

# **Yukon Wilderness Tourism Operator's Survey**

**Final Report  
October 18, 2002**

For: Wilderness Tourism Association of the Yukon  
By: Stephen Reynolds

## **Introduction:**

A demographic/psycho graphic survey was designed with input and guidance from the Wilderness Tourism Association of the Yukon (WTAY) and YTG's Department of Business, Tourism and Culture. The survey was distributed to WTAY members in June, with completed surveys returned by the end of September and examined in October of 2002.

Seventy-eight surveys were mailed out to WTAY members, with self-addressed, self-stamped envelopes included for returning the survey. Of the WTAY member list total, about 15 members could be considered individuals, government departments, or associations, and therefore do not conduct adventure travel trips. Fourteen completed surveys were returned. This gave an approximate return rate of 25%. This report is based on the responses contained in those 14 surveys.

The purpose of the survey was to solicit responses from Yukon Wilderness Tourism Operators regarding the actual source origins and motivations of their clients. This information should prove useful in directing future wilderness tourism marketing campaigns, both in terms of providing 'motivating factors' of potential wilderness tourism clients, and in locating 'successful' countries, regions and cities for advertising placement or campaign focus.

Specific identities of the operators were not required or noted, as complete anonymity was desired on behalf of all respondents by the WTAY.

The survey itself can be found in Appendix A. Compiled responses to the survey can be found in Appendix B. A summary of calculations and assumptions used to derive financial impacts of the wilderness tourism industry are found in Appendix C.

## **General Survey Overview:**

The responses to this survey show that wilderness tourism clients come from the major urban centers in North America and Europe, with a smaller number coming from Australia. Most operators reported an almost even split of men and women coming on their trips, with a few operators showing a 'mostly male' make up of their clients. The bulk of the wilderness tourism clients are between the ages of 25 and 45, with a few operators reporting that half or more of their clients are over 55 years of age.

Wilderness tourism clients were strongly motivated by the Yukon's wilderness, remoteness, nature and wildlife. Wilderness tourism clients spent an average of \$2730 in summer and \$1750 in winter for their vacation packages, and while in the Yukon spent an average of \$1000 on "extra expenditures" that were not included in their package. Non-wilderness interests of wilderness tourism clients in the Yukon are shopping, historic sites, museums, and First Nations culture. Recent trends in client behaviour show an increasing use of the Internet to investigate, compare and book trips, and that trip bookings are happening closer to departure dates.

**Survey Responses:** (all lists are given from most to least common occurrence, with actual number of occurrences given in parenthesis)

**Question #1** asked for the 3 most common (States, Provinces, Countries) of client origin and the most common city for each of those regions; for the U.S., Canada, Europe and Other Countries.

For the **U.S.** the most frequently noted States were; California (5), Washington (4), New York (4), Michigan (3), Oregon (2), Alaska (2), Pennsylvania (2), Minnesota (2), with Illinois, Washington D.C., Maine, Idaho and Montana each being mentioned once.

The most frequently noted cities in the U.S. were; New York (4), Los Angeles (2), with Chicago, Washington, Milwaukee, Lancaster, St. Paul, Fairbanks San Francisco and Seattle each being mentioned once

For **Canada** the most frequently noted Provinces were; Alberta (10), Ontario (10), B.C. (8), with Quebec mentioned once.

The most frequently noted cities in Canada were; Toronto (7), Vancouver (6), Calgary (6), Edmonton (3), with Montreal and Ottawa each being mentioned once.

For **Europe** the most frequently noted Countries were; Germany (13), Austria (8), Switzerland (8), the United Kingdom (5), France (4), with Italy, Spain and the Netherlands each mentioned once.

The most frequently noted cities in Europe were; Paris (3), London (3), Munich (2), with Hamburg, Vienna, Barcelona, Sennwald, Frankfurt, Wien and Selzach each mentioned once.

**Other countries** that were noted were; Australia (4), with South Africa and Japan each mentioned once.

The most frequently noted cities in these countries were; Sydney, Cape Town and Tokyo each mentioned once.

The final part of Question #1 asked for the 'most common origin' of clients overall. The responses were; Germany (7), Switzerland (5), U.S. (5), Austria (3), Canada (3), Ontario (2), the U.K. (2), with France, Australia, Toronto, Calgary, Vancouver and Europe each being mentioned once.

**Question # 2** asked for the age ranges of clients across four categories (18-25, 26-39, 40-55, over 55). The responses were quite varied. While most operators grouped the bulk of their clients in the middle two categories (i.e. 26-39 and 40-55), some operators reported up to 50% of their clients were in the 'over 55' category. The '18-25' category was consistently rated as representing the lowest proportion of clients, with the exception of three operators.

**Question # 3** asked for the gender breakdown of clients. While most operators (10) noted an almost even split, ranging from 60% male to 60% female, four operators noted significant weightings in favour of males, with one operator stating that 95% of their clients were male.

**Question # 4** asked for the annual family income of clients. The results were too varied to make any simple statements. The only 'general trend' was that for most operators, most of their client's family incomes were over \$40,000.

**Question # 5** asked for reasons clients gave for choosing the Yukon as their vacation destination. The results were typically one-word answers, and the general trend was that the majority of responses referred to the Yukon's naturalness as the most significant lure for clients. The actual responses were; Wilderness (11), Nature (5), Remoteness (5), Wildlife (4), Product Quality (3), Open spaces (2), Lure of the North (2), Northern Rivers (2), with Action, Adventure, Soft Adventures, Hunting and Fishing each being mentioned once.

**Question # 6** asked for any interests that clients showed, other than wilderness travel. The responses were; Shopping (6), Historic Sites (6), Museums (5), First Nations Culture (5), with Gold Rush, Sightseeing, Fishing, Skagway and Special Events each being mentioned once.

**Question # 7** asked for any client habits that were strongly noted or had changed recently. The responses were; Later bookings (with 1 – 2 months notice) (6), More Internet shopping, education and bookings (6), with Cost-conscious, Younger clients, Airfare concerns, Canceling for less expensive trips elsewhere, More impulse buying, More add on tour bookings, Dislike of customs line-ups, and Safety concerns each being mentioned once.

**Question # 8** asked for number of clients per trip, and **Question # 9** asked for number of trips per season. By combining these questions, a rough idea can be made of the number of clients per season that are traveling to the Yukon for these operators. The **Summer** range was from 30 to 430 clients, with an average (excluding high and low values) of about 75 clients/operator. The **Winter** range was from 9 to 200 clients, with an average (excluding high and low values) of about 35 clients/operator.

**Question # 10** asked for the rate per day charged to the clients for summer and winter trips. The Summer range was from \$120 to \$300 per client per day, with an average of \$195/client/day. The Winter range was from \$150 to \$500 per client per day, with an average of \$250/client/day.

**Question # 11** asked for the operator's revenue per client per day for summer and winter trips. The Summer range was from \$30 to \$175 per client per day. The Winter range was from \$30 to \$375 per client per day.

**Question # 12** asked for the estimated spending per client for costs that were not included in package pricing. These included pre and post trip hotel nights, meals, gift purchases, side trips, etc. The spending per client estimates ranged from \$420 to \$1,800, with most (9 out of 11 responses to the question) of the estimates lying between \$700 and \$1,450 giving an average of \$990 per client per trip.

**Comments** were asked for at the end of the survey. The following quotes are taken from this section.

- Move to cooperation with large companies or start to invite well known journalists.
- WTAY should start looking at Travel Trade instead of Direct Marketing.
- (Our guests) want an authentic experience but want the creature comforts as well.
- We need (Tourism Yukon) to brand the Yukon as the authentic alternative to Alaska, not to sell our trips.
- (Our guests want) the wilderness (to) remain untouched.
- Anxious that hunting and fishing opportunities will remain as is with licensed guide outfitters.
- Largest challenges come from air travel costs and service but Air North may help.
- YTG marketing has not resulted in conversions, Milepost and other sources have.
- (Potential clients) need reassurance on winter conditions – they think Alaska is fine, but Yukon is terrible. YTG web site could address this.

## **Financial Contribution of the Wilderness Tourism Industry:**

Most of the information gathered by the survey is easily read from the Survey Results or by directly consulting the results summary in Appendix B. One thing that does not easily register is the financial contribution of the Wilderness Tourism Industry to the general Tourism Industry and the Yukon as a whole. By using the responses to Questions 8, 9, 10, 11, and 12, one can make rough calculations to arrive at an estimate of this financial contribution.

By calculating the number of clients per season and the rates charged per client per day (in each season) we can suggest that the ‘average client’ spends about \$2,730 per trip in summer (based on a 14 day trip) and about \$1,750 per trip in the winter (based on a 7 day trip) on their wilderness vacation package; and additionally spends about \$1,000 on items not included in their package costs.

Once again, using averages for the number of clients per operator (75 in summer, 35 in winter); this suggests that the 14 Wilderness Tourism Operators who replied to the WTAY survey were responsible for an estimated \$3.1 Million in gross revenues brought into the Yukon Territory, with an additional amount of \$1.2 Million brought in to the Yukon but directed to other (i.e. non-wilderness tourism) Yukon businesses, for a combined total revenue stream of \$4.3 Million.

The 14 operators in this survey represent approximately 25% of WTAY’s 2002 membership businesses, and just over 10% of all wilderness tourism business based in the Yukon (approx. 120). In attempting to estimate the total contribution of the wilderness tourism industry, it is recognized that not all Yukon wilderness tourism businesses operate at the levels of those represented in the returned surveys, but that they do contribute to the revenue generated by the wilderness tourism industry as a whole. If the assumption is made that this survey is an accurate representation of the wilderness tourism industry as a whole, then these financial contribution numbers should be multiplied by a factor of four (i.e. the survey represents 25% of WTAY members) to eight (i.e. the survey represents just over 10% of wilderness tourism operators) to include wilderness tourism businesses that did not reply to this survey. Choosing a mid-range multiplier of 6 gives an estimate for the total wilderness tourism industry’s contribution to the Yukon’s economy as approximately \$26.3 Million per year.

*See Appendix C for a summary of calculations and assumptions used to derive these figures.*

**Appendix A: Blank Survey Form** (four pages)



Dear Wilderness Tourism Operator,

We need your help! Here is your chance to provide direct input into Tourism Yukon’s marketing of Yukon adventure travel. WTAY is conducting a survey of our members to establish trends, based on our operators’ experiences. We are looking for information from independent owners/operators about the demographics of your “Wilderness Traveler” clients. This information will be used to identify key ‘target markets’ and to help get government to understand the needs of Yukon Wilderness Tourism Operators when making future marketing decisions. We want to generate information about “Wilderness Travelers” as a general, target group. **All information received will be treated as CONFIDENTIAL. We are not asking you to identify your business. No information will be released that relates to any individual company.**

Please answer the following questions, and feel free to include further comments.

1. List the top three cities or regions your clients come from each of the following world areas:

**United States:** The three most common States are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

The three most common cities in these states are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

**Canada:** The three most common Provinces/Territories are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

The three most common cities in these Provinces/Territories are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

**Europe:** The three most common countries are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

The three most common cities in these countries are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

**Other:** The three most common countries *not mentioned above* are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

The three most common cities in these countries are:

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

From all of the above mentioned locations, list the top three 'most common' origins of your clients, starting from the most common location and :

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

2. Give a general idea of the age of your clients (fill in a percentage for each category):

18-25 \_\_\_\_\_ 26-39 \_\_\_\_\_ 40-55 \_\_\_\_\_ over 55 \_\_\_\_\_

3. Give a general idea of the gender of your clients:  
(fill in a percentage for each category)

Male \_\_\_\_\_ Female \_\_\_\_\_

4. Give a general idea of the annual family income of your clients:  
(fill in a percentage for each category)

Less than \$40,000 \_\_\_\_\_ \$40-70,000 \_\_\_\_\_ \$70-100,000 \_\_\_\_\_

\$100-150,000 \_\_\_\_\_ More than \$150,000 \_\_\_\_\_

5. What are the most frequent reasons given by your clients to vacation in the Yukon? (i.e. Action, Wilderness, Culture, etc.)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



6. What interests (other than wilderness travel) do your clients have while on vacation? (i.e. Museums, Historic Sites, First Nations Culture, Shopping, etc.)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

7. Describe any common practices (or changes) you have noticed regarding your clients booking habits.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

The contribution of the Wilderness Sector to the total Tourism Industry is often poorly reflected in 'general' tourism statistics. The following questions are intended to establish a better idea of the positive impact of the Wilderness Tourism Industry:

8. Give an idea of the average number of people on one of your trips.

Winter \_\_\_\_\_ Summer \_\_\_\_\_

9. How many trips would you run in an average year?

Winter \_\_\_\_\_ Summer \_\_\_\_\_

10. What is the daily rate per person that you charge for your winter and summer trips?

Winter \$\_\_\_\_\_per day/per person      Summer \$\_\_\_\_\_per day/per person

11. The financial yield of Wilderness Tourism is frequently being compared to other tourism sectors. What would you estimate as your daily revenue, less costs, per person for your winter and summer trips?

Winter \$\_\_\_\_\_per day/per person      Summer \$\_\_\_\_\_per day/per person



**Appendix B: Compiled Survey Results** (four pages)

**Question # 1 U.S.**

	<b>3 most common States</b>				
Illinois	California	Washington D.C.	Washington	Oregon	Maine
	5		4	2	
New York	Michigan	Pennsylvania	Minnesota	Idaho	Montana
4	3	2	2		
	<b>U.S. 3 most common Cities</b>				
Chicago	Los Angeles	Washington	New York	Milwaukee	Lancaster
	2		4		
Fairbanks	San Francisco	Seattle			
	<b>Canada 3 most common Provinces</b>				
Alberta	Ontario	B.C.	Quebec		
10	10	8			
	<b>Canada 3 most common Cities</b>				
Edmonton	Ottawa	Vancouver	Calgary	Toronto	Montreal
3		6	6	7	
	<b>Europe 3 most common Countries</b>				
Germany	France	Austria	Switzerland	Netherlands	UK
13	3	8	8		5
Norway	New Zealand	Sweden			
	<b>Europe 3 most common Cities</b>				
Hamburg	Paris	Vienna	London	Barcelona	Munich
	3		3		2
Frankfurt	Wein	Selzach			
	<b>Other 3 most common Countries</b>				
France	Italy	Australia	South Africa	Japan	
		4			
	<b>Other 3 most common Cities</b>				
Sydney (Aus)	Cape Town	Tokyo			
	<b>Overall 3 most common origins</b>				
Germany	France	Austria	Switzerland	Ontario	U.S.
7		3	5	2	5
Toronto	Calgary	Vancouver	Canada	Europe	U.K.
			3		2

**Question # 2**

	<b>Client ages (as a %)</b>		
18 - 25	26 - 39	40 - 55	over 55
10	40	30	20
10	20	50	20
10	20	20	50
10	30	10	50
0	10	80	10
10	30	50	10
3	7	45	45
20	60	20	0
15	50	25	10
25	25	40	10
0	25	75	0
15	25	45	15

0	30	40	30
5	35	35	25

**Question # 3 Client gender (as a %)**

Male	Female
45	55
50	50
80	20
50	50
90	10
60	40
50	50
50	50
60	40
95	5
40	60
50	50
55	45
70	30

**Question # 4 Family Income (as a %)**

<\$40 K	\$40-70 K	\$70-100 K	\$100-150 K	>\$150 K	
10	10	40	30	10	
5	15	35	30	10	
25	10	10	20	35	
0	0	10	30	60	
10	80	10	0	0	
0	5	10	75	10	
0	0	80	20	0	
20	10	10	10	50	
?	?	X	?	?	???
0	10	45	20	25	
5	60	20	14	1	

**Question # 5 Reasons for choosing Yukon**

Wilderness	Nature	Open spaces	Remoteness	Lure of the North	Soft Adventures
11	5	2	5	2	
Wildlife	Action/Adventure	Product Quality	Northern Rivers	Hunting	Fishing
4	2	3	2		

**Question # 6 Other Interests**

Shopping	Museums	First Nations culture	Historic Sites	Gold Rush	Sightseeing
6	5	5	6		
Skagway	Special Events				

**Question # 7 Client habits (or changes)**

Internet bookings, shopping, educated		Late bookings (1-2 month advance)	
6		6	
Dislike customs lineups	Cost-conscious	Younger clients	Cancel for elsewhere
Add on tour bookings	More impulse buying	Safety	Airfare concerns

**Question # 8****# of clients/trip**

Summer	Winter
100 o-night/500 day tour	200 o-night/10 day tour
4 to 6	2
8	3
10	5
10	2
8	n/a
12	n/a
4	n/a
8	3
90%	10%
10	n/a
2 to 24	2long/4short
5	n/a

N.B. These #s seem high, I think they gave seasonal totals

N.B. Misunderstood question

**Question # 9****# of trips/year**

Summer	Winter
10 o-night/100 day tour	50 o-night/2 day tour
12	5
15	10
7	13
50	10
12	n/a
36	n/a
10	n/a
11	3
90%	10%
8	n/a
42	20long/40short
6	n/a

N.B. Misunderstood question

**Question # 10****\$/day/person charge**

Summer	Winter
\$120	\$210
\$190	\$240
\$180	\$150
\$250	\$500
\$200	\$200
n/a	n/a
\$300	n/a
\$230	n/a
\$185	\$260
\$200	\$200
\$150	n/a
\$25	\$300long/\$100short
\$120	n/a

**Question # 11****\$/day/person revenue**

Summer	Winter
\$30	\$60
\$50	\$70
\$100	\$30
\$175	\$375
\$80	\$80
\$100	n/a
???	n/a
\$100	n/a
???	???
\$50	\$50
\$50	n/a
\$18	\$160long/\$60short
\$50	n/a

**Question # 12****Average spending amounts**

Summer	Winter	No Season specified
\$1,300	\$900	\$700
\$1,450	\$1,000	\$750
\$950		\$1,800
\$700		
\$900		
\$420		

## Appendix C: Calculations (this page)

- used to derive “Financial Contribution of Wilderness Tourism Industry” amounts.

	Summer	Winter
Average number of clients per operator: - from Questions # 8 & #9	75	35
Average \$/day/client: - from Question #10	\$ 195.00	\$ 250.00
<i>Assumption: Average trip length</i>	<i>14 days</i>	<i>7 days</i>
Cost per trip per client: (\$/day x trip length)	\$ 2,730.00	\$ 1,750.00
Average gross revenue: (# of clients x cost/trip)	\$ 204,750.00	\$ 61,250.00
Total gross revenue: (Average revenue x # of operators*) * 13 summer, 8 winter operators	\$2,661,750.00	\$ 490,000.00
<b>Total gross revenue combined: (summer + winter)</b>		<b>\$3,141,750.00</b>
Total number of clients: (# clients/operator x # operators)	975	280
Average amount of ‘other expenditures’ per client: - from Question # 12	\$ 990.00	\$ 990.00
Total ‘other expenditures’ revenue: (# clients x \$/client)	\$ 965,250.00	\$ 277,200.00
<b>Total ‘other expenditures’ revenue combined: (summer + winter)</b>		<b>\$1,242,450.00</b>
<b>Total contribution of WTAY survey respondents:</b> (Total gross revenue combined + Total ‘other expenditures’ revenue combined)		<b>\$4,384,200.00</b>
<b>Estimated total contribution of Wilderness Tourism Industry:</b> (Total contribution of WTAY survey respondents x 6)		<b>\$26,305,200.00</b>