 MARKETING PLAN

09. MONITOR MARKETS

SOUTH KOREA

Market Classification

Relatively low visitation and tour operator demand/product packaging - despite actively targeting the market for several years - prompted South Korea's status as an Emerging Market to be downgraded to Monitor in 2013-14. Border crossing stats from the market showed some solid growth figures in 2013-14. In 2015-16, Tourism Yukon will once again maintain its participation in Destination Canada's Korea SNS blogger program, and will continue to support tour operators (i.e FAM tour initiatives, sales support, etc), and any media relations outreach opportunities presented through our partnership with Destination Canada.

Market Outlook

- Korea visitation to Canada overall has been decreasing since 2006; however this is driven largely by a sharp decline in student travel, while leisure travel to Canada – and Yukon - has been on the rise.
- South Korea has good air access through Vancouver (though many flights also arrive into Seattle and increasingly to Toronto).
- This market trends toward dramatically increased FIT travel and young (under 35) travellers, although overall awareness of Yukon is low.
- Interest in winter Aurora viewing product is increasing; however, other destinations are better known.
- Blogs are still one of the strongest influencers of destination choice amongst travellers in this market and this platform should be leveraged.
- FIT travel presents the best opportunity for Yukon, but group travel will be important to raise overall awareness of the destination in the market.

Key Initiatives

- Participate in Focus Canada Korea, Destination Canada's in-market roadshow, to raise awareness among travel trade and media (April 2015).
- Host one blogger familiarization tour as part of Destination Canada Korea's SNS media influencer program.
- Invest in a search engine marketing (SEM) campaign to support awareness and sales of Yukon packages.
- Host two key FIT tour operators on a summer FAM tour.

2015 – 2016 MARKETING PLAN

MEXICO

Market Classification

Destination Canada's research shows good potential for Yukon attracting Mexican visitors, and the Canadian government has recently introduced some initiatives that will alleviate some of the previous requirements for obtaining a Canadian visa. In recent years, Mexico has shown some good return on investment in marketing Yukon aurora viewing experiences. Tourism Yukon will continue to monitor this market, support Yukon suppliers/operators active in the Mexican market and work with Canadian-based receptives targeting Mexico, and in 2015-16, will return to actively marketing in Mexico by attending key trade and media events in the market.

Market Outlook

- In 2014, changes in the visa requirement made it easier for Mexicans to travel to Canada, and the number of visa approvals increased drastically. The number of Mexican travellers to Canada increased by approximately 14%. Destination Canada is predicting a 100% increase in the number of Mexican visitors to Canada in the coming year.
- Research shows that over 2 million Mexicans will definitely/very likely visit Canada in the next two years. Destination Canada has developed an enhanced strategy focused in targeting the travellers' path to purchase through an appeal to buy Canada now.
- Affordable air access remains a critical success factor for the Mexican market. In addition to Air Canada, Aeromexico just launched a new direct flight from Mexico City to Vancouver at a very competitive price.
- Mexicans coming to the Yukon are specifically interested in aurora viewing and experiencing winter offerings in the snow.

Key initiatives:

- Develop and continue to maintain strong relationships with Canadian-based RTOs who are active in the Mexico market and support these RTOs through training, resources, co-operative marketing and FAM tours.
- Work with local tour operators who are actively targeting this market to develop a strategy for increasing visitation in the coming years.
- Participate in Conozca and Go Media Mexico in August, 2015
- Partner with Destination Canada Mexico in a co-op marketing campaign in October, 2015

2015 – 2016 MARKETING PLAN

BRAZIL

Market Classification

Yukon tour operators are reporting some growth in visitation from Brazil, primarily for winter/aurora viewing. These vacationers are usually visiting the Yukon as part of a longer Canadian winter skiing and shopping holiday. Tourism Yukon will continue to monitor this market, support Yukon suppliers/operators active in the Brazilian market, and work with Canadian-based-receptives targeting Brazil. However, additional activities such as media relations/PR or partnering in Destination Canada initiatives for Brazil are not recommended at this time. Language remains a challenge for the Yukon as Brazil is a Portuguese speaking-country, and very few Yukon tourism suppliers offer services in Portuguese.

2015 – 2016 MARKETING PLAN

10. MEETINGS, INCENTIVES, CONVENTIONS AND EVENTS (MICE) AND SPORT TOURISM

MEETINGS, INCENTIVES, CONVENTIONS AND EVENTS (MICE)

Tourism Yukon will continue to partner with the Yukon Convention Bureau (YCB) to promote the Yukon as a MICE destination. The YCB is a non-government organization (NGO) with more than 100 members committed to promoting Yukon as a MICE destination. Since its inception in 1998, the YCB has developed a trusted and recognized brand in the meetings and conventions marketplace – Yukon: Experience the Rush positions Yukon as an exciting Canadian MICE destination. YCB targets MICE planners interested in hosting their events in Yukon. It reaches these planners primarily by attending trade shows, marketplaces and other sales events.

YCB core marketing activities include:

- Internet marketing specific to the needs and interests of meeting and convention planners
- Hosting association executives and meeting planners on site visits to showcase Yukon's growing inventory of meeting and convention facilities, activities and suppliers
- Conducting sales calls to Yukon regional, national and provincial association executives and meeting planners
- Encouraging and supporting local associations, government agencies, First Nations and municipalities to host meetings and events in Yukon

SPORT TOURISM

Tourism Yukon provides funding to Sport Yukon to lead and manage sport tourism marketing primarily in Canada amongst national, regional and local sport organizations and other key stakeholders. This investment continues to attract, support and facilitate the hosting of sporting competitions, major games and sport meetings in Yukon. In the coming year, we will be working together to address capacity and other challenges related to sport tourism.

2015 – 2016 MARKETING PLAN

11. TOURISM MARKETING BUDGET 2011/12 – 2015/16

Marketing	2011– 2012	2012– 2013	2013– 2014	2014– 2015	2015– 2016
GLOBAL MARKETING OPERATIONS					
Marketing Operations	156,000	163,000	175,000	198,000	193,000
Brand/Image	150,000	180,000	160,000	125,000	120,000
Yukon Convention Bureau (YCB)	200,000	200,000	200,000	200,000	200,000
Sport Tourism (Sport Yukon)	43,000	43,000	43,000	43,000	43,000
Destination Canada EQ License					25,000
SUBTOTAL – Global Marketing Operations	549,000	586,000	578,000	566,000	581,000
NORTH AMERICA					
Consumer Marketing – Operations	170,000	114,000	123,000	155,000	134,000
YukonNOW – Consumer					1,505,000
Destination Yukon (CAN)	646,000	720,000	620,000	650,000	600,000
Joint Yukon–Alaska (U.S./CAN)	240,000	220,000	157,000	147,000	173,000
Media and Public Relations	210,000	245,000	190,000	200,000	250,000
Travel Trade (including Mexico)	215,000	204,000	261,000	261,000	251,000
Wilderness Tourism Association	264,000	264,000	264,000	264,000	264,000
Tourism North	110,000	110,000	120,000	110,000	130,000
Yukon Quest	150,000	150,000	150,000	150,000	150,000

2015 – 2016 MARKETING PLAN

Marketing	2011– 2012	2012– 2013	2013– 2014	2014– 2015	2015– 2016
SUBTOTAL – North America	2,005,000	2,027,000	1,885,000	1,937,000	3,457,000
OVERSEAS					
German-Speaking Europe	669,000	564,000	615,000	550,000	580,000
United Kingdom	286,000	285,000	340,000	315,000	260,000
France & Benelux					145,000
Japan, China, South Korea	209,200	266,000	200,000	255,000	335,000
Australia	258,000	141,000	255,000	215,000	240,000
Research	17,500	44,000	36,000	0**	40,000
SUBTOTAL– Overseas	1,439,700	1,300,000	1,446,000	1,335,000	1,600,000
OTHER MARKETING ACTIVITIES					
Website/Digital	438,000	470,000	410,000	390,000	415,000
Publications/Promo Materials	335,000	356,000	380,000	390,000	385,000
Fulfillment	258,000	276,000	260,000	290,000	252,000
Displays	20,000	20,000	20,000	20,000	20,000
SUBTOTAL – Other Marketing Activities	1,051,000	1,122,000	1,070,000	1,090,000	1,072,000
TOTAL MARKETING FUNDING*	\$5,044,700	\$5,035,000	\$4,979,000	\$4,928,000	6,710,000

* Does not include personnel costs

2015 – 2016 MARKETING PLAN

12. TOURISM YUKON MARKETING UNIT TEAM

JUNE 2015

Robin Anderson

A/Senior Manager, Global Marketing

Jessica Ruffen

Market Manager, Asia-Pacific

Jim Kemshead

Marketing Specialist, Media and Public Relations

Emily Sheff

A/Marketing Specialist, Consumer, North America

Annie-Claude Dupuis

Marketing Specialist, Trade, North America

Stephen Reynolds

Digital Marketing Strategist

Michelle Wieser

Marketing Specialist – Digital Content

Vacant

Marketing Specialist

Jennifer Glyka

Marketing Coordinator