



Tourism Yukon

2016 - 2017

Marketing Plan



2016 – 2017 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 be attracted by the buying power of their stronger currencies against the Canadian dollar. The lower dollar does put pressure on our investments in the overseas markets; resources simply don't go as far as we like. However, international demand for Yukon does remain high and we are able to capitalize on this trend regardless of the exchange rate.

The 2016-2017 Tourism Yukon Marketing Plan builds on the foundation of previous years' plans, while recognizing the impact that global events like economic downturns and volatile financial, fuel and stock markets have on our tourism visitation 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.

As we Tourism Yukon is mindful of the challenges that tourism marketers and businesses in Yukon continue to face, many of which will require a long term approach to resolve. Our strategic approach takes into consideration the current national and international environment as well as Yukon's existing capacity of product, experiences and infrastructure and focuses on those markets that have traditionally produced longer-stay, higher-spending visitors that provide the highest return on investment for Yukon.

In building our annual marketing plan, we identify strategic priorities that in many cases require a multi-year commitment to achieve. The strategic priorities for 2016-17 noted within this plan have been developed in collaboration with the Yukon's tourism industry through the Tourism Marketing Committee (TMC), a sub-committee of TIA Yukon, and are influenced by our day-to-day interactions with Yukon tourism operators and industry stakeholders. These strategic priorities provide context and insights that in turn inform our marketing programming that will be undertaken in the coming year to achieve Tourism Yukon's overall goal of generating economic growth and increasing tourism revenue for the territory.

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At the heart of our approach is the consistent deployment of Yukon's Larger than Life tourism brand in a way that builds familiarity and a powerful personal relationship with the Yukon tourism experience. Our marketing messages and investments are designed to move travelers further down the path to purchase from awareness to trip planning AND foster a sense of urgency to visit Yukon.

The 2016-17 Marketing Plan is built on a foundation of research, market intelligence and expertise (provided by our staff, our in-market sales force, and agency of record) that allows us to leverage a compelling brand platform built in collaboration with Yukon's tourism industry. The plan is designed to ensure we keep pace with global competition, while maximizing the efficiency, effectiveness and return from our marketing investments.

The anticipated outcome from our marketing investments is sustainable growth in tourism revenues for Yukon businesses. We are forecasting modest growth in the coming year. There are a number of factors that contribute to this assessment. 1) Growing visitation from the domestic market fueled by the Yukon Now program in 2015 and 2016. 2) Exceptional air access. 3) Growing interest in aurora viewing in the late summer, fall and winter. 4) The recovery of the U.S. economy and the renewed investment of Destination Canada there. 5) Expanded investments in overseas marketing, fueled by the Yukon Now program.

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02. OUR APPROACH

Tourism Yukon's marketing framework takes a channel marketing approach: Consumer; Travel trade; Media/Public relations; 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 the Yukon as a travel destination, build a desirable image of the 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 (consumer-level marketing in overseas markets is primarily achieved through strategic co-operative marketing investments with key tour operator partners).

In 2013, Tourism Yukon enhanced its investment in Destination Canada's (formerly the CTC) Explorer Quotient® (EQ®), using this research to identify Yukon's best customers by EQ segment, to further refine our understanding of their behaviors and motivators. The following year, we began leveraging this rich segmentation data to enhance the reach, effectiveness and efficiency of our marketing investments in Canada.

2016-17 will see us further utilizing segmentation data to help us to inform our marketing investments in the Canadian market. The goal is to engage our target customers with to move them down the path to purchase towards the vacation planning phase by serving "the right content, to the right people, at the right time", particularly in the digital domain. Shifting to a content-based, data-driven marketing model, will assist us in implementing our consumer facing initiatives through the Destination Yukon Program.

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

- Advertising (digital, print, out-of-home and, increasingly, broadcast);
- Digital marketing (website search engine optimization, e-marketing, pay-per-click);
- Social media;
- Direct marketing – list purchase, re-contact;
- Re-marketing;
- Customer Relationship Management (CRM), i.e. e-newsletters, etc. ;
- Consumer shows;
- Partnerships and co-operative marketing.

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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 that packages and promotes Yukon tourism products and experiences. Consumer protection laws in most of our overseas markets generally favour those consumers who book through approved tour operators. Tourism Yukon leverages the relationship that our travel trade partners have with their clients and sales networks in-market. And while all trade partners are important, we emphasize our relationships with our key account tour operators in all markets, and endeavor to enhance and strengthen these partnerships wherever possible.

2016 will see a continued investment in the travel trade channel with an emphasis on receptive tour operators (RTO's) who are critical in the distribution of Yukon tourism products to the travel trade in the international markets. Online travel agencies (OTA's) are continuing to grow in importance, and Tourism Yukon will evaluate how it can better service this important distribution medium, with an eye to growing the type and scope of Yukon tourism products being carried online.

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;
- Encouraging the travel trade to carry and promote Yukon products and experiences;
- 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);
- Providing up-to-date product and planning information on an on-going basis;
- Assisting with key issues in-destination that constrain or discourage tourism sales growth.

Media and Public Relations

Tourism Yukon develops and delivers a number of strategic Media 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.

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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 account 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
- Encouraging and supporting social media “influencers” (i.e. bloggers, instagrammers, etc., with large numbers of followers that meet our target demographic and psychographic consumers) to travel to the Yukon, allowing us to leverage their followers into followers of Tourism Yukon’s social media channels, and assist in raising the awareness of the Yukon as a travel destination.

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-targeted 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. The MPA will be deployed in 2016 to review investments in all markets against key indicators and to evaluate our market classifications to ensure that these investments are providing the best return to the industry.

We classify our geo-markets as Primary, Secondary, Emerging and Monitor. Tourism Yukon's 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 Consumer (where deemed appropriate)

- Australia
- United Kingdom
- Japan

Emerging

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

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- Netherlands (Benelux)
- France
- China

Monitor

Channels: Responsive to Trade, Media Relations/PR

- Brazil
- South Korea*
- Mexico*

*Note: Improved market conditions, increasing trade interest and increasing visitation from these markets has resulted in a continued enhancement of our marketing activities in these geo-markets in 2016-17.

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04. STRATEGIC PRIORITIES 2016-2017

- 1) Refresh web, digital and print collateral utilizing the content strategy developed in 2015-16 to emphasize brand, marketing pillars and Glass Vault Strategy.
- 2) Develop and deploy content targeting an expanded range of consumers on the Path to Purchase.
- 3) Maximize opportunities to promote the Canada 150th and Alaska Highway 75th anniversaries in 2017 across programs, geographic markets, and channels.
- 4) Secure ongoing/continued funding under the Yukon Now program

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06. PRIMARY MARKETS

CANADA

Market Overview

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 should be investing more in the domestic market, leading to the enhanced investment in this market through the Yukon Now program in 2016-17.

The United States remains the most important country of origin, in terms of volume of visitors coming to Yukon. The increase in higher yield Canadian travellers coming to Yukon over the past few years and our stronger capacity to influence Canadians' travel decisions position the domestic market as our main focus of investment. However, Destination Canada's recent re-entry into the US market, presents some opportunity for us to enhance our position to reach Yukon destination specific consumers in targeted geographic markets (i.e. Pacific Northwest, California, New York, etc), and access niche-markets such as adventure travelers, leveraging the Connect America program.

2016-17 will see a continued investment in the deployment of the Destination Yukon campaigns, including the deployment of the 6 commercials developed under the Yukon Now program in 2015, while moving to a year round presence in the domestic consumer market, beginning to integrate the Content Strategy (i.e. content acquisition, curation, publication, and distribution of content) developed in 2015-16, encouraging the sharing of user-generated content, enhanced US and overseas marketing initiatives. Fundamental to all marketing initiatives is research, and Tourism Yukon will continue to invest in research to inform all of its marketing initiatives, with a particular focus on the domestic market as noted above.

Market Outlook

- In spite of Brand USA's ongoing efforts to lure Canadian visitors south of the border, the upcoming year represents an opportunity for Yukon. It is expected that the lower 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 Canadian destinations, including Yukon, as attractive travel destinations for Canadians.

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- Although Tourism Yukon will need to remain strategic in its choice of tactics to optimize the return on investment, the Canadian economic situation will likely result in Canadian travellers being enticed to further explore their own country.
- The flourishing domestic Millennials' travel market represents a new opportunity for Tourism Yukon. Destination Canada is implementing a multi-year 'Canadian Millennials Travel Program' surrounding Canada's 150th anniversary in 2017. Partnering with the northern territories to invest in the Destination Canada program will provide Yukon with a platform to broaden its appeal to a younger demographic, on a highly cost effective basis.

Key Initiatives: Consumer

- Refine and implement the consumer marketing program (Destination Yukon) focussing on the following priority areas:
 - To increase awareness of Yukon as a tourism destination through broadcast and digital media buys that will leverage the assets acquired.
 - Expand our year-round marketing presence employing EQ – based targeting initiatives across all channels, with a particular emphasis on the digital environment.
 - Encourage and maintain the Yukon as a top-of-mind travel destination among Canadian consumer by developing, sourcing, syndicating and curating content inspirational to our target audiences.
 - Develop a customer relationship management (CRM) plan that will support the Marketing Plan; targeting those travellers who:
 - Have never visited the Yukon before, and;
 - Who have visited the Yukon previously who may visit again and can be utilized as brand advocates to encourage new visitation.

Key Initiatives: Media Relations

- Engage an in-market media sales agent to seek and solicit top tier media outlets and develop non-traditional partnerships to gain an edge over competitors
- Maintain an ongoing 'top of mind' presence among key travel media through the organizing and hosting of Yukon-themed in-market events.
- Attract top-tier travel print & electronic media by capitalizing on the 75th Anniversary of the Alaska Highway and the 150th Anniversary of Canada.
- Deploy a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.

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Key Initiatives: Trade

- Continue to work strategically with Canadian-based receptive tour operators to increase the number of Yukon products in their programs, and utilize their extensive sales networks to increase the amount and scope of product being carried by international tour operators.
- Develop and enhance relationships with key online travel agencies (OTA's) to encourage them to broaden the type and scope of products being carried.
- Develop a new travel trade website to engage new and existing tour operators
- Provide new sharable video and still photography content to broaden the awareness of Yukon travel experiences and related product among their target clientele.

UNITED STATES (U.S.)

Market Overview

While the US market represents our largest number of visitors from any single geographic market, their travel to the Yukon is often incidental and they are generally enroute to Alaska. However, the massive US market clearly presents opportunities, particularly given current currency exchange rates. The opportunities are two-fold; 1) we can continue to encourage an increase in daily expenditures among American traveler bound for Alaska by lengthening their stay in the Yukon and encouraging them to spend more while they are in the territory; and 2) began the task of building the awareness of the Yukon as the "end destination" through targeted initiatives with partners.

Market Outlook

- Destination Canada's announcement of its renewed investment in the US market will result in increased partnership opportunities for Canadian provincial marketing organizations (PDMO's) on consumer and trade-based marketing initiatives.
- Media-relations activities such as Canada Media Marketplace, and PDMO-driven in-market media events, are likely to continue.
- Canada's larger budget jurisdictions, will continue with their own US targeted marketing efforts (consumer/trade/media relations) - will heavily influence Destination Canada (DC) partnership driven programs, under DC's Connecting America program. This highlights the importance of maintaining partnerships with Alaska Tourism, and tour operator partners such as Holland America Line America, as well as the need to increase efforts to target media and the travel trade.

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- The production of high impact EQ based content, resulting from the development of new content, will give us assets easily adapted to our US EQ segments.
- The extremely favorable exchange rate for the US dollar may inspire Americans to look to its northern neighbour for travel.

Key Initiatives: Consumer

- Test consumer direct (CRM) marketing initiatives such as e-news with special offers to our US contact list.
- Increase the awareness of the Yukon and our tourism products in the US by working with and partnering with Destination Canada in its Connect USA program.

Key Initiatives: Media and Public Relations

- Maintain and strengthen Tourism Yukon's relationship with Destination Canada through strategic partnership in Destination Canada's re-vamped US media relations initiatives program.
- Engage an in-market media sales agent to seek and solicit top tier media outlets and develop non-traditional partnerships to gain an edge over competitors.
- Maintain an ongoing "top of mind" presence among key travel media through the organizing and hosting of Yukon-themed in-market events.
- Attract top-tier travel print & electronic media by capitalizing on the 75th Anniversary of the Alaska Highway and the 150th Anniversary of Canada.
- Deploy a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.

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 and scope of Yukon products being carried by tour operators in the US market.
- Deploy a new travel trade website to engage new and existing tour operators

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- Provide new sharable video and still photography content to broaden the awareness of Yukon travel experiences and related product among their target clientele.

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

Market Overview

German-speaking Europe remains the Yukon's largest overseas market. As proven by MPA data, the spend, length of stay, market value and appeal indices, and reports of an strong sales season by German and Swiss tour operators (many reporting double digit growth in sales to the Yukon over 2014) all indicate that German-speaking Europe market continues to have strong 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 by feeder airlines highly enhances our ability to target German-speaking Europe.

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. The Yukon enjoys continued extensive travel media coverage in the market. Yukon Bay at Hannover Zoo provides continued opportunities for Yukon awareness building and education in the market, as a result of the approximately 1.5 million people visiting the zoo annually.
- The Yukon enjoys excellent air access from GSE including a direct, non-stop, weekly flight in summer (Condor) and one-stop flights with connections from Vancouver, Calgary and Edmonton via Air North, Air Canada and its Star Alliance partners, as well as seasonal carrier, WestJet, and its codeshare and interline partners. Additional one stop lift to the Yukon is provided by sked charter carriers such as Air Transat and Iceland Air. Indeed the Yukon is the envy of many regions in Canada.
- Several established Yukon suppliers are currently in the market actively targeting the German, Swiss and Austrian travel trade, and a few Yukon suppliers are pursuing consumer-direct bookings from the market.
- The Yukon is generally a high yield destination for GSE wholesalers, making our destination highly attractive to package and promote.
- Outbound travel from the market is focused primarily on the summer months, but we are starting to see some tour operators promoting Yukon winter products in GSE with success.

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- The demand for Yukon products remains high in the market and this trend should continue for the foreseeable future. The Yukon is one of the only destinations in Canada to experience growth from the market over the past few years. Yukon products and experiences are extremely attractive to the GSE traveller and the demand is fuelled by highly favourable exchange rates.

Key initiatives

- A familiarization tour for senior officials from Condor Airlines originally scheduled for autumn 2015 was postponed and will occur in May 2016.
- Develop a new German language consumer website interface to highlight Yukon USP's, access and encourage click-throughs to GSE tour operators in the market carrying Yukon products.
- Deploy a new travel trade website to engage new and existing tour operators
- Deploy a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.
- Attract top-tier travel print & electronic media by capitalizing on the 100th anniversary of Jack London's death in 2016 and the 75th Anniversary of the Alaska Highway and the 150th Anniversary of Canada in 2017.
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.

07. SECONDARY MARKETS

AUSTRALIA

Market Overview

Australia remains the Yukon's second largest overseas market by visitor volume. Numerous factors suggest Australia has strong future growth potential and is a key opportunity for both summer and winter visitation. These factors include: good and growing air access; strong product to market match; high visitor advocacy rates; close collaboration with key travel trade partners; and strong media interest providing increased destination exposure. Tourism Yukon's activities in Australia will continue to be supported by in-market representation.

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Market Outlook

- Australian Consumer Confidence fell to a two-year low of 106.0 in mid-September 2015, but rebounded the following month to a five year high of 116.9 with a change of federal leadership. Global economic instability may affect future travel, though this market proved more resilient than others in the past recession. Year to date (Dec 2015) travel to Canada is up 3% compared to 2014.
- Australian travellers have good air access to Vancouver, providing excellent opportunities to travel to Yukon. Furthermore, air capacity to Canada from Australia is increasing, with the 2015 announcement of a new bilateral air services agreement to provide greater access for airlines from both countries. By Dec 2016 there is expected to be an additional 9,000 weekly seats between Canada and the four major Australian gateway cities. Specifically, Air Canada will commence daily flights in June 2016 from Brisbane to Vancouver; Qantas has increased capacity from Sydney to Vancouver at peak summer and winter periods; and Air New Zealand will increase frequency of its Auckland to Vancouver service.
- By number, Australian visitation to Yukon consists largely of Alaska cruise passengers visiting the Yukon on post-cruise land packages or shore excursions. While Tourism Yukon does develop programming to support the growth of the post-cruise market to the Yukon, our focus remains on influencing the FIT market for Yukon specific vacations or “Plus Yukon” holidays composed of dual southern-Canada/northern Canada itineraries (often in winter).
- Overall, cruise/rail/Rockies packages are the core Canadian product for Australian travellers. However, Australian media, and more recently travel trade, are showing interest for “new” Canadian tour product/destinations. With a key focus on trade training over 2014-16, Yukon awareness among travel trade is higher than in years past and accounts are ripe for increased product adoption and sales effort. Tourism Yukon will continue its trade training initiatives in 2016-17.
- Several established Yukon suppliers are currently in the market actively targeting the Australian travel trade.
- Further, as key Canadian receptive tour operators have increased their Yukon product offerings over the past 18 months following Tourism Yukon’s focussed work in this area, adoption of Yukon product by their Australian trade partners should follow.
- Consumer awareness for the Yukon is centred on winter aurora viewing packages, perceived favourably as a “bucket list” experience. In 2015, viewing aurora placed #1 on *International Traveller* magazine’s list of *100 Things to Do in*

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Canada Before You Die. The Yukon is strategically well-positioned to leverage this interest, and further opportunities exist to develop winter travel to the Yukon with the high numbers of Australians travelling to B.C. and Alberta on ski vacations.

- Consumer awareness for the Yukon's FIT summer season offerings is still very low compared to Canadian Rockies vacations. However, there is strong product-market match for the many Australians who have visited Western Canada previously and are keen to explore more of the country. Wildlife viewing, scenery, outdoor pursuits and lodge accommodations are all highly desired products. Self-drive is another area with growing potential.
- Over the past two years, Tourism Yukon has invested in programs to generate broad consumer awareness through earned media coverage. Working strategically to grow coverage on TV, print, online and digital/social channels, has resulted in excellent Yukon exposure.
- Additionally, a non-traditional partnership in early 2016 is expected to increase consumer awareness of the Yukon as a stand-alone outdoor destination.

Key Initiatives

- Outreach, destination training and financial support for select travel trade partners focused on the FIT market.
- Continue to work strategically with Canadian-based receptive tour operators to increase the number of Yukon products in their programs, and utilize their extensive sales networks to increase the amount and scope of product being carried by international tour operators.
- Develop a new travel trade website to engage new and existing tour operators
- Develop a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.
- Attract top-tier travel print & electronic media by capitalizing on the 100th anniversary of Jack London's death in 2016 and the 75th Anniversary of the Alaska Highway and the 150th Anniversary of Canada in 2017.
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.
- Other Specific initiatives to be determined.

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UNITED KINGDOM (U.K.)

Market Overview

The Yukon's third largest overseas market in terms of visitor volume, the UK remains a high priority market for the Yukon. Spend data, length of stay (including increased winter travel), and the market value and appeal indices in the MPA all indicate the UK market has strong future growth potential that merits budget prioritization. Air access continued to improve in 2015 with the addition of Dreamliner service to Canada from Heathrow. Potential inter-destination partnerships with BC, Alberta and Alaska would further enhance the Yukon's position in the market. To date, BC seems to be most interested in these types of partnerships as a result of product development work Tourism Yukon has done to encourage BC – Yukon combination products. Future growth will continue to be augmented by Tourism Yukon's in-market representation.

Market Outlook

- Tourism Yukon has a close working relationship and information sharing relationship with Destination Canada and strong relationships with established UK travel trade and media.
- The Yukon enjoys excellent capacity on one-stop routes 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 pursuing direct consumer bookings.
- Social media adoption is further advanced in the UK 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 – both in late-summer/early Fall, and other winter activities.
- Wholesale travel trade partners have indicated they will add Yukon products to their Canadian programs for the first time, or will increase the number of Yukon packages they are carrying, as a result of the work of our in-market representatives over the past three 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, South Africa and Asia). Favourable exchange rates will certainly help Canada's position in the UK, in light of the increased competition.

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Key Initiative(s)

- Outreach, destination training and financial support for select travel trade partners focused on the FIT market.
- Continue to work strategically with Canadian-based receptive tour operators to increase the number of Yukon products in their programs, and utilize their extensive sales networks to increase the amount and scope of product being carried by international tour operators.
- Deploy a new travel trade website to engage new and existing tour operators
- Deploy a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.
- Attract top-tier travel print & electronic media by capitalizing on the 100th anniversary of Jack London's death in 2016 and the 75th Anniversary of the Alaska Highway and the 150th Anniversary of Canada in 2017.
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.
- A trade familiarization tour is scheduled for spring 2016 in partnership with Destination Canada, Tourism Vancouver, Air Transat and Air North.
- Other Specific initiatives to be determined.

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JAPAN

Market Overview

Although Yukon tour operators indicated that Japan's visitor numbers to the Yukon dipped for winter aurora visitation in 2014, this past year (2015) saw a rebound, thanks in particular, to strong sales from the FIT market. In addition to investing in promotions to raise the Yukon's profile in this space, Tourism Yukon's efforts in recent years have also encouraged broader exposure to Yukon's tour offerings in the summer/fall seasons. 2015 saw several tour operators commence new summer/fall itineraries.

Tourism Yukon's strategic approach for Japan includes efforts to: grow winter aurora market share; develop summer/fall product with Canadian based RTOs and Japan-based tour operators; and to leverage opportunities from Destination Canada's in-market programs *Team Canada* and *Canada Theatre*, promoting awareness and travel to Canada for the nation's 150th birthday in 2017. Tourism Yukon will maintain in-market representation in Japan and a Japanese-language website.

Market Outlook

- Several established Yukon suppliers are currently in the market actively targeting the Japanese travel trade.
- The Yukon has strong national and global competitors for visitors seeking aurora tours, as this remains a core product for Japanese travelers.
- Yukon is well-served by increased air access from Japan to Vancouver from Narita, Tokyo-Haneda and Osaka-Kansai airports.
- 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.
- Tourism Yukon will continue to work to establish more awareness and differentiate the Yukon as an aurora viewing destination, as well as build awareness of fall and summer season offerings focusing on outdoor nature activities.
- In 2015-16 Tourism Yukon was part of a core partnership with Destination Canada's Japan office, *Canada Theatre*, which is designed to boost earned media and consumer awareness of Canada. In addition, it directly supports trade partners who develop new Canadian itineraries. In the first year of the program, tour operators developed several new Yukon itineraries that show promise for growth.

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- Tourism Yukon participates in the *Team Canada* partnership program in Japan that supports travel trade education and financial incentives for tour packages. This program will be combined with *Canada Theatre* for 2016-17.

Key Initiatives

- Partner with Destination Canada's Japan office on the *Canada Theatre / Team Canada* program for 2016-17. Special attention will be paid this year to leverage the upcoming 150th anniversary of Canada in 2017.
- Support travel trade in Japan and at Vancouver based Receptive Tour Operators (RTO's) with one-off promotional opportunities that arise.

08. EMERGING MARKETS

NETHERLANDS (BENELUX)

Market Overview

The Netherlands is not a large market overall, but visitation has remained consistent over the past several years. However, strong Canada demand in the market and the favourable exchange rate versus the Euro, coupled with an increase in demand for Yukon products among tour operators, heightened media interest (particularly television), and a strong product-to-market match, make the Netherlands (Benelux, i.e. Netherlands, Belgium, and Luxembourg) a market of increasing importance for Tourism Yukon.

Tourism Yukon investment in the Netherlands (Benelux) will be maintained at the current levels in 2016-17, as the market is responding to the increased promotional activity. Air Canada's new flight from Amsterdam to Toronto in 2015 and a new direct year round flight to Edmonton being operated by KLM (Air France), an improving economy, and an increase in the amount of Yukon product being carried in the market suggests an increased market share for the Yukon in 2016-17.

Market Outlook

- 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 Yukon is well-positioned to take advantage of this trend.

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- The Dutch travel trade is well established; there are some 50 companies offering Canadian tourism products.
- The Yukon enjoys good one-stop air access from the Netherlands via Vancouver, Calgary, and Edmonton.
- Outbound travel from the market to the Yukon 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.
- Efforts in 2015 to grow the amount of Yukon products being carried in the market are yielding new opportunities. Tourism Yukon hosted a Dutch trade familiarization tour held in Sept. 2015 that resulted in a considerable amount of new product being offered by key accounts in the market.
- The work being done by Tourism Yukon's in-market sales representative is yielding new promotional opportunities with both the trade and media.

Key Initiative(s)

- Efforts will focus on media relations initiatives in 2016-17 to take advantage of opportunities with leading travel magazines, Columbus and National Geographic Traveller.
- We will also explore an emerging opportunity to develop the MICE market from Belgium.
- Develop and deploy a new Dutch language consumer interface for TravelYukon.com that highlights Dutch tour operators carrying Yukon tourism products in the market.
- Deploy a new travel trade website to engage new and existing tour operators
- Deploy a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.
- Attract top-tier travel print & electronic media by capitalizing on the 100th anniversary of Jack London's death in 2016 and the 75th Anniversary of the Alaska Highway and the 150th Anniversary of Canada in 2017.

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- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.

FRANCE / French-speaking Europe

Market Overview

Although the French market has seen relatively consistent visitation and a relatively consistent 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 front line supplier level, and Tourism Yukon enjoys an excellent relationship with L'Association Franco-Yukonnaise. New French-speaking tourism products here in the Yukon, improving air connectivity through Vancouver, and the strong support of Destination Canada in France enhance the Yukon's potential in the market.

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 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.
- In partnership with Tourism Yukon, L'Association Franco-Yukonnaise (AFY) 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 continue to invest in the partnership with L'AFY to implement a marketing campaign targeting trade and media in the French-speaking European market in 2016/17.
- Develop a new travel trade website to engage new and existing tour operators
- Develop a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.

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- Attract top-tier travel print & electronic media by capitalizing on the 100th anniversary of Jack London’s death in 2016 and the 75th Anniversary of the Alaska Highway and the 150th Anniversary of Canada in 2017.
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.

CHINA

Market Overview

Bounding economic growth and outbound travel over the past five years recently placed China as Canada’s highest overseas growth market. Visitor arrivals to Yukon have been included in the sustained increase of Chinese visitors to Canada. Although the Chinese economy and overall growth rates have slowed significantly in 2015 compared to years previous (eg, a mere 6% growth compared to rates as high as 30% in 2014), the outlook for future visitation from China is still very strong, on the basis of sheer volume alone. With literally millions of wealthy and middle class travelers interested in Canada, Yukon stands to gain. Tourism Yukon has worked over the past three years to make strides in what many consider to be the world’s most dynamic economic opportunity.

The Department’s market development activities in China will continue on the basis of continued funding from the Yukon Now program. Sustained investment is required to work in partnership with Destination Canada’s China office, which can leverage their strong brand; innovative content and marketing programs; established media and trade networks; and engagement on market-specific web and social media platforms. This annual partnership allows Tourism Yukon to build profile in China beyond the scope of current in-house staff resources.

Market Outlook

- The “China market” is not one entity but rather multiple sub-markets of Chinese speakers. Tourism Yukon’s activities currently focus on building visitation from Mainland China’s Tier 1 cities. This group is well-travelled, English speaking, accustomed to non-Chinese cultures and inclined to engage in FIT travel.
- Increased air access into Canada (particularly Vancouver and Calgary) presents significant opportunities to position the Yukon as an attractive destination.
- Overall awareness of Yukon is fairly low among both consumers and travel trade. However, there has been noticeable momentum for trade recognition of Yukon aurora viewing product.

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- Tourism Yukon’s activities in 2016-17 will continue to emphasize marketplace participation, industry support, and receptive tour operator relations.
- Opportunities exist to grow travel year-round, including: aurora viewing, culture, soft adventure, wildlife viewing, and self-drive. Niche tours such as Dempster Highway tours that cross the Arctic Circle are proving popular. High-end, luxury travel experiences also appeal to Chinese travellers.
- A key motivator for specific travel destinations or products includes advising friends and family of their experiences.
- To capitalize on growth opportunities, Yukon’s tourism industry’s capacity to market to and accommodate high volumes of Chinese visitors must be considered. Examples of this include:
 - Engagement on Chinese consumer marketing platforms / social media (e.g., 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

Key Initiatives

- Facilitate education for Canadian-based Receptive Tour Operators (RTOs) to encourage increased attention on Yukon product development opportunities.
- Collaborate with other Canadian destination partners to leverage a “Plus Yukon” add-on approach that encourages trade partners to create dual-destination itineraries.
- Maintain the Tourism Yukon-branded Mandarin-language website (travelyukon.cn) and Weibo social media channel with measured content engagement.
- Partner with Destination Canada in China to present the Yukon in its marketing programs. These will include a consumer awareness-building initiative complemented by financial support for select trade partners selling the Yukon.
- Explore the potential for a targeted media outreach.
- Explore securing an in-market sales resource solution to capitalize on growth potential.
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.
- Utilize the China Working Group Committee to refine strategies and inform future marketing tactics.

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09. MONITOR MARKETS

SOUTH KOREA

Market Overview

After experiencing relatively low visitation and little attention from tour operators for a number of years, in 2013-14 Tourism Yukon downgraded South Korea's status from an Emerging Market to a Monitor Market. However, in the past two years, South Korea has been one of Destination Canada's fastest growth markets for visitation. Acting on a few selective media and trade projects in partnership with Destination Canada's Korea office has yielded strong results for the Yukon. These initiatives have helped to build interest for Yukon among several travel trade partners, in tandem with growing awareness and interest among Korean consumers, particularly for aurora viewing product. These developments have prompted attention be turned once again to this market. Limited funds are available for this market but Tourism Yukon will seek to implement low-cost/high reward initiatives where possible to respond to and support this recent momentum.

Market Outlook

- Sustained upswing in market numbers to Canada as reported by Destination Canada; year-over-year growth of approximately 15 per cent.
- This market consists of two key segments: 1) senior travellers seeking group activities and preferring traditional foods and in-language services; often celebrating a concept known as "Remind Honeymoon"; and 2) dramatically increasing FIT travel among young (under 35) travellers eager for new and active experiences.
- According to Destination Canada, South Koreans are some of the highest spending consumers among Canada's visitors, with a keen desire for shopping.
- As one of the most overworked populations among OECD countries, South Koreans seek rest, relaxation, pampering, and nature / personal space while on vacation.
- Consumer interest in winter aurora viewing product is increasing, stemming from some media exposure in recent years.
- Although overall awareness of Yukon as a travel destination is low, the Yukon is making strides as an aurora viewing destination as the result of several key media/trade partnerships in 2015.
- Self-drives and summer soft adventure are also areas of growth opportunity in this market.

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- Blogs are one of the strongest influencers of destination choice amongst travellers in South Korea and this platform should be leveraged. Furthermore, South Koreans' social media and mobile use is among the highest in the world.
- South Korea has good air access to the Yukon through Vancouver, and is also supported by flights into Seattle packaged with coach transfers to Vancouver.
- FIT travel presents the best opportunity for the Yukon, but group travel will be important to raise overall awareness of the destination in the market.

Key Initiatives

- Participate in Focus Canada Korea 2016, Destination Canada's in-market roadshow, to raise awareness among travel trade
- Host one blogger familiarization tour as part of Destination Canada Korea's successful SNS media influencer program
- Support tour operators and receptive tour operators focusing on Yukon sales
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.

MEXICO

Market Overview

While Mexico is still classified as a monitor market, visitation levels to the Yukon have now surpassed the pre-Visa requirement established by the Canadian Government in the mid 2000's. Yukon tourism industry suppliers report good numbers of Mexican travelers visiting the Yukon over this past winter. We will continue to monitor this market, support Yukon suppliers/operators active in the Mexico and work with Canadian-based receptives targeting Mexico. As indicated in the 2015-16 plan we are gradually increasing our activity and investment in the market as visitation continues to grow. Consideration should be given to moving this market to Emerging Market status in future following the next Market Program Assessment.

Market Outlook

- In 2014, changes in the visa requirement made it easier for Mexicans to travel to Canada, and the number of visa approval increased drastically. Destination Canada predicted a 100% increase in the number of Mexican visitors to Canada in 2015 versus the previous 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

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strategy focused in targeting the travellers' path to purchase through an appeal to buy travel to 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 travelling to the Yukon are specifically interested in aurora viewing and experiencing winter offerings in the snow. Many travel to the Yukon as part of a larger Canadian vacation that includes skiing and shopping in Western Canada.
- Several Yukon-based tour operators have reported an increase in the numbers of travellers to the Yukon over the past year and a scaling up of their own activities in the market, supporting the increase in investment by Tourism Yukon in 2016-17.

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.
- Consider participating in *#Next Travel Trade Exchange* given that Conozca Canada will no longer be held in 2016.
- Partner with Destination Canada Mexico in a co-op marketing campaign.
- Develop a new travel trade website to engage new and existing tour operators.
- Develop a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.

BRAZIL

Market Overview

Yukon tour operators report some growth in visitation from Brazil in 2015-16, 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

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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 active media relations/PR work 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.

Key initiatives:

- Develop and continue to maintain strong relationships with Canadian-based RTOs who are active in the Brazil market and support these RTOs through training, resources, co-operative marketing and FAM tours.
- Partner with Destination Canada to host a Brazilian television crew in Feb. 2016
- Deploy a new travel trade website to engage new and existing tour operators
- Deploy a new media website to provide compelling story theme ideas, video and still photography content to broaden the awareness of Yukon travel experiences and related products, to entice top flight media to provide unpaid (earned) coverage for the Yukon.
- Provide new sharable video and still photography content to tour operators to broaden the awareness of Yukon travel experiences and related product among their target clientele.

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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.

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11. TOURISM MARKETING BUDGET 2011/12 – 2016/17

The Tourism Yukon marketing budget for the past five years included in the 2016-17 Marketing Plan provides a snapshot of Tourism Yukon’s relative investments in its target markets. 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. Every 2-3 years, Tourism Yukon implements a Marketing Program Assessment (MPA), to review investments in all markets against key indicators and to evaluate our market classifications to ensure that these investments are providing the best return to the industry.

Marketing	2011– 2012	2012– 2013	2013– 2014	2014– 2015	2015– 2016	2016 – 2017
GLOBAL MARKETING OPERATIONS						
Marketing Operations	156,000	163,000	175,000	198,000	193,000	248,000
Brand/Image	150,000	180,000	160,000	125,000	120,000	170,000
Yukon Convention Bureau (YCB)	200,000	200,000	200,000	200,000	200,000	200,000
Sport Tourism (Sport Yukon)	43,000	43,000	43,000	43,000	43,000	43,000
Destination Canada EQ License					25,000	25,000
SUBTOTAL – Global Marketing Operations	549,000	586,000	578,000	566,000	581,000	686,000
NORTH AMERICA						

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Marketing	2011– 2012	2012– 2013	2013– 2014	2014– 2015	2015– 2016	2016 – 2017
Consumer Marketing – Operations	170,000	114,000	123,000	155,000	134,000	103,000
YukonNOW – Consumer					1,505,000	1,150,000
Destination Yukon (CAN)	646,000	720,000	620,000	650,000	600,000	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	
SUBTOTAL – North America	2,005,000	2,027,000	1,885,000	1,937,000	3,457,000	TBD
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						

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Marketing	2011– 2012	2012– 2013	2013– 2014	2014– 2015	2015– 2016	2016 – 2017
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

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12. TOURISM YUKON MARKETING UNIT

February 2016

Robin Anderson

A/Senior Manager, Global Marketing
Market Manager, Europe / UK

Jessica Ruffen

Market Manager, Asia-Pacific

Jim Kemshead

Marketing Specialist, Media and Public Relations

Emily Sheff

Marketing Specialist, Content (Term)

Annie-Claude Dupuis

Marketing Specialist, Trade, Americas

Katia-Annik Torkia

Marketing Specialist, Consumer

Stephen Reynolds

Digital Marketing Strategist

Michelle Wieser

Marketing Specialist – Digital Content

Sheena Greenlaw (Casual)

Digital Content Assistant

Harmony Hunter (Casual)

Marketing Specialist, Channel Operations

Valerie Neufeld

A/Marketing Coordinator

(Note: Jennifer Glyka – Maternity Leave)