

Cultural Tourism Unleashing Yukon's Potential

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Where were you on July 13, 2014 when ...



Credit: Danilo Borges/Portal da Copa copa2014.gov.br

Discovery Saloon @ Atlin Inn



Unleashing Yukon's potential: Four ideas

- **Leverage existing arts and cultural experience to broaden Yukon's strategic marketing narrative**
- **Create new arts and cultural experiences to diversify, deepen and broaden the visitor experience, longer visits by more visitors**
- **First Nations create experiences that share knowledge, protocols, traditions, contemporary ways of life with visitors and Yukoners**
- **YG tourism marketing showcases Yukon arts and cultural resources and talent including First Nations in its advertising, marketing and promotions**



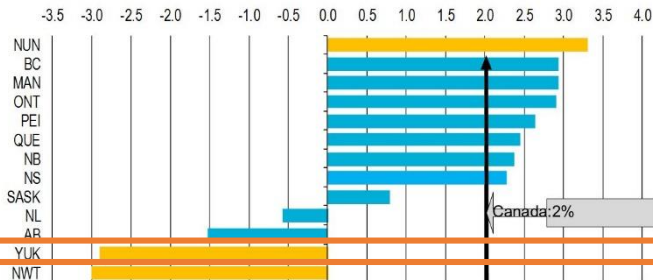
The Big Picture



Yukon poised to lead country in growth

2015 Real GDP by Province.

per cent change, basic prices, \$2007.



Sources: The Conference Board of Canada; Statistics Canada

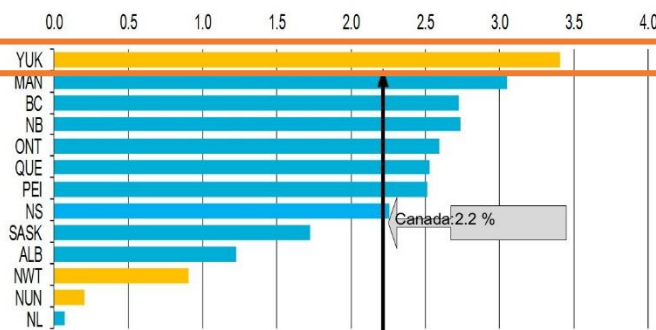


The Conference Board of Canada

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2016 Real GDP by Province.

per cent change, basic prices, \$2007.



Sources: The Conference Board of Canada; Statistics Canada

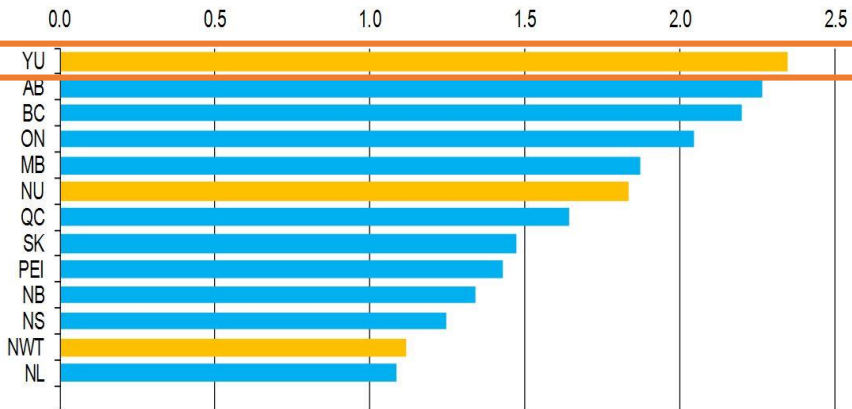


The Conference Board of Canada

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10-Year Average Real GDP Growth 2015-25

per cent, \$2007.



Sources: The Conference Board of Canada; Statistics Canada



The Conference Board of Canada

37

Unemployment rate to drop from mid 4% to mid 3% over next 5 years; after high of 7% in 2012.

Strengths

- **Service sector will continue to perform well, thanks in part to a growing tourism industry**
- **Public sector will keep economy moving with high level of capital spending**

Challenges

- **Mining cut backs and delays**
 - ~ 1 in 5 workers commute to Yukon for work
- **Construction flat**
- **Ageing population to put pressure on labour market and health care over next decade**

Yukon tourism favoured

Strong influence

- **Lower Canadian dollar has strong correlation to increased travel**
 - Makes visiting Canada cheaper, especially for USA
 - Keeps Canadians at home due to rising costs abroad
- **Increase in Yukon tourism marketing**
- **Improved air access from Ottawa and Kelowna**
 - Eastern Canada access

Little influence

- **Lower oil price**
 - Not considered as significant as savings are usually taken as gross profit by business
- Lower gas prices make driving more affordable, but not compared to Southern gas prices

Yukon attracts 12x its population

- **Highest proportion in Canada**
- **443,000 visitors to Yukon in 2014**
- **Border Crossings**
 - Europe up 9%
 - Asia/Pacific up 10%

Border Crossings	2014
USA	222,084
Canada (ex/Yukon)	33,134
Germany	8,955
Australia	7,709
UK	4,351
Switzerland	3,246
China	2,742
India	1,327
New Zealand	1,323
Netherlands	1,226

Tourism is largest private sector employer

■ Tourism sector

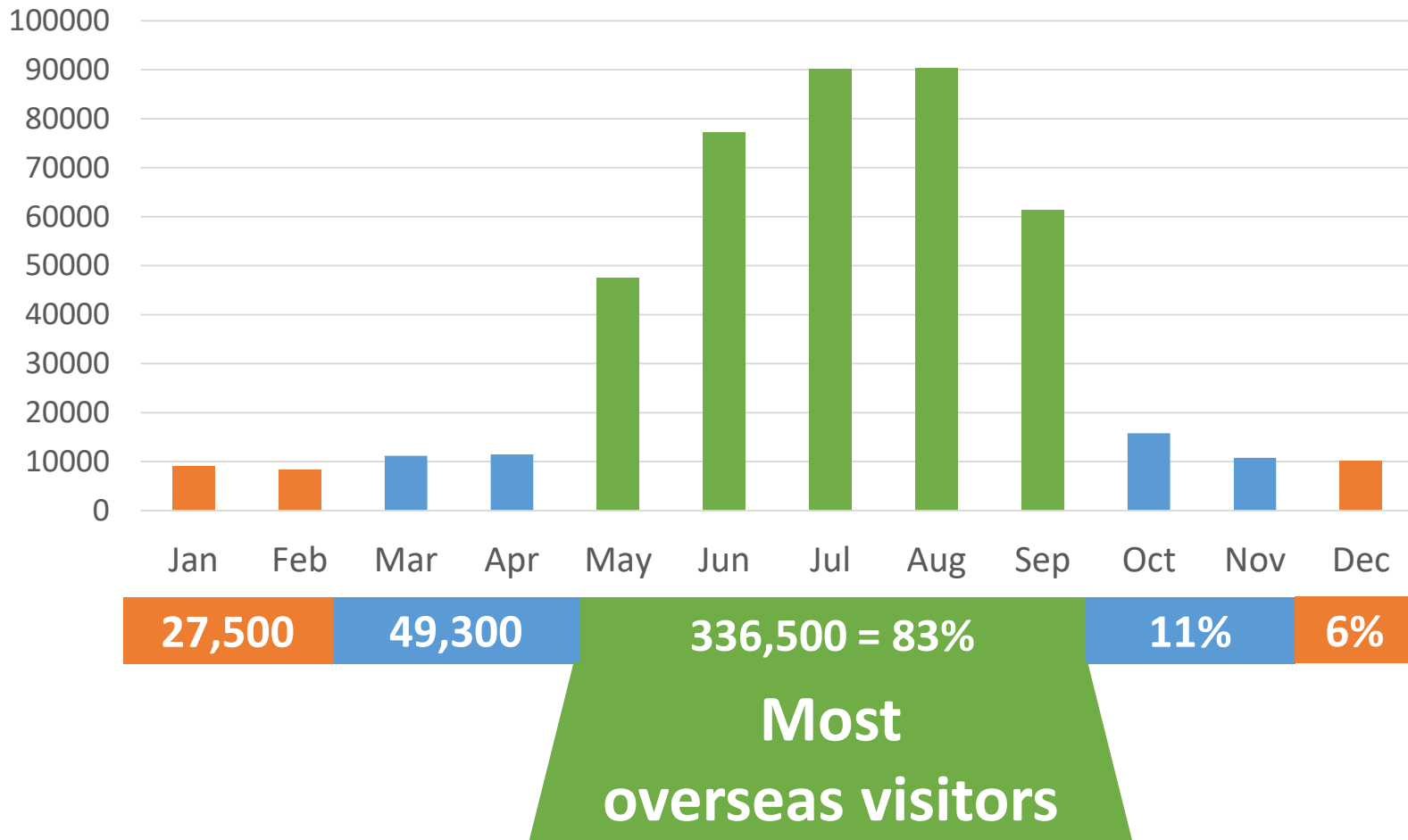
1. Accommodations
2. Food and beverage
3. Transportation
4. Adventure tourism
5. Wildlife viewing and recreation
6. Events and conferences
7. Travel trade
8. Attractions
9. Tourism services

■ Impacts other sectors



High season = summer

Yukon Monthly Visitors (2014)



The Opportunity

Cultural Tourism



Artists and cultural workers in Yukon

- **1,100 cultural workers = 4.6% of work force**
 - Highest proportion in Canada
- **1% of work force in three Territories who primarily work as artists**
 - Only BC has higher proportion at 1.1%



Arts and culture well supported

- **2009-10 per capita spending on culture was highest in Yukon**

	Canada	Yukon	Rank
Federal	\$123	\$552	2 nd / NWT \$888
Province / Territory	\$90	\$628	1 st / NU \$279
Municipal	\$87	\$13	12 th / SK \$103
Total	\$301	\$1,194	1st

2012-13 Yukon visitor segments

Visitors	Segment	Spend
29%	Authentic Experiencers	31%
19%	Cultural Explorers	28%
23%	Familiarity Seekers (3 segments combined)	16%
13%	Free Spirits	8%
9%	Historians (2 segments combined)	10%
7%	Rejuvenators	7%

Two high-yield segments together make up 48% of visitors and 59% of spend. Nationally, CTC focuses on these two and *Free Spirits*.

Profiles

■ Cultural Explorers

- Love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and places they visit.

■ Personality traits

- Open, accepting, non-traditional, enthusiastic, creative

Summer: 3 days / 7 Alaska

Winter: 8 days / 2 Alaska

■ Authentic Experiencers

- Look for authentic, tangible engagement with destinations, with a particular interest in understanding the history of the places they visit.

■ Personality traits

- Steadfast, understated, responsible, interested, rational

5 days / 6 Alaska

13 days / 2 Alaska



Most promising growth segments

- **Aboriginal tourism**
- **Cultural tourism**
- **Adventure tourism**

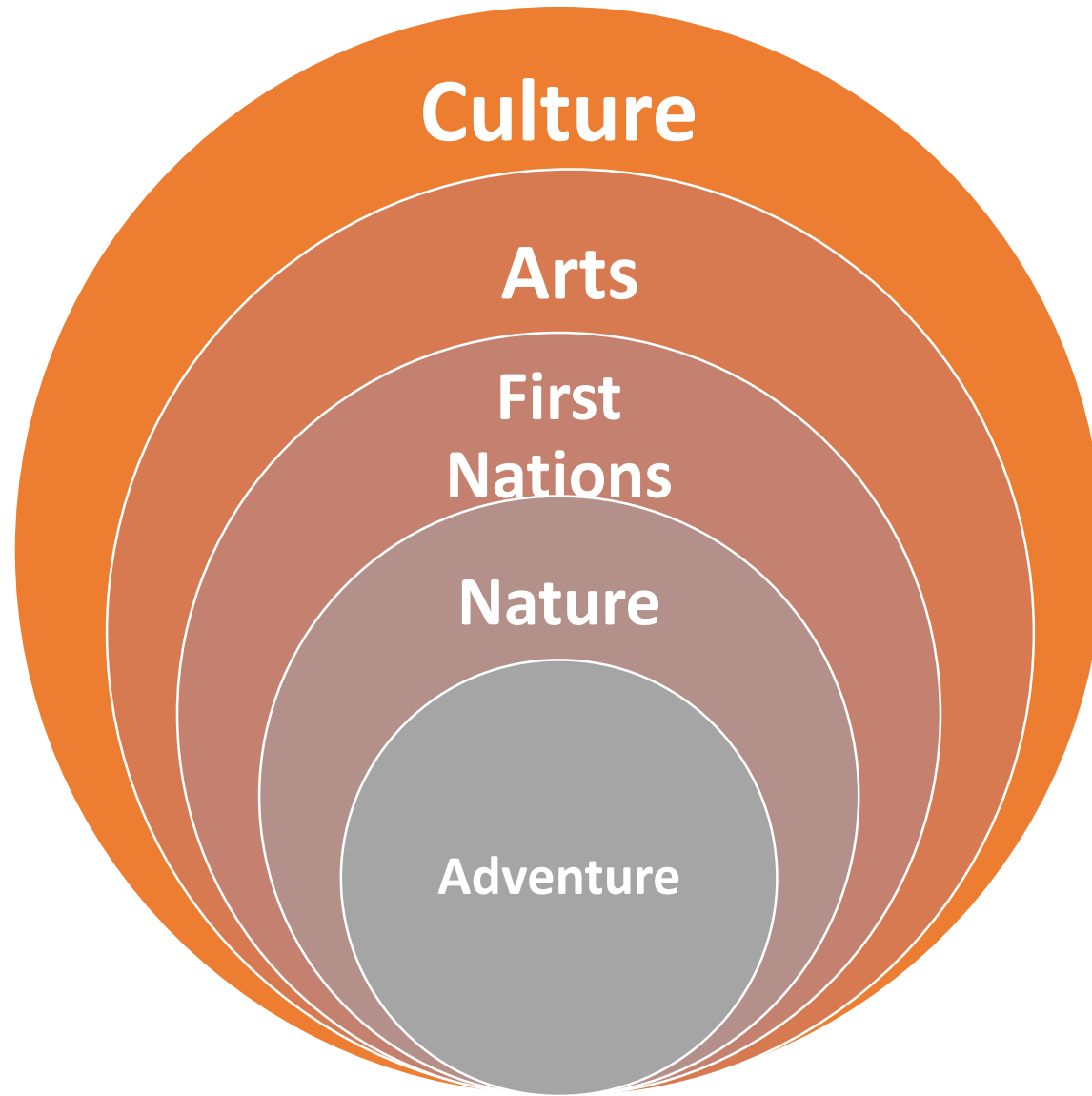


Cultural tourism

- **Performing Arts**
- **Visual Arts**
- **First Nations**
- **Festivals (film, music, theatre, etc)**
- **Museums**
- **Heritage**
- **Wine & Culinary**



Arts and Culture diversify, broaden and deepen appeal as tourism destination



Better Connecting Arts, Culture and Tourism

Exploring Ideas



Cultural tourism = Experience first

A tourism **product** is
what you **buy**.

A tourism **experience** is
what you **remember**.



How it works: Designing Experiences

- 1. What makes our community special (e.g. people, places, stories, traditions, activities)?**
- 2. What memories do we want our visitors to leave with?**
- 3. What traveller interests are aligned with what we have to offer?**
- 4. Who do I need to collaborate with to craft a relevant, engaging visitor experience?**
- 5. Which experiential programs exist, or could be developed, to form the foundation of a package or elements of a package?**
- 6. How can the experience be personalized?**
- 7. What unique, authentic and local treasures can be celebrated, showcased or engaged in?**

Idea #1:

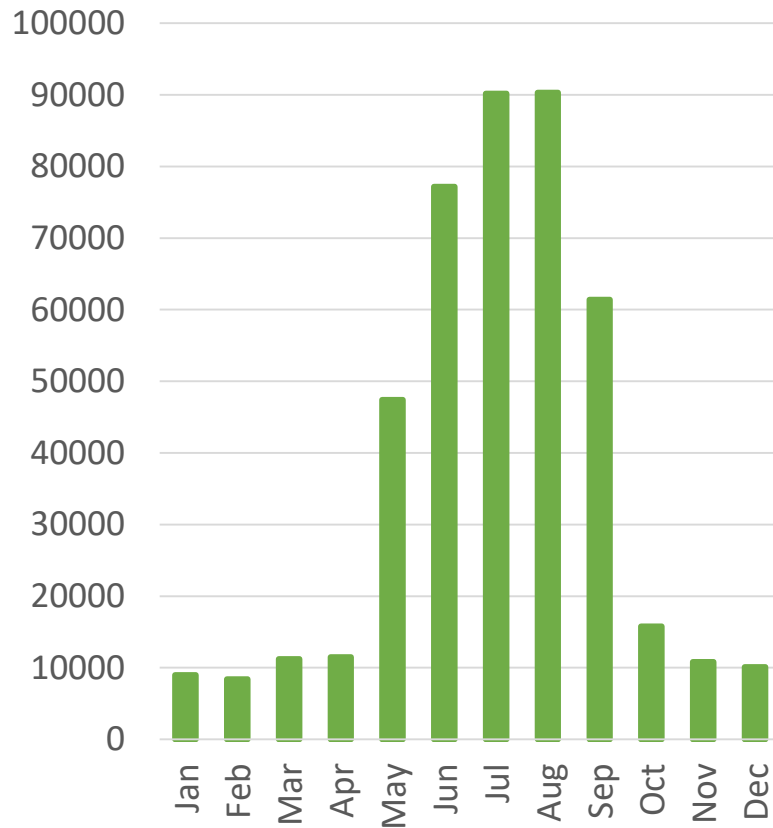
Leverage existing arts and cultural experiences to broaden Yukon's strategic marketing narrative

Encourage low season travel

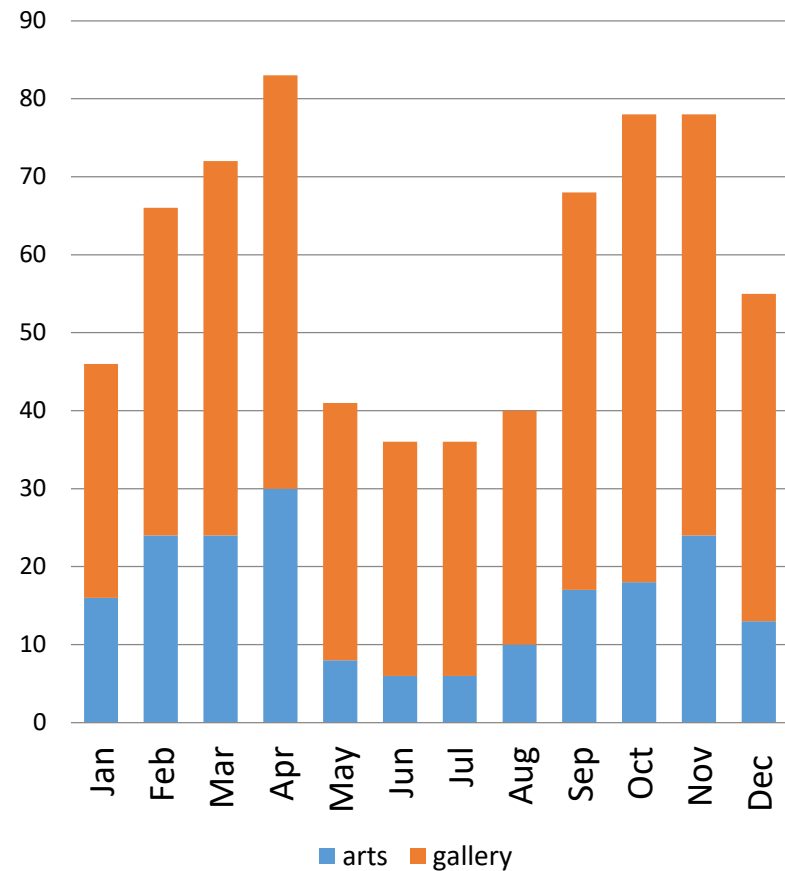


Most arts activity in low season

Yukon Monthly Visitors (2014)

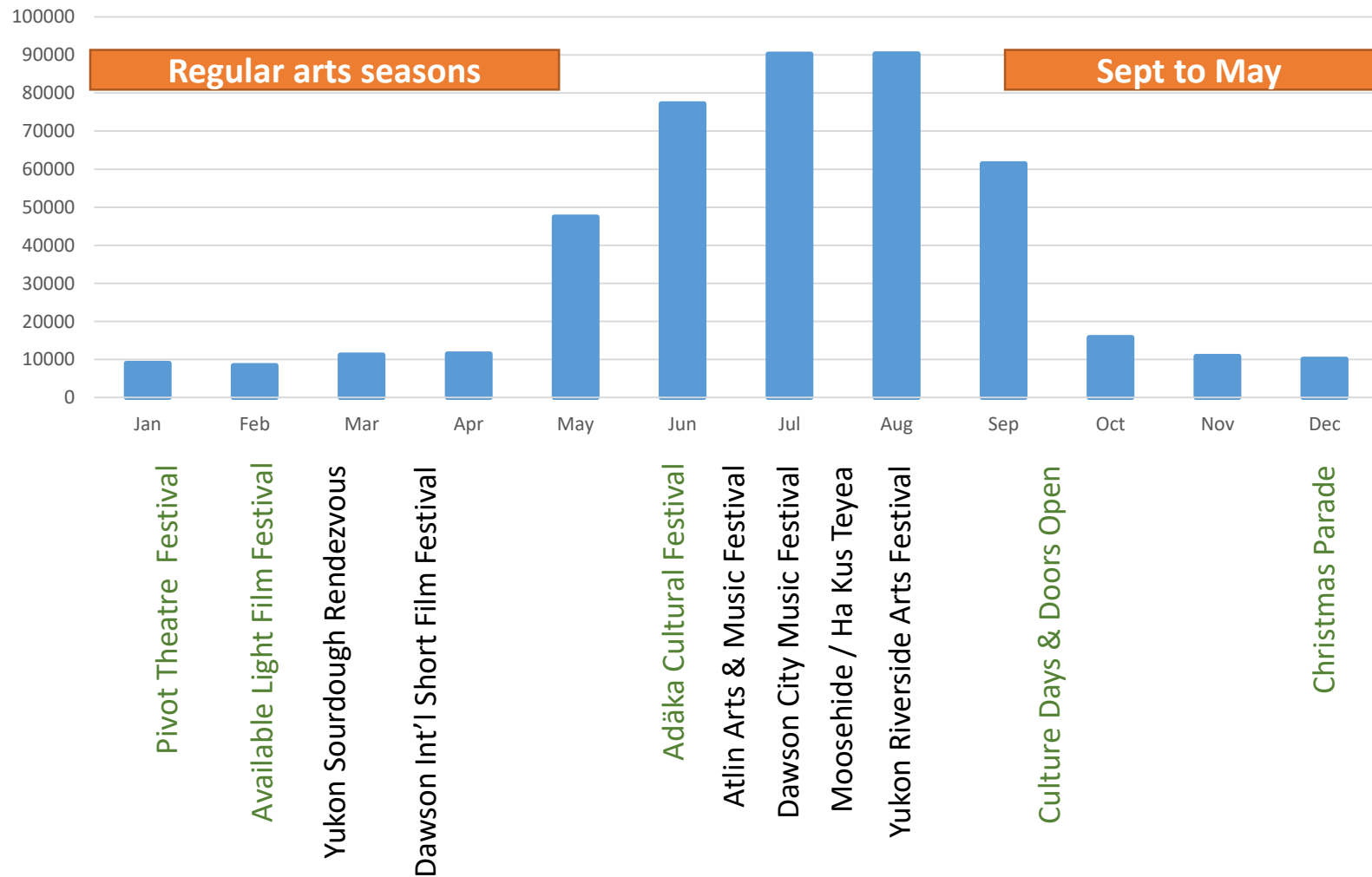


Arts and Cultural event days
(2014-15)



Festivals and regular seasons

Yukon Monthly Visitors (2014)



Arts events expand from “For Yukoners” to include Yukon visitors

Genre	Consider visitors
Performing Arts	Expand from touring artists to local and locally relevant
Visual Arts	Already focussed on local and locally relevant
Aboriginal	For visitors often correlates with outdoor activities, nature because they are unsure of staged cultural ‘demonstrations’. Many want to participate/learn rather than spectate.
Festivals (film, arts, music, theatre, etc)	Yukon already has unique ones – especially in winter – consider local relevance for visitors
Museums Heritage	From Beringia to the Klondike Gold Rush there are many visitor-friendly options
Wine & Culinary	Beer & Boreal

Considerations

- **Northern Lights have been focus of tourism marketing**
 - Highly competitive across Northern jurisdictions
 - Festivals, arts and culture have not been focus of tourism marketing
- **Yukon Culture is unique**
 - Need to hone tone and voice to represent culture in ways that resonate with Yukoners and First Nations
 - Enhance storytelling / place branding
- **Increasing winter travel means capacity to serve must be available**
 - Winter Experiences; Adventure travel
 - Flights, hotel rooms, transport

Idea #2:

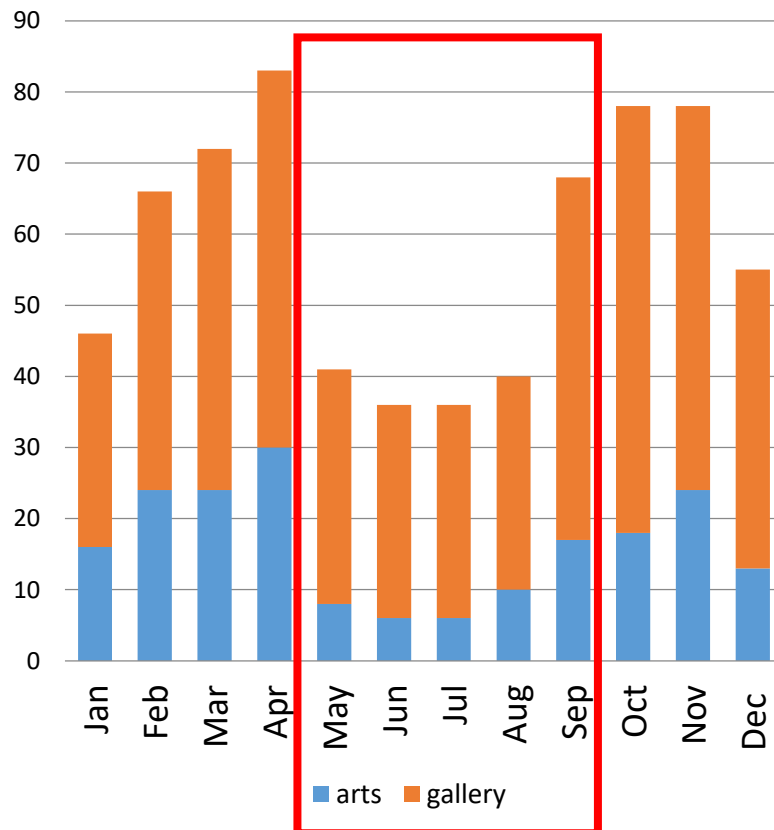
Create new arts and cultural experiences to diversify, deepen and broaden the visitor experience, longer visits by more visitors

New experiences for high season



Diversify, broaden and deepen

Arts and Cultural event days
(2014-15)



- **New performing arts events**
 - Experiences showcasing local talent
 - Yukon stories
 - Stories through the Yukon lens
- **New festivals**
 - Deepen visitors appreciation of Yukon performing arts, culture, creativity
 - Develop export opportunities for Yukon artists
- **Encourage longer visits**
- **Draw more visitors**

Considerations

- **What is the capacity in performing arts organizations, arts and cultural organizations to develop and produce summer programming**
 - Create tourist-friendly anchor events annually
 - Consider implications if local audiences aren't attending in summer
 - Collaborations with diverse communities and First Nations
- **What is the capacity for increased high season traffic re: hotel rooms, transport, flights, packages, guiding**
- **What are the implications for tourism marketing if increase in arts and cultural summer activities, options**



Idea #3:

To share First Nations knowledge,
protocols, traditions,
contemporary ways of life with
visitors and Yukoners

First Nations design experiences



What visitors seek

- **Aboriginal cultural experiences, celebrations and attractions are of great interest in key markets**
 - Generally low awareness of options so decisions are made while travelling rather than in advance
 - Have limited understanding of current Aboriginal cultures
- **Visitors seek authentic interactions; want to participate, learn, be active rather than passive consumers of entertainment or demonstrations**
 - Want active engagement through shared experience, discovery and adventure often centred on Aboriginal understanding and knowledge of nature; spirituality; different way of life.
 - Insecure about being spectators of cultural practices.



Leverage

- **Yukon First Nations self-government leads Canada**
 - More than half of all self-government agreements are in Yukon
- **First Nations arts and cultures and Canada's spectacular nature are nowhere more impressive than in the Yukon**
- **First Nations can lead design of tourism experiences that connect visitors authentically and with respect for protocols and traditions**



Considerations

- **First Nations Cultural and Heritage Centres serve first and foremost their citizens**
 - Cultural reclamation
 - Language revitalization
 - Skills preservation
- **Tourism is a valuable revenue stream, employer**
- **Actively integrate First Nations in all manner of tourism development rather than only First Nations cultural expressions**



Idea #4:

**YG tourism marketing showcases
Yukon arts and cultural resources
and talent including First Nations
in its advertising, marketing and
promotions**

Policy Opportunity



YG tourism investment has leverage

- **Build up the Yukon voice and personality**
- **Tell contemporary Yukon stories**
- **People first**
 - Arts and culture experiences
- **People first**
 - Adventure, wilderness, outdoors
- **Production and post-production teams**
- **Talent**
- **First Nations integral**
- **Showcasing arts and culture**
 - Original music
 - Original art
- **Authentic experiences**





Get in touch

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