



INSTO

World Tourism Organization
International Network
of Sustainable Tourism
Observatories



Yukon Sustainable Tourism 2022 Annual Report



Foreword by the Minister of Tourism and Culture



A significant milestone was achieved in May 2022 when the Yukon became a member of the United Nations World Tourism Organization (UNWTO) International Network of Tourism Observatories. The Yukon is first jurisdiction north of 60° to have this status. This prestigious recognition is a testament to the territory's commitment to sustainable tourism practices. The implementation of the new Yukon Sustainable Tourism Framework played a pivotal role in earning this recognition.

Using the Yukon Tourism Development Strategy and the Yukon Sustainable Tourism Framework as our guides, core themes of sustainable practices, destination development, strategic marketing and innovation will keep moving the Yukon towards being a premier global destination. The collective efforts of stakeholders, governments, First Nation organizations and local communities will play a crucial role in realizing this vision for Yukon tourism.

The 2022 Yukon Sustainable Tourism Annual Report presents a comprehensive overview of the health of tourism in the Yukon, spanning from 2019 to 2022. Despite facing unprecedented challenges due to the COVID-19 pandemic and global uncertainty, the Yukon's tourism sector has shown remarkable resilience and innovation, positioning itself for growth and sustainable development in the years to come.

A handwritten signature in blue ink that reads "John Streicker". The signature is fluid and stylized, with a long horizontal flourish extending to the right.

John Streicker

Minister of Tourism and Culture
Government of Yukon



Government of Yukon, Department of Tourism and Culture

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Executive Summary

The 2022 Yukon Sustainable Tourism Annual Report for the Yukon serves as a testament to our dedication to sustainable tourism development. The impact of our commitment extends beyond our borders and encourages similar efforts in destinations across the globe.

This report outlines data on key elements of tourism that require annual monitoring by the United Nations World Tourism Organisation (UNWTO). Findings across these key elements are organized into five categories: people and culture; economy; governance and administration; resource management; and environment.

According to the UNWTO, achieving sustainable tourism is a continual process and it requires regular monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary. While the Yukon Sustainable Tourism Framework and this report do not result in a defined 'sustainability score', the efforts and intentions demonstrate the territory's commitment to sustainable and responsible tourism development.

Like many destinations, travel to the territory is quite seasonal with the majority of visitors arriving in the summer months. Summer is the peak tourism season in the Yukon given the more favourable weather, long daylight hours and milder temperatures. In summer 2022, there were more than 76,000 air arrivals and hotel occupancy rates averaged 76%, whereas hotel occupancy rates averaged 45% in the winter months. During 2022, international border crossings saw over 133,000 visitors travelling into the Yukon through our international road and air borders in the summer months and approximately 38,000 visitors in the winter months.

Regardless of season, visitors enjoy their time and experiences in the Yukon. We have a Net Promoter Score (NPS) of 81%, indicating that the majority of our visitors are likely to recommend the territory to their friends or colleagues as a must-visit destination. In addition, 61% of visitors expressed their intent to return to the Yukon. These scores reflect the appeal of the Yukon as a travel destination, making it an attractive choice for people seeking memorable and enriching experiences.



Measuring Yukoners' support for tourism ensures that the sector aligns with Yukoners' core values. 91% of Yukoners believe that tourism is good for the Yukon. This support demonstrates that Yukon residents value and appreciate tourism in their communities.

Unfortunately, but not surprisingly, the economic impact of the COVID-19 pandemic led to reduced travel, reduced consumer spending and a fall in consumer confidence. This contributed to a significant decline in tourism's contribution to the Yukon's gross domestic product (GDP) from 5% in 2018 to 2.2% in 2020. However, there are many encouraging signs of recovery.

Tourism played a pivotal role in the Yukon's employment landscape in 2019 with its contribution amounting to 9% of the total jobs within the territory. This data not only highlights the sector's significance, but also underscores its role as a major driver of the economy. The reliance on seasonal and part-time employment in the tourism sector has broader implications for the Yukon's economic stability.

The Yukon is fortunate to benefit from robust community and Indigenous engagement, as well as land use planning regimes and regulatory controls. These factors collectively support sustainable development.

Visitors often travel to the Yukon by air or road and the emissions associated with these modes of transportation can significantly contribute to the sector's greenhouse gas (GHG) footprint. Recognizing the importance of this environmental impact, a range of educational initiatives has been launched with the primary goal of increasing visitor awareness about the far-reaching implications of climate change in the Yukon.

Effective energy management plays a critical role in upholding sustainable tourism practices in the territory. It is a key approach to mitigate the environmental footprint associated with tourism activities while actively contributing to the preservation of the destination's natural beauty, rich culture, and natural resources. There has been a consistent upward trajectory in the adoption of renewable energy systems within tourism buildings and sites, reflecting a growing commitment to adopting sustainable energy management practices in the Yukon. Moreover, it's noteworthy that 11 out of



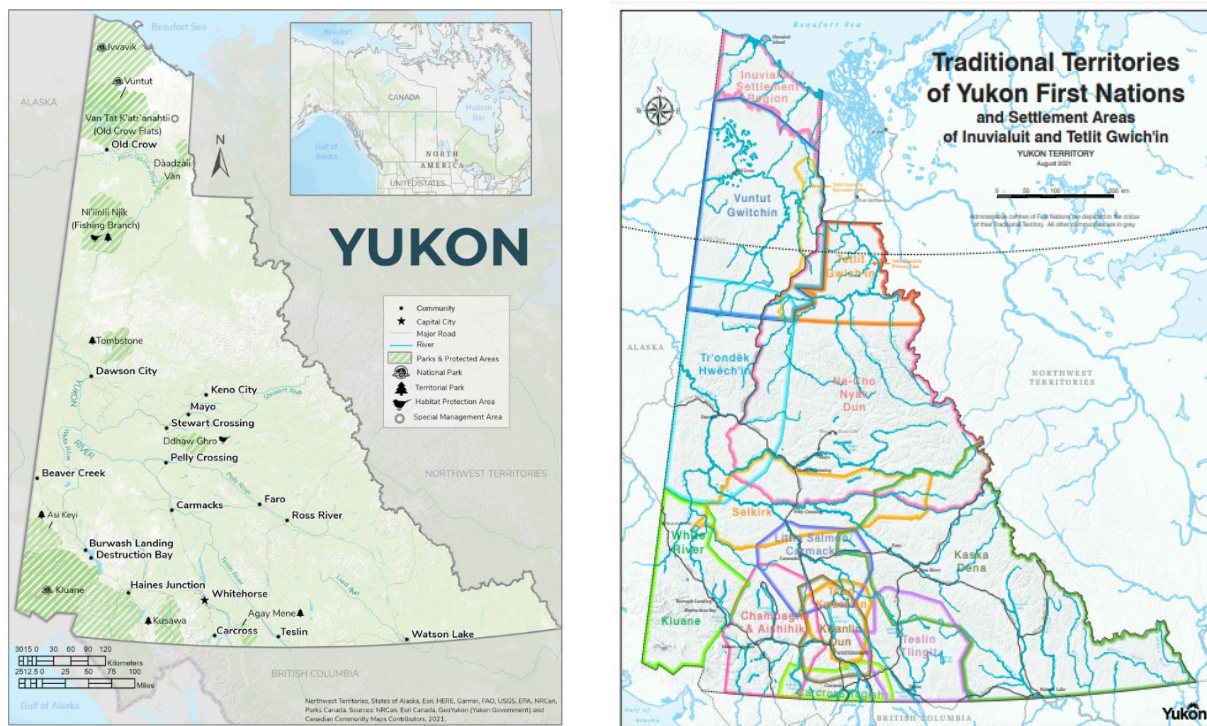
the 13 road-accessible communities in the Yukon can be reached using electric vehicles from Whitehorse, the capital of the Yukon.

While this report outlines data and insights for most of the Yukon's key elements of tourism, we know we require further information on solid and hazardous waste, wastewater, water, infrastructure and health and safety. We will sustain our efforts to work with experts to build our understanding of tourism-related impacts on all key elements.

Destination Profile

The Yukon is one of Canada's vast northern territories with approximately 483,450km² of land and enclosed waterbodies. Situated in the northwestern part of Canada, the Yukon shares its southern boundary with British Columbia and the western boundary with Alaska. The Beaufort Sea forms its northern coastline and the eastern boundary with the Northwest Territories follows the height of land between the Yukon and Mackenzie Rivers.

Figure 1: Yukon on the map



Source: <https://open.yukon.ca/fr/information/publications/first-nations-traditional-territories>

The Yukon has a population of 44,160 people¹ and is home to 14 First Nations whose traditional territories cover almost all the land in the Yukon. In terms of percentage share of GDP in 2020, the bulk of the Yukon's economy, at 23%, is comprised of activities of a governmental nature. The second largest industry in the economy is mining, quarrying and oil and gas extraction at almost 15%. While the Yukon also has a thriving tourism economy, the sector's contribution to GDP fell from 5% in 2018 to 2.2% in 2020, but is starting to rebound.

The Yukon's Approach to Sustainable Tourism

In 2018, the Government of Yukon's Department of Tourism and Culture (T&C) coordinated a Yukon-wide engagement process to develop a vision for tourism in which all Yukoners could see themselves. A Steering Committee was formed to provide strategic advice on the development of a multi-year, goal-oriented strategy. The result was the Yukon Tourism Development Strategy (YTDS). The vision is for tourism to be a vibrant, sustainable component of the Yukon's economy and society for the benefit of future generations.

Sustainable tourism development was identified as a key goal. Sustainable tourism development is defined as "tourism growth that supports healthy communities, preserves our natural environment for future enjoyment, and ensures tourism benefits Yukoners for generations to come."

To measure progress on this goal, T&C established the Yukon Sustainable Tourism Framework (YSTF), which outlines 17 key elements to be measured annually. The 17 key elements reflect:

- the vision, goals and actions outlined in the YTDS, which represents a community-based approach to tourism planning and development;
- alignment with the United Nations' International Network of Sustainable Tourism Observatories' (INSTO) framework (a global best practice in sustainable tourism monitoring);

¹ Population Report, Q3 2022 (Government of Yukon, Department of Finance, Yukon Bureau of Statistics)

- a flexible and collaborative approach to monitoring, communication of results and identification of priorities; and
- support from the Yukon Tourism Industry Association, the Yukon First Nations Culture and Tourism Association, the Wilderness Tourism Association of the Yukon, the Klondike Visitors Association, Sport Yukon, the Yukon Historical and Museums Association, and Destination Canada, Canada's national tourism authority.

Ten years of funding for framework establishment and implementation was secured through the Yukon government's *Our Clean Future (OCF): A Yukon strategy for climate change, energy and a green economy*.

In May 2022, the Government of Yukon officially launched the framework and became an INSTO member to access support and guidance with framework implementation. INSTO annual requirements² include:

- producing an annual report that is accessible to the public;
- holding an annual tourism stakeholders' workshop; and
- establishing a local working group to ensure continuous commitment to constant, regular and timely monitoring efforts.

The Yukon Sustainable Tourism Observatory

Goals and Objectives

The main goal of the Yukon Sustainable Tourism Observatory is to support sustainable tourism development in the Yukon. To achieve this goal, the main objectives are:

- coordinating the creation of knowledge on the state of the Yukon's tourism sector;
- recognizing the importance of local knowledge and perspectives by collaborating with local tourism organizations, governments, communities and others to

² There is no cost associated with INSTO membership.

identify, measure and interpret sustainable tourism conditions and identify sector priorities; and

- fostering tourism-sector awareness of sustainable tourism development by ensuring transparency and accessibility of YSTF data, key findings and INSTO network knowledge.

Sustainable Tourism Working Group

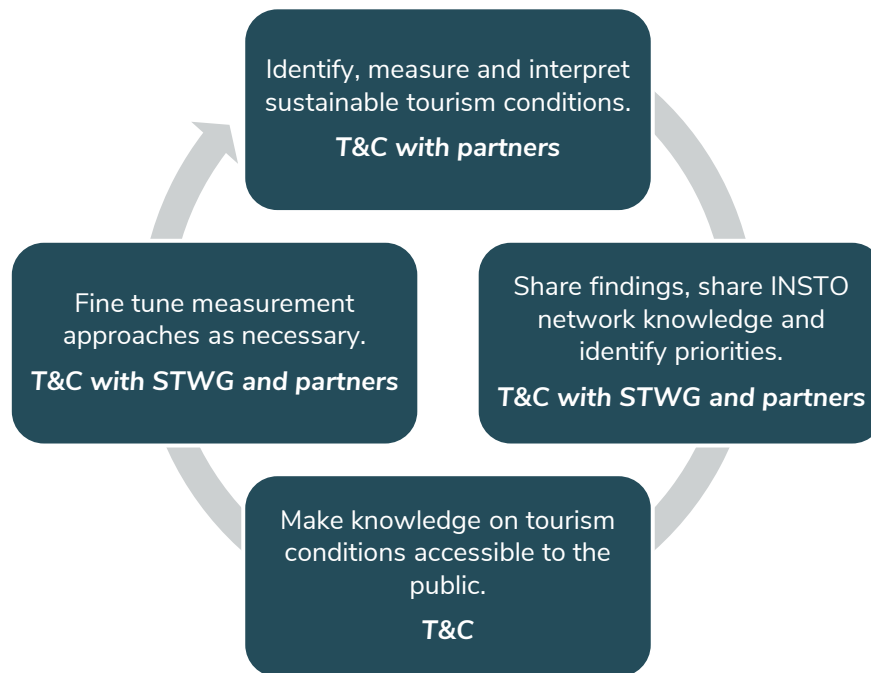
The Yukon's Sustainable Tourism Working Group (STWG) was established in the Fall of 2022. The group is currently comprised of 13 representatives from governments and organizations, including:

- The Champagne and Aishihik First Nations
- The Lake Laberge Renewable Resource Council
- The Council of Yukon First Nations
- The Yukon First Nations Culture and Tourism Association
- The Tourism Industry Association of the Yukon
- The Wilderness Tourism Association of the Yukon
- The Klondike Visitor Association
- Sport Yukon
- The Yukon Convention Bureau
- The City of Whitehorse
- The Government of Yukon

Representatives were selected based on their knowledge of, and experience with, the five categories of YSTF key elements: people and culture, economy, governance and administration, resource management, and environment. Representation from Yukon First Nations governments and organizations is important to ensure Yukon First Nations voices and perspectives are included in sustainable tourism implementation. The figure on the next page shows how YSTF objectives will be met through annual activities.



Figure 2: YSTF objectives



Key Elements

All key elements to be monitored by the Yukon Observatory, and their goals, are shown in the table on the next page. Monitoring goals were developed by T&C and are based on the YTDS, *Our Clean Future* and best practices in sustainable tourism management. These may change over time if deemed necessary by the STWG or others involved in framework activities and discussions.

Eleven of the 17 key elements are measured in this year's report. Findings across the key elements are organized into five categories: people and culture, economy, governance and administration, resource management, and environment. Notably, the water management, wastewater management, solid waste management, infrastructure and public health and safety key elements have little or no data or information at the time of publication of this report. Efforts are being made to address these gaps and continue the Yukon's efforts to move towards sustainability.



Table 1: Key categories, elements of sustainable tourism and monitoring goals

Category	Key Elements	Monitoring Goal
INSTO Key Elements		
People and culture	Resident sentiment	Alignment between sustainable tourism development and Yukoners' core values.
	Tourism seasonality	Year-round tourism that maximizes available capacity in the shoulder and winter seasons.
	Accessibility, inclusivity, equity, and diversity	Tourism contributes to accessibility, inclusivity, equity and diversity in the Yukon.
Economy	Economic benefits	A thriving tourism economy.
Governance and administration	Governance	Effective leadership and coordination across the Yukon's tourism sector.
	Employment and human resources	A diverse, skilled and experienced tourism-sector labour force.
Resource management	Energy management	Responsible and renewable energy use and management by the Yukon's tourism sector and visitors.
	Solid and hazardous waste management	Responsible management of solid and hazardous waste generated by the Yukon's tourism sector and visitors.
	Wastewater management	Responsible wastewater management by the Yukon's tourism sector and visitors.
	Water management	Responsible water use and management by the Yukon's tourism sector and visitors.
Environment	Climate Action	Sustainable tourism development that addresses climate action.
The Yukon's Key Elements		
People and culture	Cultural sustainability	Tourism benefits the Yukon's cultures, communities and heritage.
	Resident travel	Responsible resident travel.
	Visitor sentiment	Positive visitor sentiments towards the Yukon.
Governance and administration	Public Health and safety	Keep residents and visitors healthy and safe.
Resource management	Infrastructure	Resilient community infrastructure and access to and around the Yukon.
Environment	Natural environment	Tourism contributes to the stewardship and enjoyment of the Yukon's natural environment.

Note: Key elements not highlighted indicate a lack of known data sources or available data.



A. People and Culture

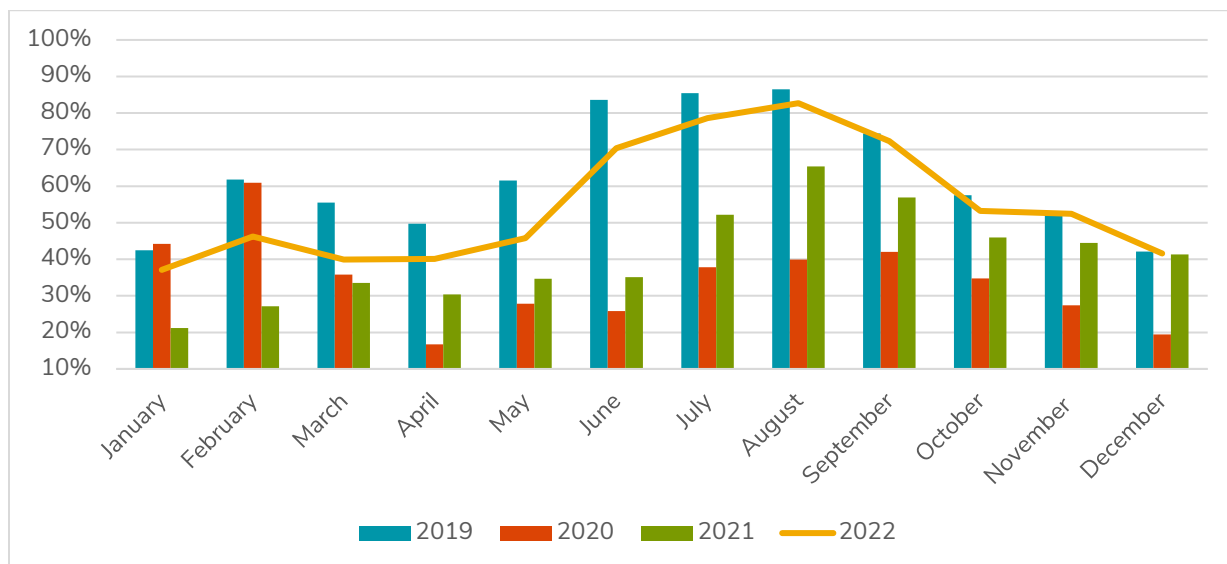
A.1 Tourism Seasonality

1: Occupancy rate (%), fixed roof accommodation

The occupancy rates of fixed-roof accommodations in the Yukon are shown below. In 2019, the annual average occupancy rate was 63%. Due to the COVID-19 pandemic, the rate fell significantly in 2020 and 2021, to 34% and 41%, respectively. The annual average occupancy rate rose to 55% in 2022.

In 2019, the occupancy rate averaged 85% during the peak summer season (June to August), compared to 77% in 2022.

Figure 3: Occupancy rate (%), fixed roof accommodation



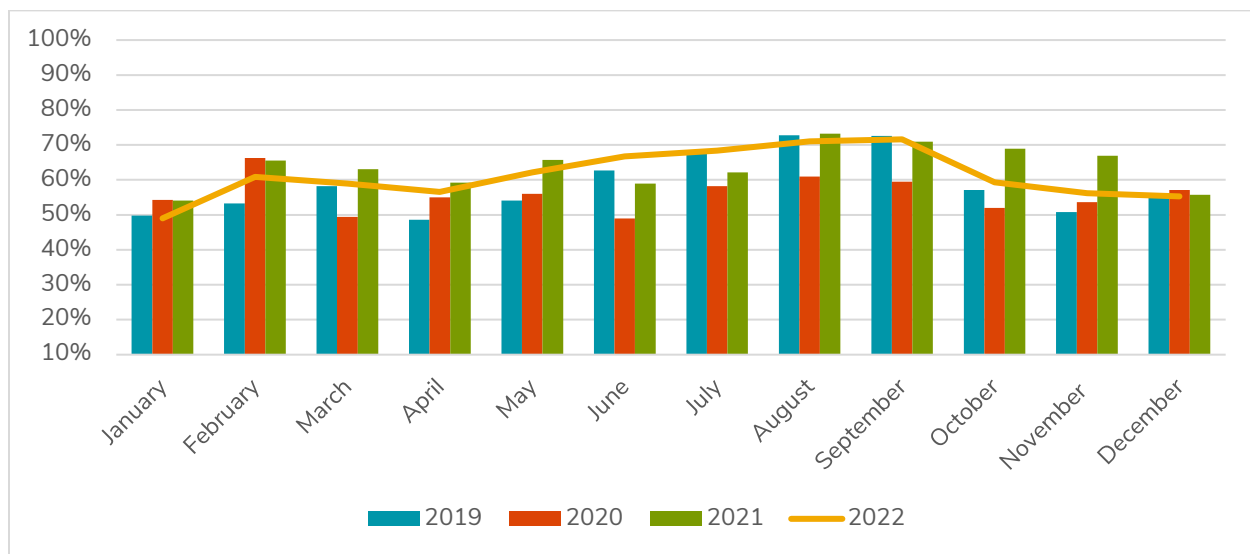
Source: CBRE

2: Occupancy rate (%), private rental accommodations (hotel comparable)

The annual average occupancy rate for private rental accommodations (hotel comparable) was 59% in 2019. In 2020, 2021 and 2022, the rates were 56%, 63% and 61%, respectively.

Across all the years, August consistently exhibited the highest occupancy rates within the May to September timeframe.

Figure 4: Occupancy rate (%), private rental accommodations (hotel comparable*)



Source: AirDNA

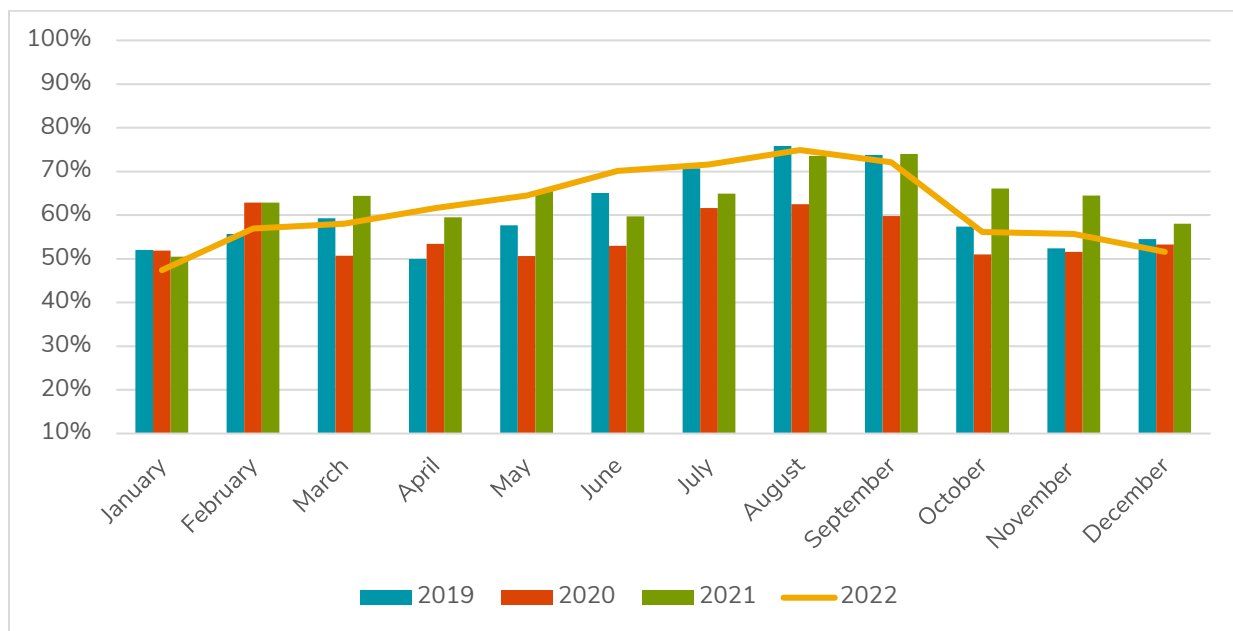
Note: *Hotel comparable properties are one bedroom and studio properties added together.

3: Occupancy rate (%), private rental accommodation (entire place)

The annual average occupancy rate of private rental accommodations (entire place) in 2019 was 61%. In 2020, 2021, and 2022, the rates were 55%, 63%, and 61%, respectively.

In general, there was a noticeable increase in occupancy rates from May to August, reaching the highest levels during this period. This was consistent across all the years analyzed.

Figure 5: Occupancy rate (%), private rental accommodation (entire place*)



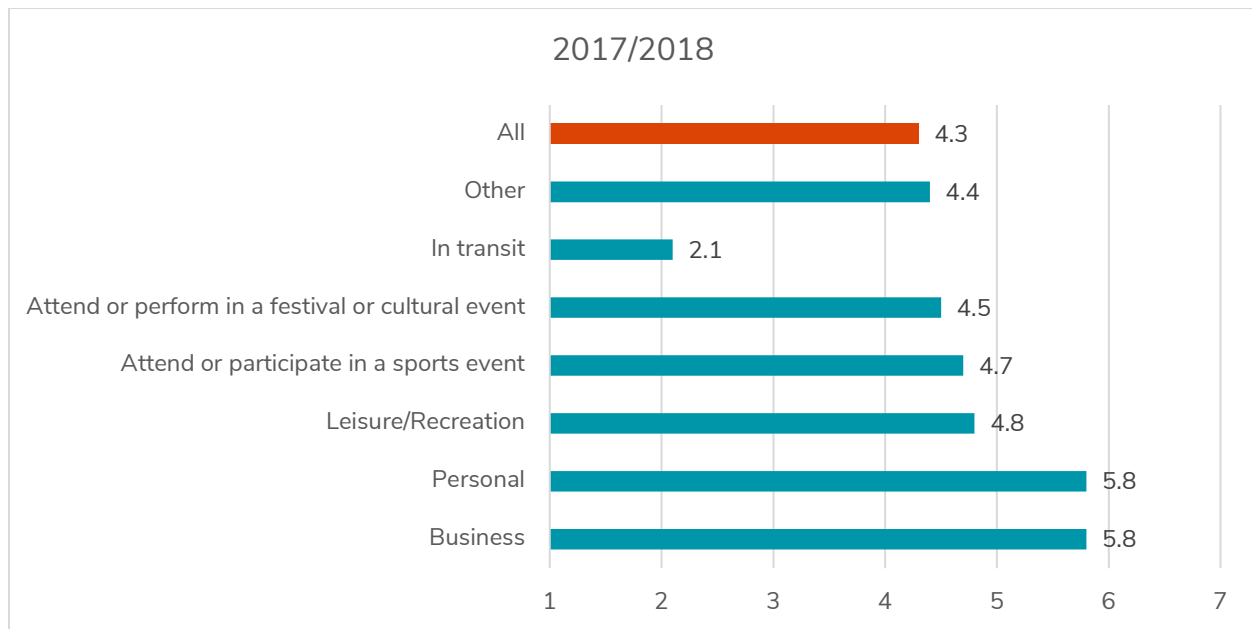
Source: AirDNA

Note: *Entire place are properties with private entrances and guests have the whole home to themselves.

4: Average length of stay (days), all visitors, 2017-18

The average length of stay for all overnight visitors was 4.3 nights. Visitors stayed longer (an average of 5.8 nights) if their main reason for visiting was personal or business. Visitor stays were shorter (an average of 2.1 nights) if they were in transit.

Figure 6: Average length of stay (days), all visitors



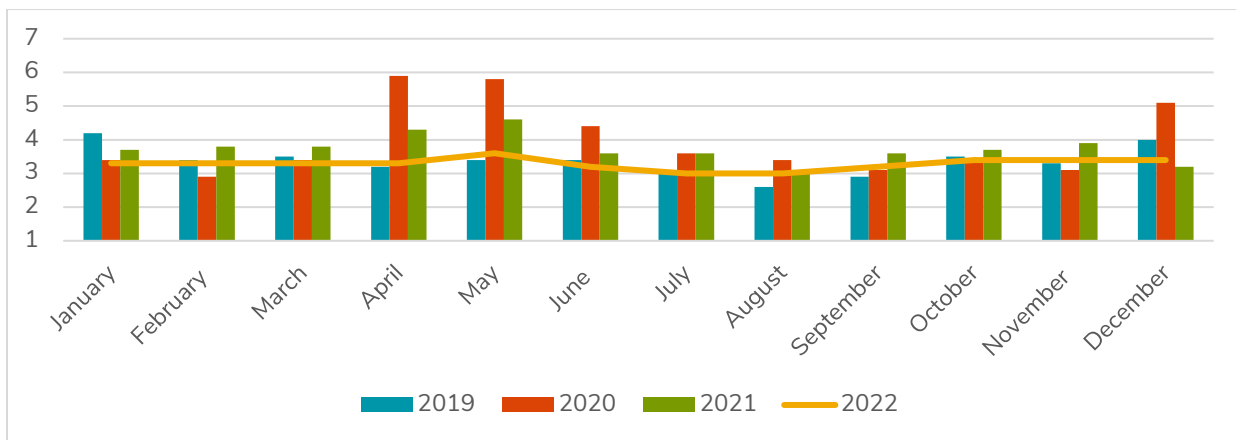
Source: Government of Yukon, Yukon Bureau of Statistics -Visitor Exit Survey 2017/18.

Note: 2017-2018 Yukon Visitor Exit Survey (VES) was conducted between November 2017 and October 2018. VES is conducted every five years.

5: Average length of stay (days), private short-term rental users (hotel comparable and entire place)

In 2019, private short-term rental users spent an average of 3.4 nights in hotel comparable units and 3.5 nights in entire place units. A sharp rise in the average number of days was observed in the months of April and May 2020, likely because of quarantine related restrictions. The month of December 2020 showed slight increased average number of days as compared to other years.

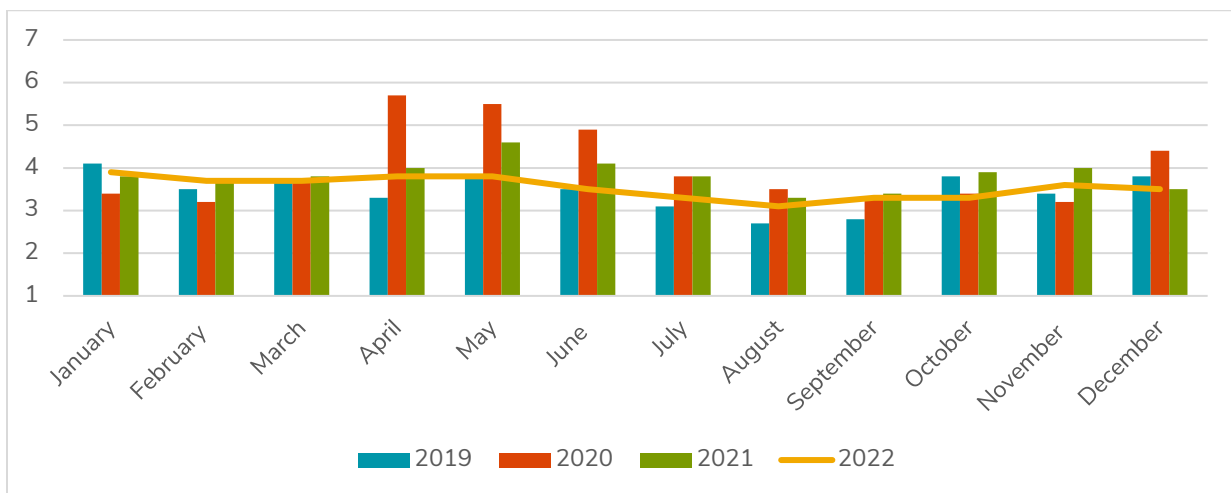
Figure 7: Average length of stay (days), private short-term rental (hotel comparable*)



Source: AirDNA

Note*: Hotel comparable properties are one bedroom and studio properties added together.

Figure 8: Average length of stay (days), private short-term rental (entire place*)



Source: AirDNA

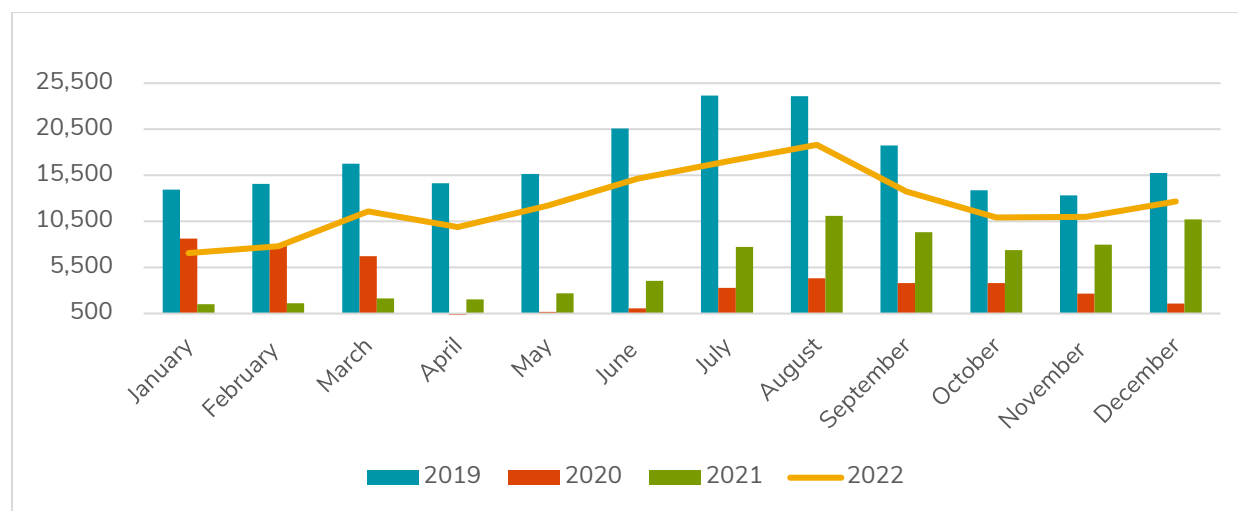
Note: *Entire place are properties with private entrances and guests have the whole home to themselves

6: Arrivals at Erik Nielsen Whitehorse International Airport

At the Erik Nielsen Whitehorse International Airport, there were just over 200,000 arrivals in 2019. There were 78% fewer arrivals in 2020. In 2022 there were 147,841 arrivals, which is 28% below pre-pandemic levels.

In 2019 and 2022, the summer months of July and August consistently exhibit the highest arrivals indicating a peak in travel and tourism during this period. The data shows some variability in arrivals during the winter months across the years. For instance, there is relatively higher numbers of arrivals in December compared to October and November across all years (except COVID-19), possibly due to activities such as winter sports, northern lights viewing, the holiday season and other winter attractions.

Figure 9: Arrivals at Erik Nielsen Whitehorse International Airport



Source: Government of Yukon, Department of Highways and Public Works

Note: Arrivals include visitors and residents

Table 2: Arrivals at Erik Nielsen Whitehorse International Airport

	January	February	March	April	May	June	July	August	September	October	November	December	Total
2019	13,949	14,564	16,778	14,657	15,636	20,598	24,165	24,099	18,754	13,882	13,331	15,764	206,177
2020	8,638	7,920	6,713	355	682	1,066	3,295	4,317	3,810	3,810	2,669	1,592	44,867
2021	1,517	1,617	2,142	2,023	2,702	4,044	7,731	11,083	9,331	7,399	7,961	10,710	68,260
2022	7,064	7,792	11,573	9,868	12,223	15,133	17,020	18,810	13,750	10,936	11,004	12,668	147,841

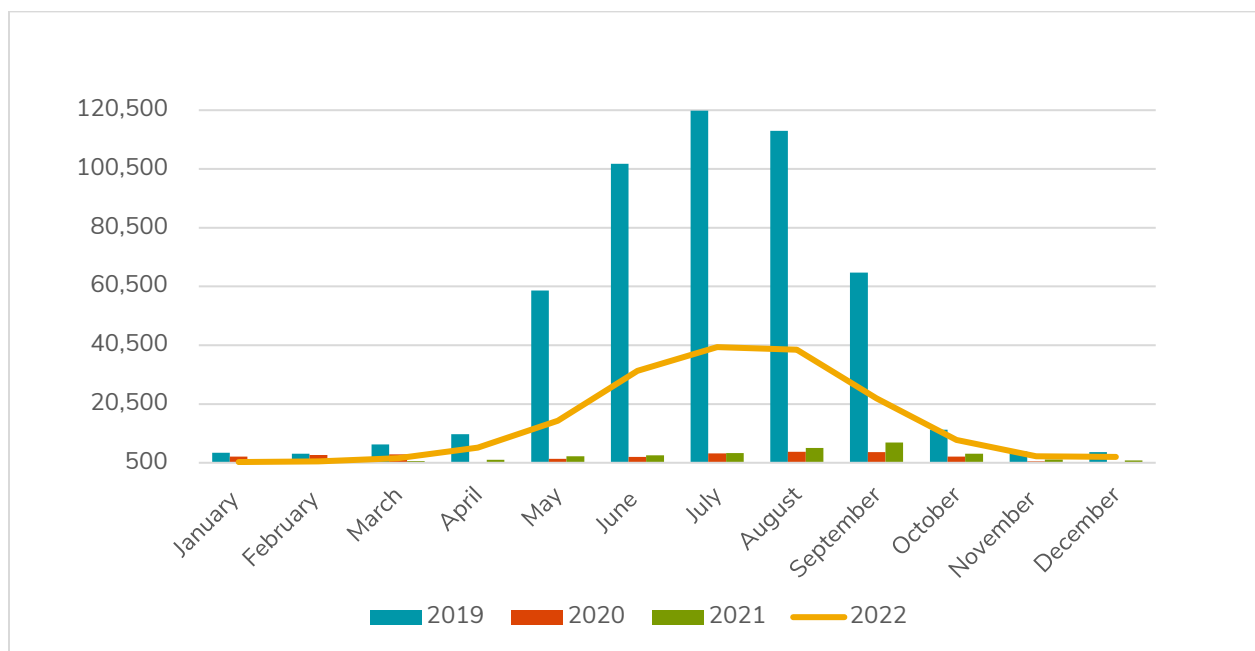
Source: Government of Yukon, Department of Highways and Public Works

Note: Arrivals include visitors and residents

7: International border crossings (into the Yukon)

In 2019, there were roughly 500,000 international border crossings into the Yukon, which decreased by 94% in 2020 and 93% in 2021. Although there were over 170,000 international border crossings in 2022, that number was still 66% lower than in 2019. Across all the years, the summer months of June, July and August consistently show the highest numbers of arrivals. The numbers gradually rise, indicating a progression of the summer season and reflecting increased tourism and travel activity during this period.

Figure 10: International border crossings (into the Yukon)



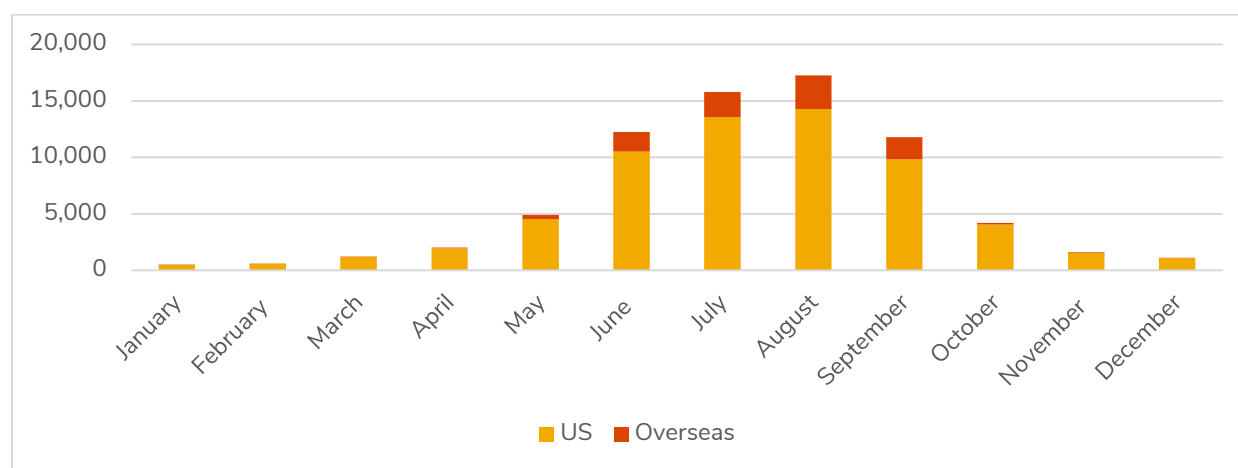
Source: Statistics Canada

Note: Includes domestic, US and overseas land and air travellers and excludes other travellers (immigrants and former residents and crew).

8: International overnight visitation (1+ nights), 2022

A total of 73,244 international overnight visitors stayed in the Yukon in 2022, of whom 63,677 were from the United States of America and 9,567 were from other countries. The months of June, July, August and September in 2022 experienced the highest overall visitation numbers. Among these months, August recorded the highest total visitations.

Figure 11: International overnight visitation (1+ nights),2022



Source: Statistics Canada

Table 3: International overnight visitation (1+ nights), 2019-2022

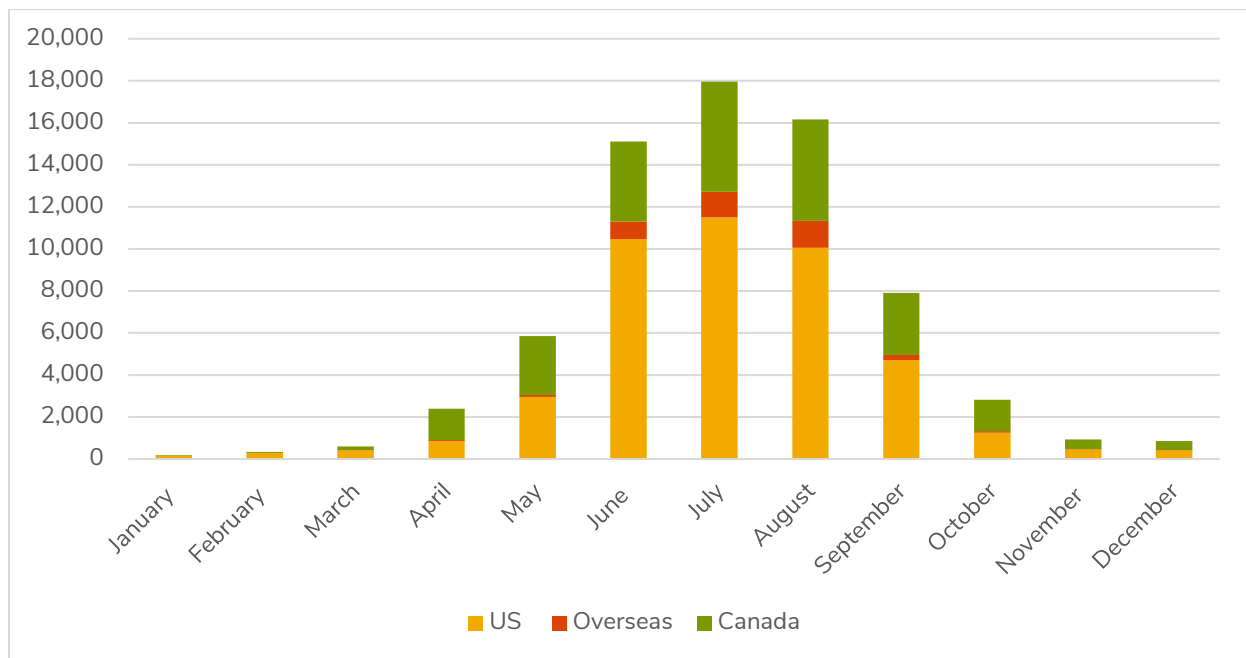
Year		January	February	March	April	May	June	July	August	September	October	November	December
2019	US	1,367	1,182	2,337	3,494	7,451	18,374	23,258	22,312	13,784	5,282	2,037	1,597
	Overseas	68	77	107	179	752	3,386	4,645	4,928	2,832	241	20	47
	TOTAL	1,435	1,259	2,444	3,673	8,203	21,760	27,903	27,240	16,616	5,523	2,057	1,644
2020	US	1,101	1,341	1,320	565	1,482	1,960	2,979	3,611	3,624	2,216	831	544
	Overseas	30	30	44	3	0	0	0	0	0	0	0	0
	TOTAL	1,131	1,371	1,364	568	1,482	1,960	2,979	3,611	3,624	2,216	831	544
2021	US	555	578	842	1,146	2,140	2,446	2,914	4,153	6,114	2,975	1,140	762
	Overseas	0	0	0	0	0	3	0	3	0	1	12	1
	TOTAL	555	578	842	1,146	2,140	2,449	2,914	4,156	6,114	2,976	1,152	763
2022	US	491	579	1,193	1,949	4,552	10,519	13,572	14,287	9,847	4,063	1,554	1,071
	Overseas	2	7	42	73	365	1,725	2,206	2,973	1,951	149	53	21
	TOTAL	493	586	1,235	2,022	4,917	12,244	15,778	17,260	11,798	4,212	1,607	1,092

Source: Statistics Canada

9: Same-day international-border crossings (into the Yukon), 2022

Same-day international border crossings totaled 71,144 in 2022. 3,841 visitors came from other countries, 23,756 were Canadians and 43,547 visitors came from the United States. The summer months of June, July and August experienced the highest overall visitation, with June having the highest number of visitors (15,114) followed by July (17,964) and August (16,156). The trend shows that visitation tends to peak during the summer and decline in the shoulder season.

Figure 12: Same-day international-border crossings (into the Yukon),2022



Source: Statistics Canada

Table 4: Same-day international-border crossings (into the Yukon), 2022

		January	February	March	April	May	June	July	August	September	October	November	December
2019	US	999	756	1,415	2,477	31,571	53,816	61,765	55,726	28,463	2,635	989	735
	Overseas	1	0	10	57	7,781	9,662	10,277	9,956	7,372	274	6	2
	Canada	869	1,013	1,837	2,285	6,355	7,621	9,114	10,599	7,331	1,239	730	1,361
	Total	1,869	1,769	3,262	4,819	45,707	71,099	81,156	76,281	43,166	4,148	1,725	2,098
2020	US	646	700	829	147	270	364	590	479	356	221	86	66
	Overseas	0	5	2	0	0	0	0	0	0	0	0	0
	Canada	513	642	645	20	48	41	85	74	79	51	27	13
	Total	1,159	1,347	1,476	167	318	405	675	553	435	272	113	79
2021	US	87	107	184	312	476	409	662	947	949	389	242	216
	Overseas	0	0	0	1	0	0	0	0	2	3	0	0
	Canada	23	22	22	24	35	65	70	282	167	94	101	176
	Total	110	129	206	337	511	474	732	1,229	1,118	486	343	392
2022	US	154	296	424	863	2,955	10,464	11,501	10,049	4,703	1,258	462	418
	Overseas	0	6	7	34	100	845	1,220	1,286	251	69	9	14
	Canada	27	43	161	1,504	2,800	3,805	5,243	4,821	2,954	1,495	471	432
	Total	181	345	592	2,401	5,855	15,114	17,964	16,156	7,908	2,822	942	864

Source: Statistics Canada

10: Annual number of sporting events and meetings/conferences, 2022

In 2022, there were a total of 3,786 sporting events and 47 meetings/conferences held in the Yukon. The fourth quarter had the highest number of sporting events (1,593), while the first quarter had the highest number of meetings/conferences (19).

Table 5: Annual number of sporting events and meetings/conferences

2022	Sporting events	Meeting /conference events
Q1 (Apr-Jun)	150	19
Q2 (Jul-Sep)	1,282	9
Q3 (Oct-Dec)	761	11
Q4 (Jan-Mar)	1,593	8
Total	3,786	47

Source: Sport Yukon and Yukon Convention Bureau



11: Number of seasonal businesses by industry sector

Seasonal businesses operate for a portion of the year – summer time is when the most seasonal businesses are in operation. The accommodation and food services industry had the highest number of seasonal businesses operating in 2019 and 2021.

Table 6: Number of seasonal (summer) businesses by industry sector

Industry sector	2019	2021
Arts, entertainment & recreation	23	13
Accommodation & food services	66	35
Management of companies & enterprises; administrative & support services	37	24
Rental & leasing	2	2
Information and cultural industries	1	0
Transportation and warehousing	26	14
Retail trade	30	18
Wholesale trade	4	1
Other services (except public admin)	27	17

Source: Government of Yukon, Yukon Bureau of Statistics - Yukon Business Survey

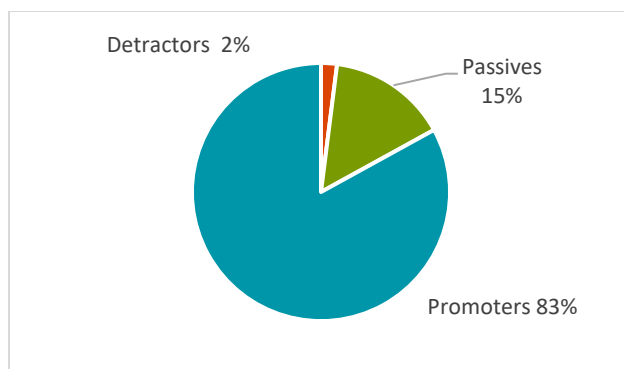


A.2 Visitor Sentiment

1: Visitor satisfaction with the Yukon as a destination

The Net Promoter Score is a simple indicator used to measure the likelihood of a person to recommend or refer a product, service or destination to friends and family. 83% of visitors are likely to recommend a friend or a colleague to visit the Yukon (Promoters), while 2% were Detractors. This results in a NPS score of +81 for recommending the Yukon to a friend or colleague.

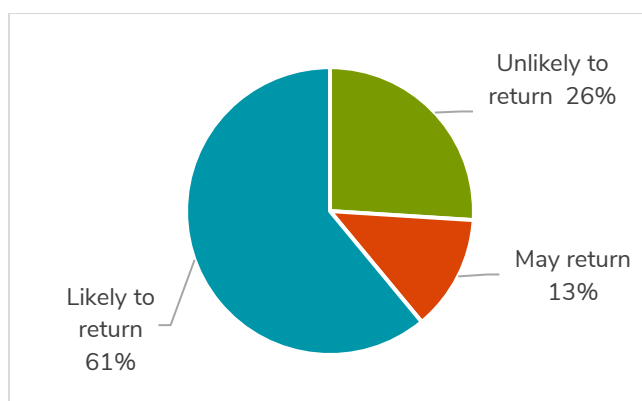
Figure 13: Likelihood to recommend a friend or colleague visit the Yukon, 2017-2018



Source: Government of Yukon, Yukon Bureau of Statistics - Visitor Exit Survey

61% of visitors are likely to visit the Yukon again, while 26% were unlikely to visit again. 13% reported that they may visit the Yukon again.

Figure 14: Likelihood of visiting the Yukon again, 2017-2018



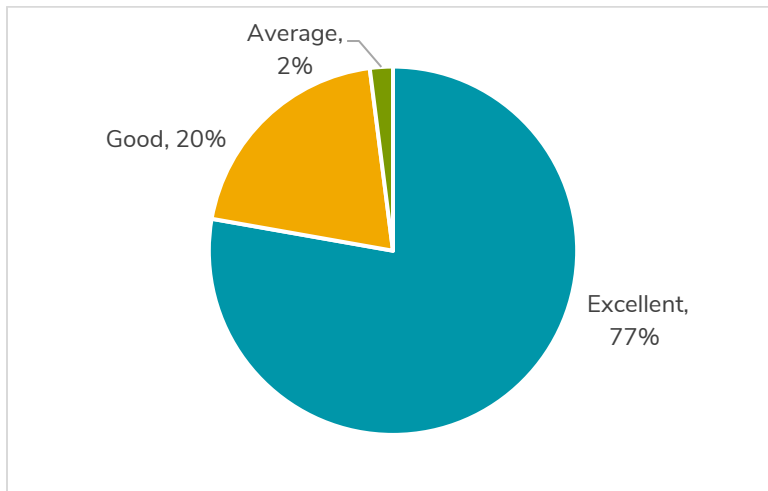
Source: Government of Yukon, Yukon Bureau of Statistics - Visitor Exit Survey



2: Visitor satisfaction with Visitor Information Center (VIC) experiences

In the six Visitor Information Centres in the Yukon, 77% of visitors rated their experience as excellent, 20% as good, 2% as average.

Figure 15: Visitor satisfaction with Visitor Information Center experiences



Source: Government of Yukon, Department of Tourism and Culture

Note: Numbers will not total 100 due to rounding off.

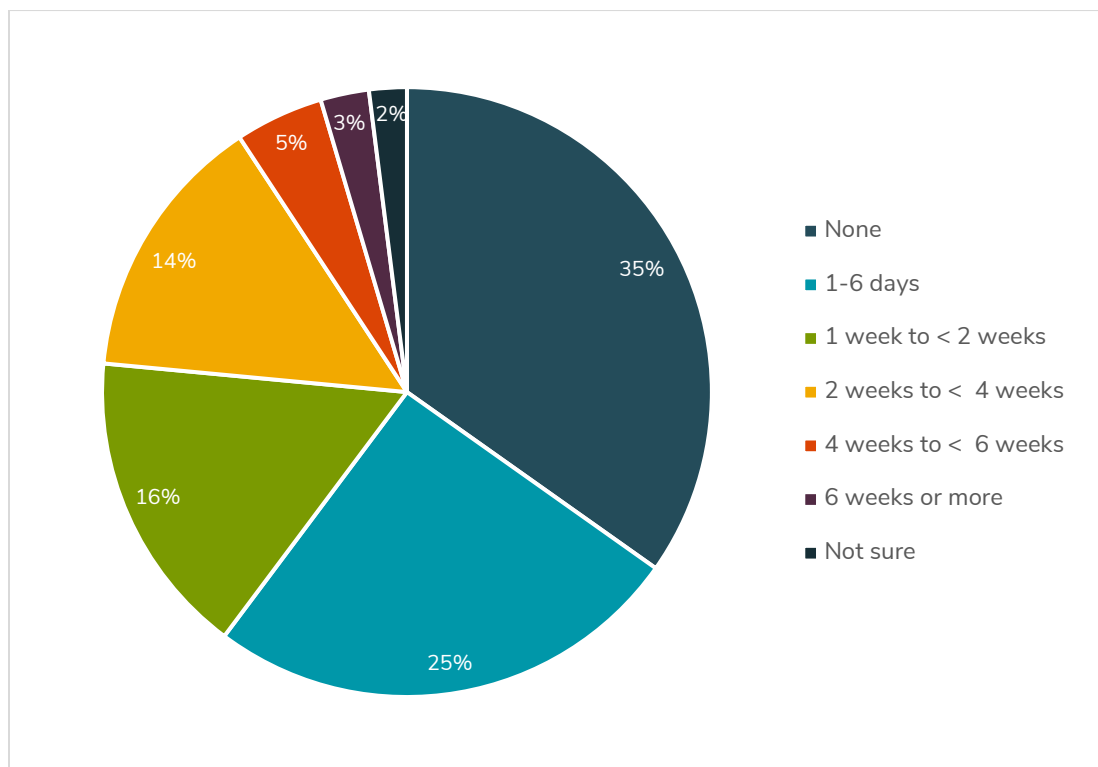


A.3 Resident Travel

1. Number of vacation days spent in the Yukon outside of your home community to another location in the Yukon for leisure or recreational purposes in 2020

In 2020, two-thirds of Yukon residents spent at least one leisure day in another Yukon community while a third of Yukon residents (35%) did not spend any recreational travel time in other Yukon communities.

Figure 16: Number of vacation days spent in the Yukon outside of your home community to another location in the Yukon for leisure or recreational purposes in 2020



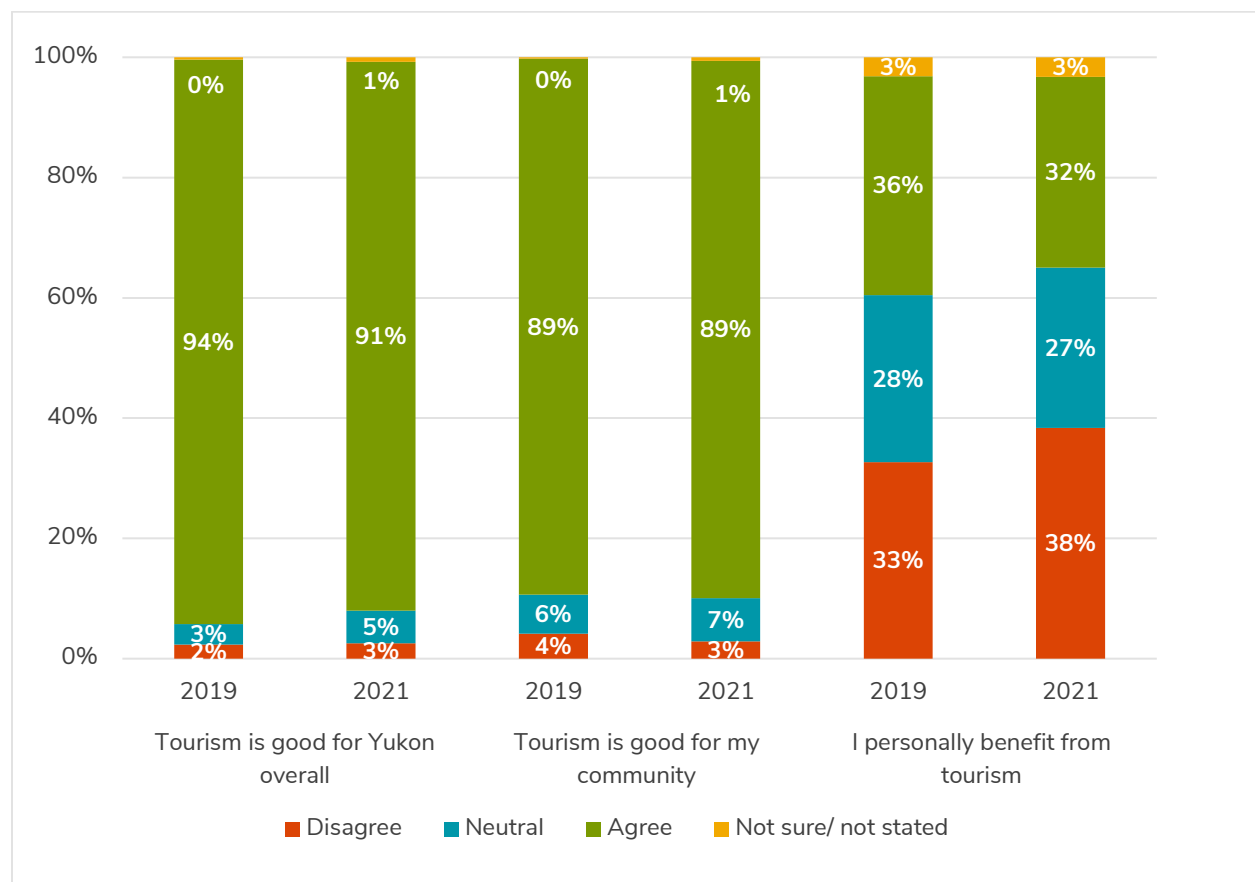
Source: Government of Yukon, Yukon Bureau of Statistics - Resident Perception of Tourism Survey

A.4 Residents' Sentiment

1: Residents' perceptions of tourism

In 2021, 91% of Yukoners agreed that tourism is good for the Yukon as a whole, and 89% agreed that tourism is good for their community. These findings are very similar to those from 2019. Residents were slightly less likely to agree that they directly benefitted from tourism in 2021 (32%) compared to 2019 (36%).

Figure 17: Residents' perceptions of tourism

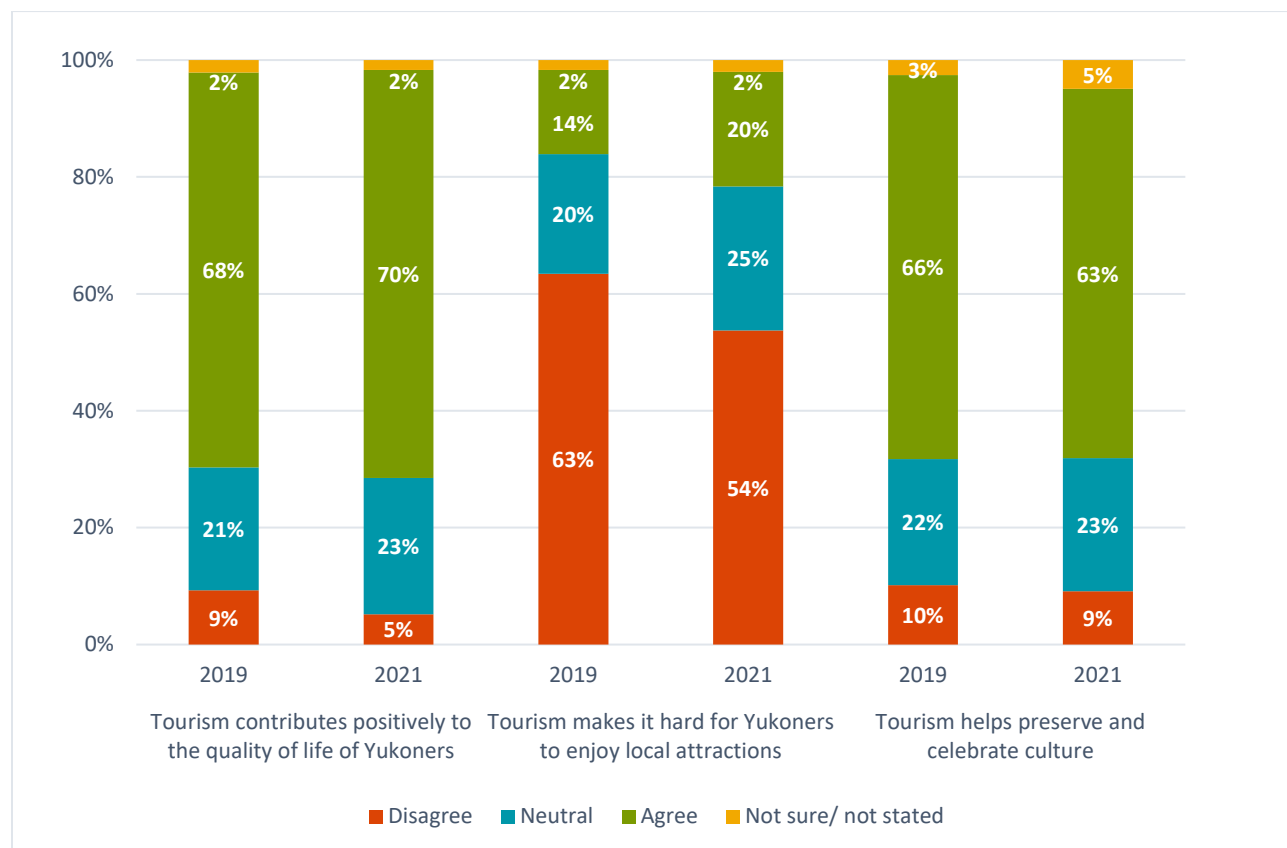


Source: Government of Yukon, Yukon Bureau of Statistics - Resident Perceptions of Tourism Survey

2: Residents' perceptions of the social and cultural impacts of tourism

Overall, the Yukon residents felt positive about the social and cultural impacts of tourism in the Yukon, from 2021 and 2019.

Figure 18: Residents' perceptions of the social and cultural impacts of tourism

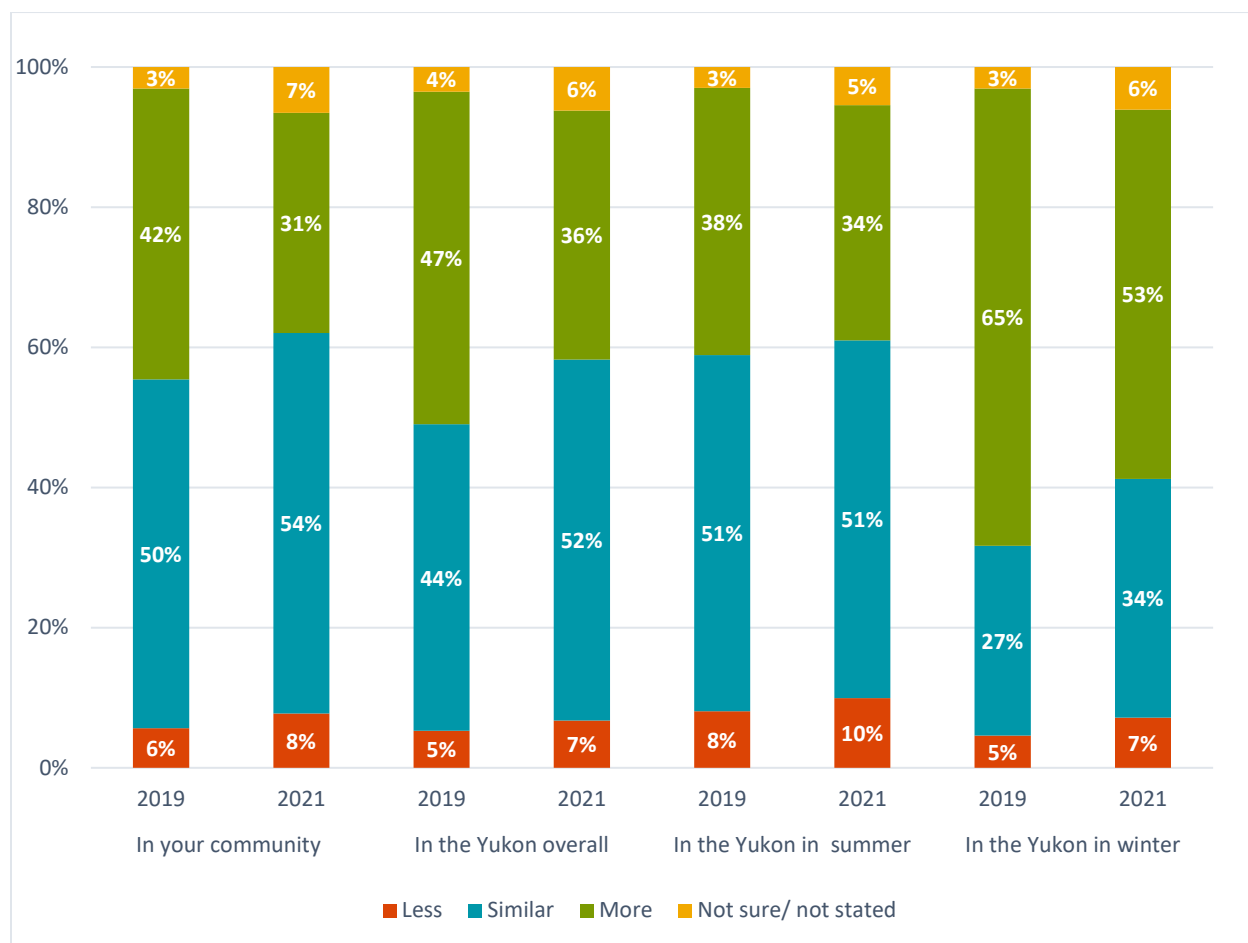


Source: Government of Yukon, Yukon Bureau of Statistics - Resident Perceptions of Tourism Survey

3: Residents' attitudes towards tourism growth

In 2021, 31% of residents wanted to see more tourism in their community over the next ten years. 36% wanted to see more tourism in the Yukon; 34% wanted more summer visitors; and 53% wanted more winter visitors.

Figure 19: Residents' attitudes towards tourism growth

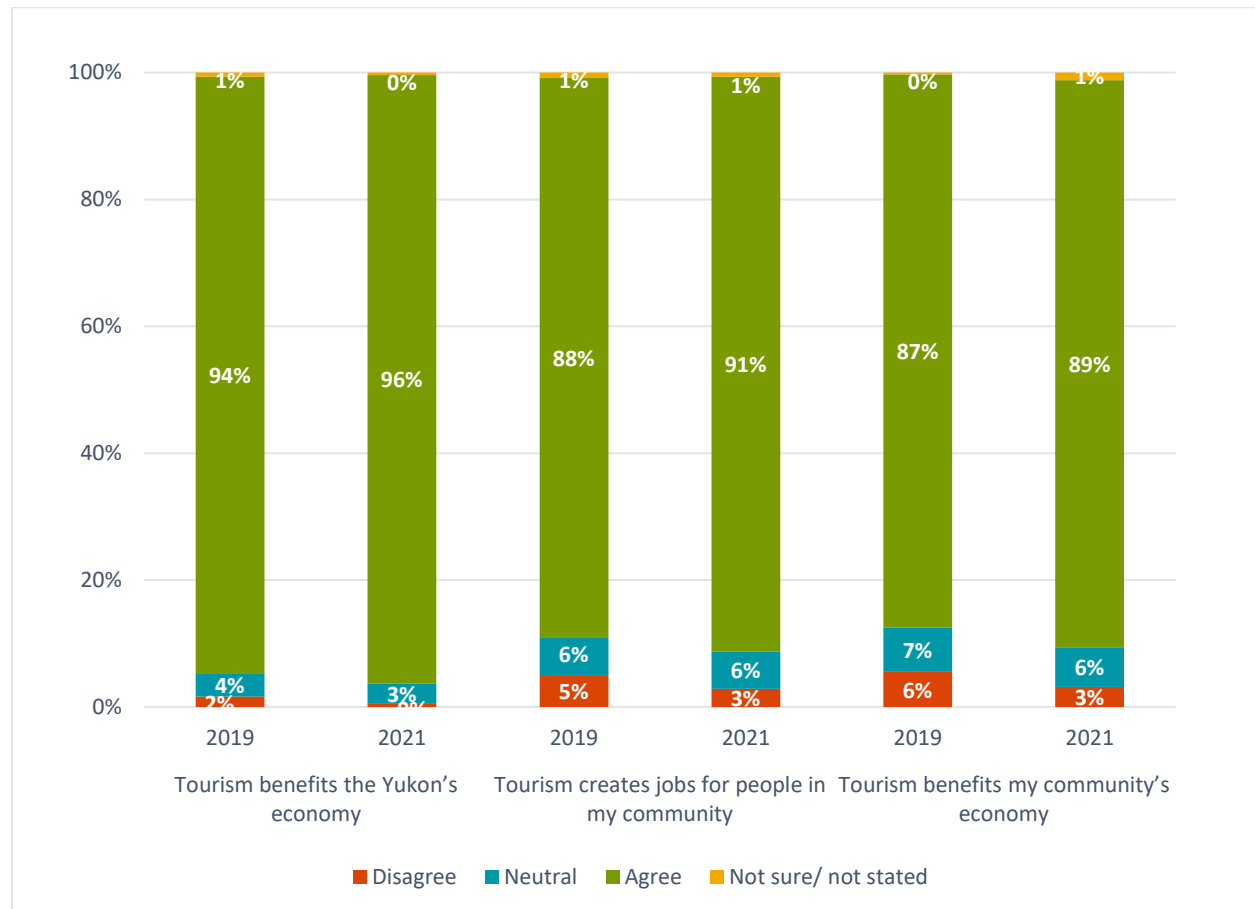


Source: Government of Yukon, Yukon Bureau of Statistics - Resident Perceptions of Tourism Survey

4: Residents' perceptions of tourism economic benefits

In 2021, the vast majority of Yukon residents agreed or strongly agreed that tourism benefits the Yukon's economy, their community's economy, and that it creates jobs for people in their community.

Figure 20: Residents' perceptions of tourism economic benefits

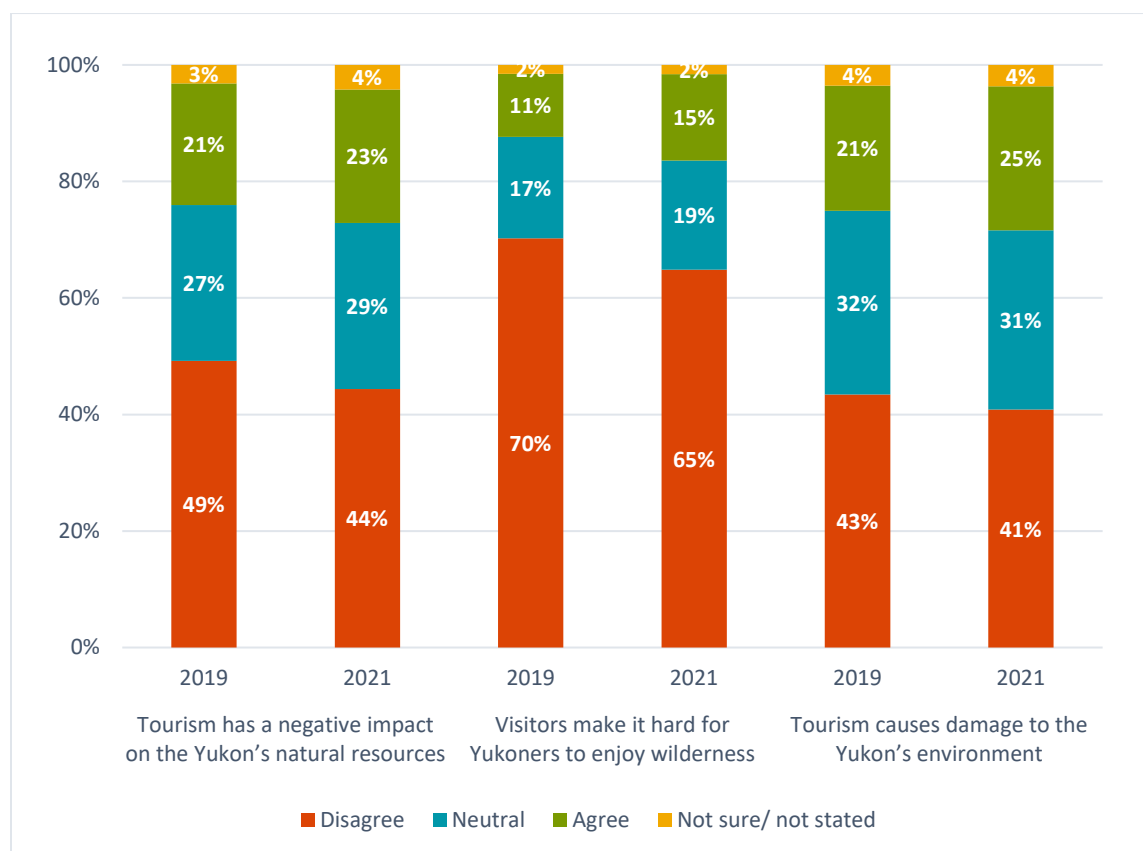


Source: Government of Yukon, Yukon Bureau of Statistics - Resident Perceptions of Tourism Survey

5: Residents' perceptions of the environmental impacts of tourism

A small percentage of Yukon residents worry about how tourism will affect the environment. These numbers were slightly higher in 2021 than they were in 2019. According to 23% of locals, tourism has a negative effect on the Yukon's natural resources, which include hunting, fishing, gathering, and water resources. 15% agreed that visitors make it hard for Yukoners to enjoy the wilderness, and 25% agreed that tourism causes damage to the Yukon's environment.

Figure 21: Residents' perceptions of the environmental impacts of tourism

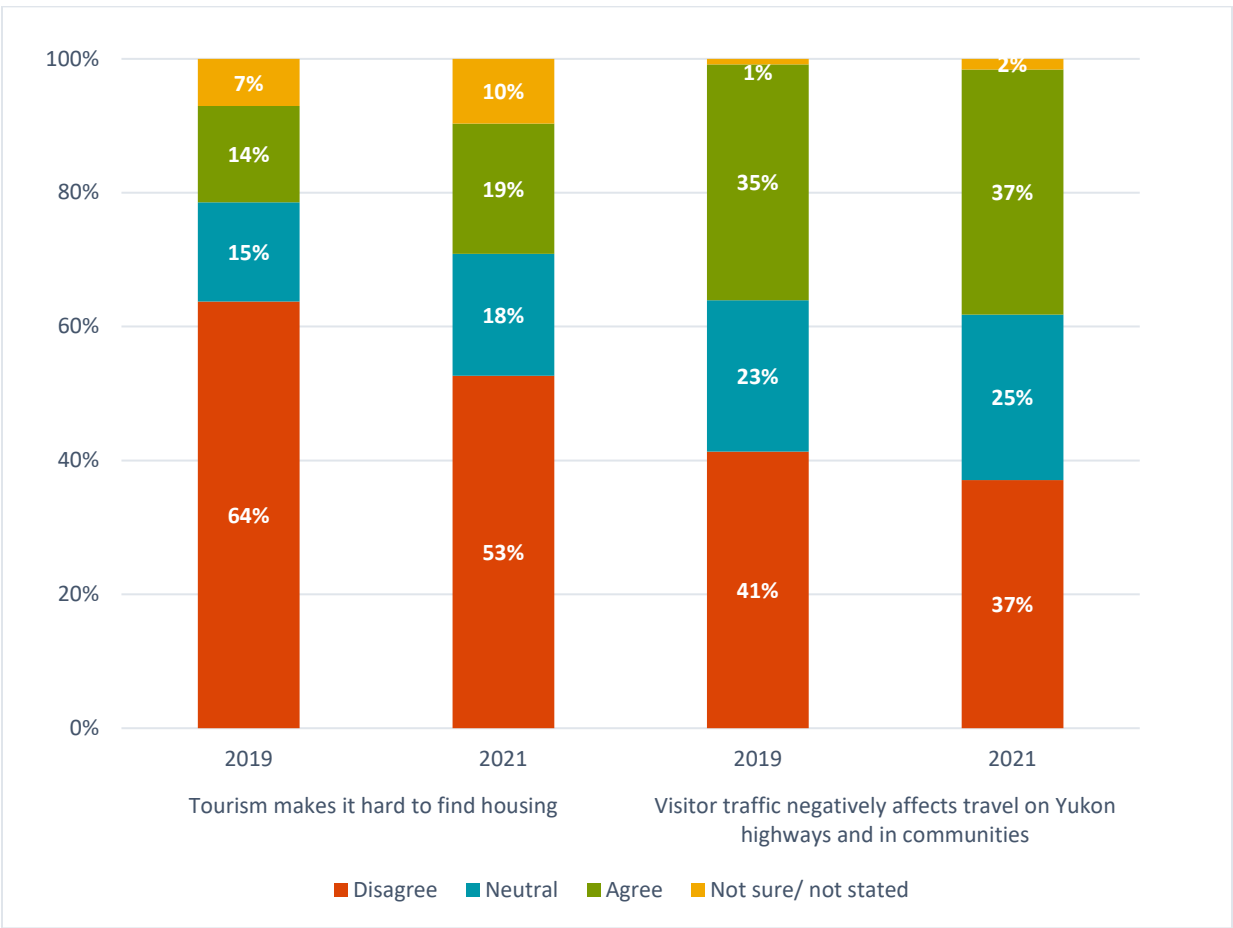


Source: Government of Yukon, Yukon Bureau of Statistics - Resident Perceptions of Tourism Survey

6: Residents’ perceptions of the community impacts of tourism

The percentage of those who felt tourism made it hard to find housing increased from 14% in 2019 to 19% in 2021. In terms of resident perceptions on visitor traffic, the percentage of those who felt visitor traffic had a negative impact increased from 35% in 2019 to 37% in 2021.

Figure 22: Residents’ perceptions of the community impacts of tourism



Source: Government of Yukon, Yukon Bureau of Statistics - Resident Perceptions of Tourism Survey



A.5 Cultural Sustainability

1: Arts, culture and heritage tourism experiences

The Government of Yukon's Department of Tourism and Culture provides financial support for arts, culture and heritage experiences and attractions. In 2021/2022, Arts Unit funding was awarded through the following programs: Arts Operating Fund, Arts Fund, Touring Artist Fund, Advanced Artist Award, On Yukon Time (Great Yukon Summer edition), New Canadians Event Fund, Cultural Industries Training Fund, and Culture Quest. Additionally, the Arts Unit directly funded the Yukon Arts Centre, the Yukon First Nations Culture and Tourism Association, the Northern Cultural Expressions Society, and the Dawson City Arts Society. Historic Sites funding was awarded for projects under the Historic Properties Assistance Program and the Yukon Historic Resources Fund.

Museums and Heritage funding was awarded for partial operational funding and access to project funding for 19 First Nation cultural centres, and museums.

Table 7: Funding awarded for arts, culture and heritage experiences and attractions in 2021-22

T&C - Unit	Funding awarded (CAD)
Arts	\$4,329,907
Historic Sites	\$92,468
Museums and Heritage	\$2,040,000

Source: Government of Yukon, Department of Tourism and Culture, Culture Services Branch

2: Yukon First Nations tourism products and experiences

In order to bolster and enrich visitor experiences and awareness of Yukon First Nations tourism, there are plans to introduce new and enhanced initiatives. These efforts aim to facilitate better alignment between cultural and visitor information centres and creating a more immersive and informative experience for tourists. The funding provided through an agreement made between the Yukon First Nations Culture and Tourism Association (YFNCT) and the Government of Yukon provides insight on this support. The agreement spans the years 2021-2024.



Table 8: Funding provided for Yukon First Nations Culture and Tourism Development

Funding program	Funding provided (CAD)	
	2021-2022	2022-2023
T&C funding provided for Yukon First Nations Culture and Tourism Development	\$160,000	\$160,000

Source: Government of Yukon, Department of Tourism and Culture

3: Support bringing together Yukon First Nations, development corporations, YFNCT and the Indigenous Tourism Association of Canada (ITAC) to discuss how to work together to support First Nations tourism development in the Yukon

In the winter of 2018, the Government of Yukon, ITAC and YFNCT entered into a Memorandum of Understanding that set the foundation for a collaborative partnership in support of the shared goal of creating opportunities to grow Indigenous tourism.

4: Visitor interest and participation in cultural and sporting experiences

According to the Yukon Visitors Exit Survey 2017/18, a diverse range of cultural activities attracted visitors from different walks of life. 7,500 visitors attended, participated or performed in a Yukon First Nations' cultural festival or event, 30,000 attended an arts/music festival and 6,800 attended an organised sports event. These activities collectively offered a diverse range of experiences, enriching the visitors' journeys and contributing to the cultural vibrancy.

5: Respectful travel guidance

In 2023, YFNCT launched the “Walk with Us: Respectful Travel Guidelines”. These guidelines are based on the knowledge, stories and wisdom of Elders and Knowledge Keepers representing all 8 Indigenous language groups in the Yukon. As outlined in the Guidelines:

The Guidelines are intended as an educational tool to build cultural awareness and understanding of the traditional values of Share, Care, Respect and Relationship Building as they relate to travel on and engagement with the land, water, culture and communities. These ancestral teachings are common to all Yukon First Nations and are intended to help



educate everyone including, but not limited to, visitors, Yukoners, and tourism service providers and their staff.

The Guidelines are shared widely through visitor information centres across the Yukon and on multiple websites.

A.6 Accessibility, Diversity, Equity and Inclusivity

There are a variety of policies and programs designed to increase accessibility throughout the Yukon. Below is a summary of the key findings:

- Public transit in Whitehorse, Yukon is wheelchair accessible.
- Currently, 15 conventional buses are kneeling buses to help wheelchair boarding.
- The City of Whitehorse also has two buses to accommodate those whose mobility challenges make it difficult for them to take conventional buses.
- The Visitor Information Centre in Whitehorse has a gender-neutral public washroom.
- Yukon Parks' campgrounds, territorial parks, trails, recreation sites, larger parks have gender-neutral outhouses.
- The Tombstone Interpretive Centre has one unisex, wheelchair-accessible washroom.
- 100% of the washrooms are gender-neutral at the S.S. Klondike National Historic Site, Kluane National Park and Reserve (Trails, Campgrounds, Thechàl Dhàl Visitor Centre) and Ivvavik National Park.
- 88% of the washrooms at the Klondike National Historic Sites are gender neutral (Dawson City).
- There are a number of wheelchair accessible campground designs and features throughout the territory.



B. Economy

B.1 Economic Benefits

1: Gross Domestic Product (%) attributable to tourism

Tourism accounted for 2.2% of the Yukon's Gross Domestic Product in 2020 (\$63.7 million), compared to 5.0% (\$146.1 million) in 2018.

Table 9: GDP (%) attributable to tourism

Year	% GDP	Million (CAD\$)
2012	4.3	113.8
2014	3.9	95.9
2016	4.4	117.2
2018	5.0	146.1
2020	2.2	63.7

Source: Government of Yukon, Yukon Bureau of Statistics - Yukon Business Survey

Yukon businesses attributed \$146.2 million of their gross revenue in 2020 to tourism, compared to \$367.8 million in 2018.

Table 10: Gross revenue attributed to tourism by Yukon businesses

Year	Million (CAD\$)
2012	249.5
2014	226.9
2016	262.9
2018	367.8
2020	146.2

Source: Government of Yukon, Yukon Bureau of Statistics - Yukon Business Survey



2: Visitors Spend

The table below shows the visitors spending in the 2017-18 fiscal year by all visitors, including Canadian, American and Overseas visitors. Excluding travel packages, visitors spent \$148 million while visiting the Yukon. The highest amount was spent on transportation, followed by accommodations and food and beverages.

Table 11: Total visitor spend in the Yukon, packages excluded (CAD)

Visitor type	Spend type	2017/2018
All visitors	Transportation	\$47,593,500
	Accommodation	\$40,304,100
	Food and beverage	\$34,374,100
	Clothing and gifts	\$9,230,900
	Recreation and entertainment	\$8,712,800
	Other activities	\$7,768,900
	Total	\$147,984,300
Canadian visitors	Transportation	\$22,929,100
	Accommodation	\$20,016,700
	Food and beverage	\$15,962,700
	Clothing and gifts	\$4,715,800
	Recreation and entertainment	\$3,724,800
	Other activities	\$4,614,700
American visitors	Transportation	\$19,568,400
	Accommodation	\$16,406,100
	Food and beverage	\$14,657,300
	Clothing and gifts	\$3,347,100
	Recreation and entertainment	\$3,952,900
	Other activities	\$2,966,700
Overseas visitors	Transportation	\$5,096,100
	Accommodation	\$4,041,300
	Food and beverage	\$3,754,100
	Clothing and gifts	\$1,168,000
	Recreation and entertainment	\$1,035,200
	Other activities	\$187,500

Source: Government of Yukon, Yukon Bureau of Statistics -Visitor Exit Survey, 2017/18



C. Governance and Administration

C.1 Governance

Efficient governance and coordination are fundamental to the success of the Yukon's tourism sector, encompassing various critical facets, including sustainable tourism development, visitor education, efficiency and support mechanisms, community and Indigenous engagement, land use planning, regulatory control, and destination promotion. By addressing these critical components, the Yukon aims to foster responsible and sustainable destination development while preserving its unique cultural and natural heritage.

One of the central goals outlined in the YTDS is the pursuit of sustainable tourism development, ensuring a balance between economic growth, social well-being and environmental preservation. To gauge the advancement of this objective, the YTDS has called for the establishment of a structured framework specifically designed for evaluating and monitoring the sustainability of tourism development. This initiative materialized in May 2022 with the launch of the Yukon Sustainable Tourism Framework (YSTF), garnering substantial support from six influential tourism non-governmental organizations in the Yukon, the Yukon Tourism Advisory Board, the Yukon's Premier, and Destination Canada. The YSTF incorporates a set of vital indicators to gauge progress, including reference to sustainability principles in the strategy or plan, the existence of a framework for assessing and overseeing the sustainability of tourism development, an annual workshop and dissemination of framework results (e.g., reports, dashboards, workshops), and a predetermined schedule for framework reviews.

Moreover, the Yukon places considerable emphasis on fostering responsible tourism practices. Visitors are provided with valuable educational resources that guide them toward travel experiences that align with the community's values. YFNCT has launched the "*Walk with Us – Respectful Travel Guidelines*." The territory is actively planning further initiatives to encourage visitors to travel in ways that reduce their carbon footprint.



In 2019, T&C initiated a governance task force recommendation, opting for a made-in-the-Yukon governance model. This model optimizes the benefits of its line-department structure while allowing for more direct involvement of tourism industry partners and stakeholders through the Yukon Tourism Advisory Board (YTAB). YTAB's composition includes representatives from Yukon First Nations, the cultural sector and municipalities.

The Yukon's commitment to a unified and efficient approach to tourism is evidenced through its one-government model. This model aims to streamline access to government programs and services for the tourism industry by creating a centralized entry point, enhancing coordination, and improving overall effectiveness. To reinforce this approach further, the Government of Yukon established the Deputy Ministers' Committee on Tourism in 2020.

Financial support for tourism development initiatives is another crucial aspect of governance. In the fiscal year 2021/2022, the Government of Yukon's Department of Tourism and Culture allocated a total of \$907,284 to support tourism development. This funding was disbursed to various recipients, including tourism association partners through Transfer Payment Agreements, as well as tourism businesses and organizations that received funding through the Tourism Cooperative Marketing Fund or the Product Development Partnership Program. It's noteworthy that this funding was allocated for activities conducted between April 1, 2021, and March 31, 2022.

The establishment of the Yukon Sustainable Tourism Working Group (STWG) in the fall of 2022 reflects the Yukon's steadfast commitment to engaging with communities and fostering reconciliation efforts. The composition and engagement schedule of the STWG further underscores the region's dedication to ongoing collaboration with the Yukon's diverse communities. These commitments are tangibly demonstrated through the numerous meetings and events hosted by T&C, involving various communities and Yukon First Nations, thereby affirming the region's unwavering commitment to community and Indigenous engagement.

Land use and regulatory control are fundamental aspects of governance. Three separate Acts serve as the primary tools for land use permitting and the disposition of



the Yukon's public lands: the *Lands Act* (2002), the *Territorial Lands (Yukon) Act* (2003), and the *Land Titles Act* (2015). Yukon First Nation Governments currently use some of these tools to manage Settlement Land. To modernize and replace the existing legislation, the Yukon is developing a new Yukon Public Lands Act. This initiative commenced with the creation of a Lands Act Successor group in 2020. Following initial First Nation consultation and public engagement, the successor group is creating an enhanced process for the development of new lands legislation, which will harmonize with mining legislation. Concurrently, First Nation governments are crafting their own land act regulations to manage settlement land and traditional territories.

Regional land use plans and the Yukon Environmental and Socio-economic Assessment Act (YESAA) legislation are integral to land use planning and regulatory control. Thus far, regional land use plans have been formulated for two of the ten Yukon regions. The objectives of these plans include minimizing land use conflicts, promoting the cultural values of Yukon Indigenous Peoples, and ensuring sustainable development. YESAA legislation plays a crucial role in ensuring that development projects triggering an assessment align with land use plans. For regions lacking completed plans, YESAA fosters beneficial socio-economic changes while safeguarding ecological and social systems.

The Yukon's regional land use planning and YESAA legislation derive from the *Umbrella Final Agreement* (UFA), a framework guiding negotiations for individual Final Agreements of the Yukon's First Nations. This pivotal agreement was signed on May 29, 1993, by the Government of Canada, the Government of Yukon, and the Council of Yukon First Nations.

Furthermore, the Yukon manages land use through a diverse array of smaller-scale plans, policies, regulations and guidelines. These encompass local area plans, habitat protection area management plans, off-road vehicle management area regulations, agricultural policy, trapping cabin and big game outfitting land application policies, the mineral development strategy, and the stewardship of Yukon's wetlands policy, among numerous others. Federal government legislation also plays a role in protecting and



regulating various areas in the Yukon, including national parks, historic sites, and wildlife areas.

It's worth noting that certain legislation and policies in the Yukon may require updating or creation to ensure clarity and fairness. Among these are the trapping cabin and big game outfitting land application policies. The new Yukon Public Lands Act aims to address some of the issues in the current policies, including the absence of a commercial wilderness land tenure policy. However, the Lands Act remains several years away from completion. Additionally, resource road regulations currently in development will address specific land use issues upon completion.

The promotion of the Yukon as a year-round tourism destination is a key aspect of the YTDS. This involves highlighting the unique assets that distinguish the Yukon from other destinations and maximizing capacity during the shoulder and winter seasons. This initiative aligns with YTDS Action 4.1 and is subject to specific indicators. These indicators assess the presence and execution of a comprehensive marketing strategy for the destination, as well as tangible evidence showcasing the active implementation of this strategy.

C.2 Employment and Human Resources

1: Number of Jobs and wages in the tourism sector

Tourism accounted for 2,360 jobs in the Yukon in 2019, or 9% of all jobs. 2017 accounted for the maximum number of jobs in tourism: 2,580. In 2019, the average hourly wage was \$31.13.

Table 12: Jobs and wages in the tourism sector

Year	Proportion of tourism jobs to total jobs	Total number of tourism jobs	Average hourly wage
2015	13.5	1,915	\$33.23
2016	9.8	2,358	\$29.83
2017	10.1	2,580	\$29.31
2018	8.9	2,265	\$30.49
2019	9	2,360	\$31.13

Source: Government of Yukon, Yukon Bureau of Statistics - Tourism Employment Report



D. Resource Management

D.1 Energy Management

1: Tourism buildings and sites with renewable energy systems in place

The table below shows an estimate of the numbers of tourism buildings in the Yukon with renewable energy systems in place. The numbers are based on systems installed privately and through the Government of Yukon's microgeneration program. Most systems are solar in nature. The category "private business, food and drink" includes restaurants and grocery stores. Numbers are reported at the end of each calendar year and are cumulative in nature.

Table 13: Number of tourism buildings and sites with renewable energy systems in place

Building Type	2019	2020	2021	2022
Attraction	2	3	3	4
Yukon First Nations Visitor/Cultural Centre	4	5	6	6
Private business, retail	2	4	4	4
Private business, food and drink		2	3	3
Private business, hospitality	1	2	2	2
Total	7	16	18	19

Source: Government of Yukon, Department of Energy, Mines and Resources, Energy Branch

2: Yukon communities that can be reached in an electric vehicle from Whitehorse

Over the years, the accessibility of electric vehicles for road-accessible Yukon communities from Whitehorse has shown significant progress. In 2019, only 2 out of 13 communities were reachable in electric vehicles. The situation improved in 2020 with 3 communities accessible, and by 2021, the number increased to 9 communities. The efforts to enhance electric vehicle infrastructure continued, and by the end of 2022, 11 out of 13 road-accessible Yukon communities could be reached conveniently in electric vehicles from Whitehorse, signaling a step towards achieving the goal of making all communities accessible by electric vehicles by 2027.



E. Environment

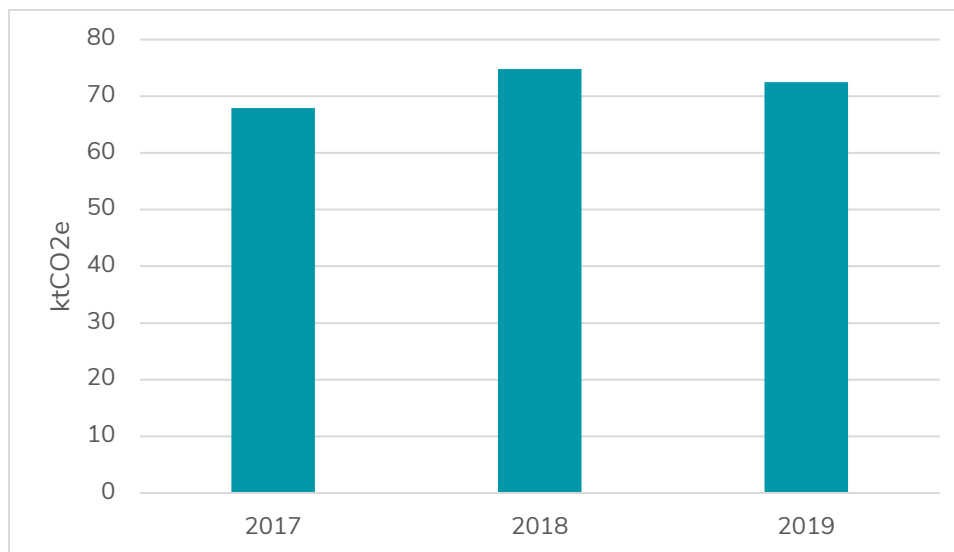
E.1 Climate Action

1: Greenhouse gas emissions from tourism

This section provides benchmark information on the greenhouse gas emissions associated with the Yukon's tourism sector for the years 2017-2019. Tourism-related industry sector activity and road travel by visitors are considered using the model developed by the Yukon Bureau of Statistics to track GHG emissions from the Yukon's tourism sector. The next GHG estimate for the sector will be available in 2024, for the years 2022-2023.

Tourism emissions ranged from 67.9 to 74.8 kilotonnes of carbon dioxide equivalent (ktCO₂e) from 2017-2019, with 2018 being the highest.

Figure 23: Greenhouse gas emissions attributable to the Yukon's tourism



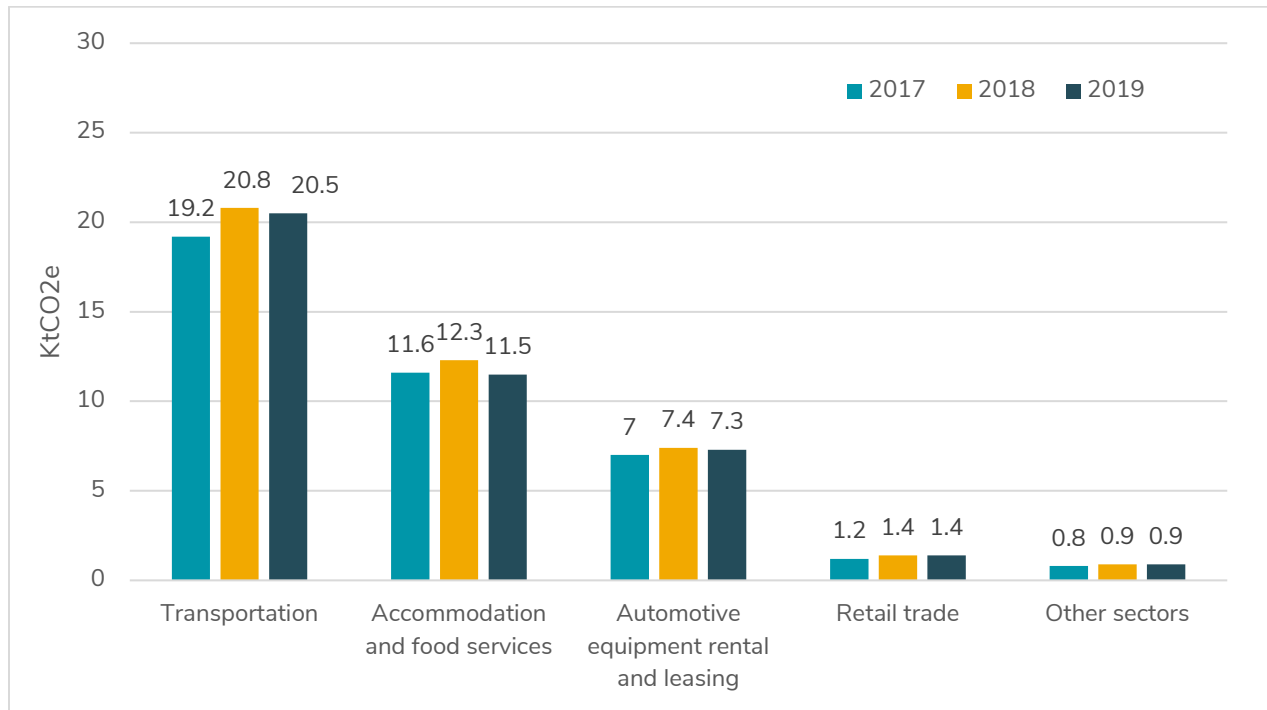
Source: Government of Yukon, Yukon Bureau of Statistics – Report on Greenhouse Gas Emissions Attributable to Tourism in the Yukon, 2017-2019



2: Tourism emissions by industry sector

The largest share of emissions from tourism-related industry sectors came from transportation, followed by accommodation and food services.

Figure 24: Tourism emissions by industry sector, Yukon

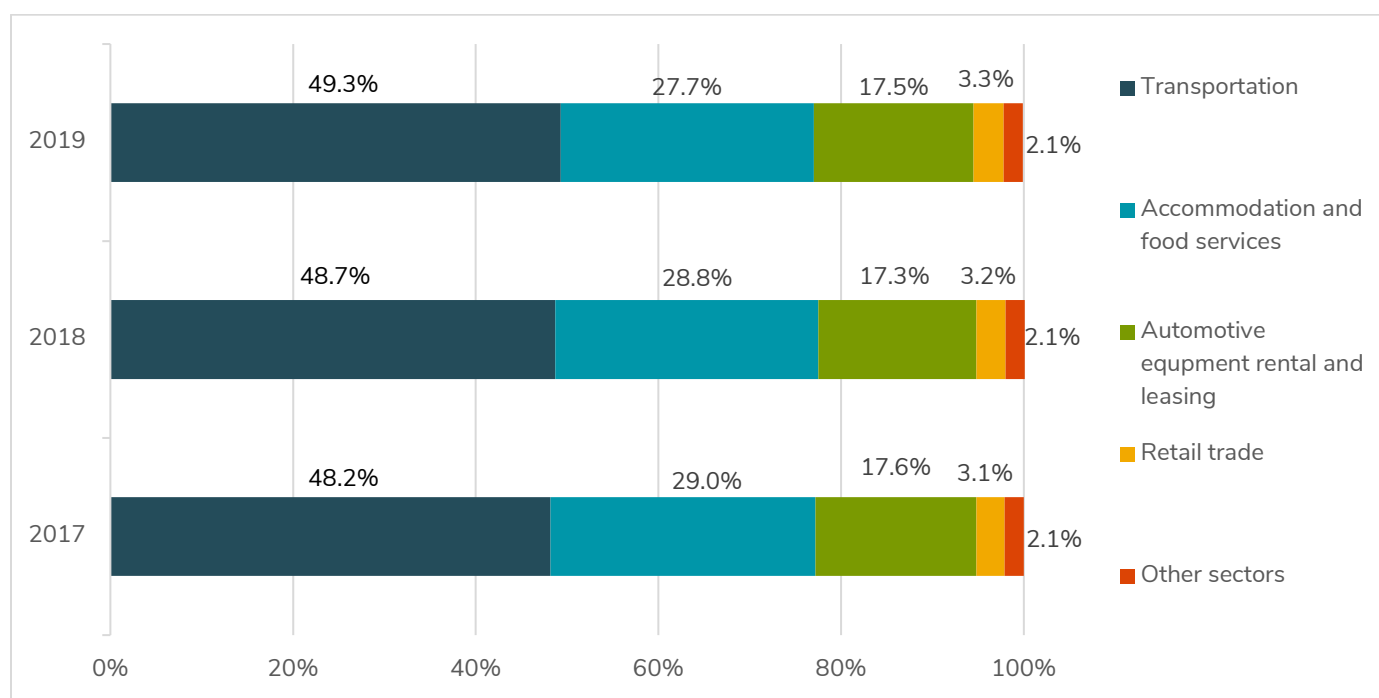


Source: Government of Yukon, Yukon Bureau of Statistics – Report on Greenhouse Gas Emissions Attributable to Tourism in the Yukon, 2017-2019

3: Percentage of emissions from tourism by industry sector

Together, the transportation and accommodation and food services sectors accounted for over 75% of the total emissions from tourism-related industry sectors, and the distribution remained almost the same over these three years. The third largest share of emissions came from automotive equipment rental and leasing. From 2017 to 2019, the emissions profile across sectors was relatively uniform. The only exception was accommodation and food services in 2019, which decreased slightly by 0.4% compared to 2017. This may have been due to a combined effect of a reduction in heating degree days³.

Figure 25: Percentage of emissions from tourism by industry sector, Yukon, 2017-2019



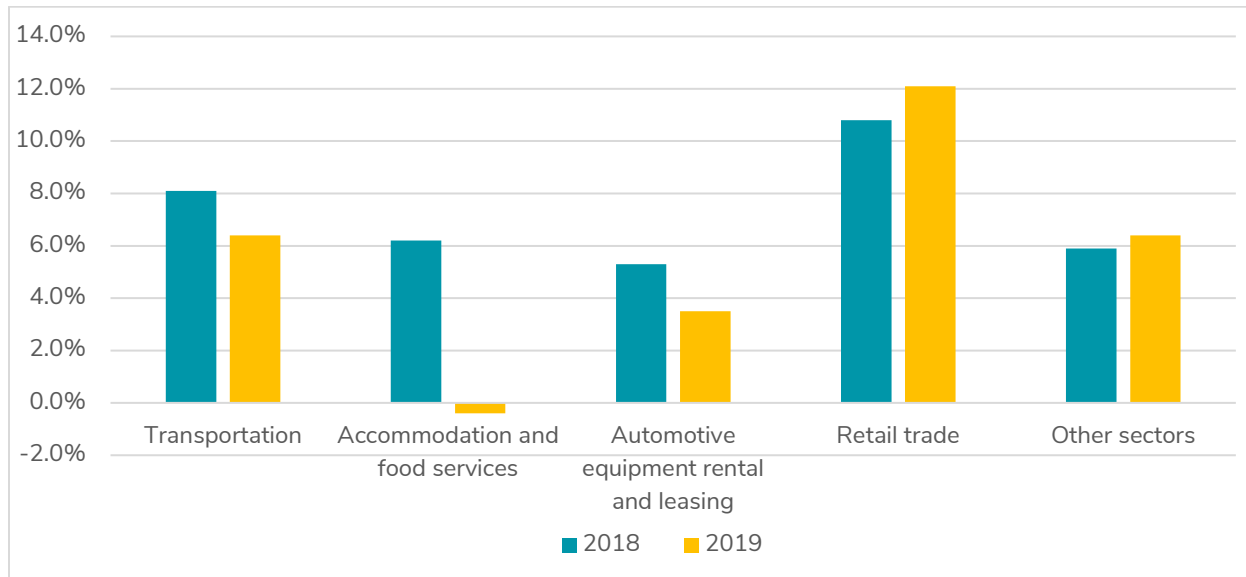
Source: Government of Yukon, Yukon Bureau of Statistics – Report on Greenhouse Gas Emissions Attributable to Tourism in the Yukon, 2017-2019

³ A Degree Day is a unit of measurement equal to a difference of one degree between the mean outdoor temperature and a reference temperature (18 degrees Celsius). Degree Days are used in estimating the energy needs for heating or cooling a building.

4: Changes in tourism emissions by industry sector compared to 2017

Taking 2017 as the base year, the largest increase in tourism emissions came from retail trade in both 2018 (10.8%) and 2019 (12.1 %).

Figure 26: Changes in tourism emissions by industry sector compared to 2017

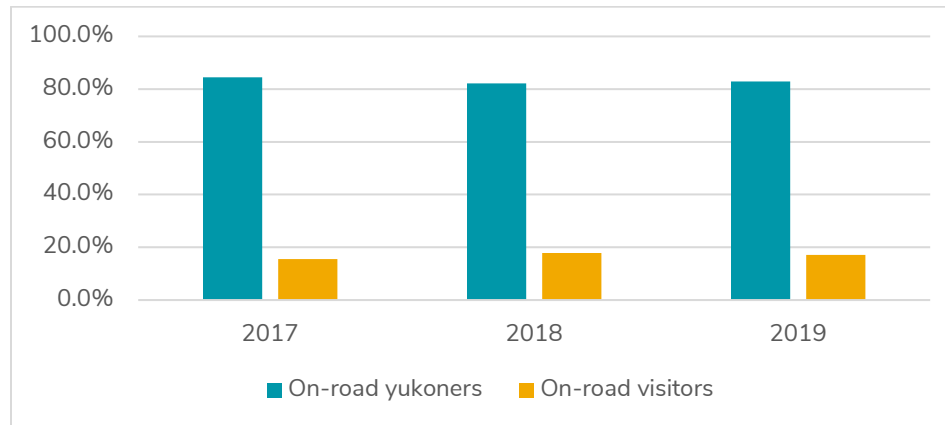


Source: Government of Yukon, Yukon Bureau of Statistics – Report on Greenhouse Gas Emissions Attributable to Tourism in the Yukon, 2017-2019

5: GHG emissions from visitors travelling by road.

GHG emissions from visitors travelling by road fluctuated over the three years with 2018 being the highest (17.8%).

Figure 27: GHG emissions from visitors travelling by road



Source: Government of Yukon, Yukon Bureau of Statistics – Report on Greenhouse Gas Emissions Attributable to Tourism in the Yukon, 2017-2019

6: Visitor education

At Parks Canada sites in 2022, various educational initiatives were undertaken to raise awareness among visitors about the impacts of climate change in the Yukon. At Klondike National Historic Sites, town walking tours were organized to highlight the effects of melting permafrost on the region. Meanwhile, Kluane National Park and Reserve offered climate change hikes and walks, providing visitors with hands-on experiences to witness the evolving landscape.

The Thechàl Dhâl Visitor Centre showcased exhibits and facilitated conversations focusing on the stream capture event that significantly altered the 'Ä'äy Chù Valley, exemplifying the tangible effects of climate change in the region. Through these initiatives, visitors were educated about the urgent need for environmental preservation and the importance of collective efforts to mitigate climate change impacts in the Yukon.



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Abbreviations

CAD	Canadian dollars
GDP	Gross domestic product
GHG	Greenhouse gas
INSTO	International Network of Sustainable Tourism Observatories
ITAC	Indigenous Tourism Association of Canada
NPS	Net Promoter Score
OCF	Our Clean Future
STWG	Sustainable Tourism Working Group
T&C	Department of Tourism and Culture
UFA	Umbrella Final Agreement
VES	Visitors Exit Survey
VIC	Visitor Information Center
YESAA	Yukon Environmental and Socioeconomic Assessment Act
YFNCT	Yukon First Nations Culture and Tourism Association
YSTF	Yukon Sustainable Tourism Framework
YTAB	Yukon Tourism Advisory Board
YTDS	Yukon Tourism Development Strategy

