



2020 Yukon Tourism Sector Needs Assessment

Department of Tourism and Culture

November 9, 2020

**Yukon**

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Highlights



34% fewer tourism businesses will be operating year-round in 2020/21



86% of businesses reported having reduced revenue from earned income (e.g. sales, bookings etc.)



38% of respondents changed their product offering



84% of tourism businesses accessed at least one COVID-19 funding support program



3.1 average number of COVID-19 funding support programs accessed



68% of respondents accessed business and/or personal financial reserves



57% of businesses do not expect to have sufficient cash flow to cover business expenses for the next 6 months



70% of respondents' mental health is worse now than it was before COVID-19



Introduction

The 2020 Yukon Tourism Sector Needs Assessment was developed by the department of Tourism and Culture in consultation with the Tourism Industry Association of Yukon (TIAY) and the Wilderness Tourism Association of Yukon (WTAY), and conducted the Yukon Bureau of Statistics. The purpose of this survey was to gather information on the impacts of COVID-19 on the tourism sector in Yukon. Information provided will aid in identifying gaps and help develop and provide supports that are effective to support the sector through the pandemic. The survey was designed to collect information specifically from Yukon tourism businesses. The survey excluded not-for-profit organizations (e.g. museums and cultural centres), tourism organizations, and other government organizations.

Methodology summary

Tourism businesses were contacted by email to self-complete the survey online between September 28 and October 11, 2020. Respondents had the option to self-complete in French if requested. Operators not on the distribution list were encouraged through tourism non-governmental organizations, including TIAY, WTAY, l'association franco-yukonnaise (l'AFY), and chambers of commerce. A total of 334 survey invitation links were sent to businesses. A total of 123 responses were received, with 116 responses in scope, for a response rate of 34.7%. The results were not weighted.

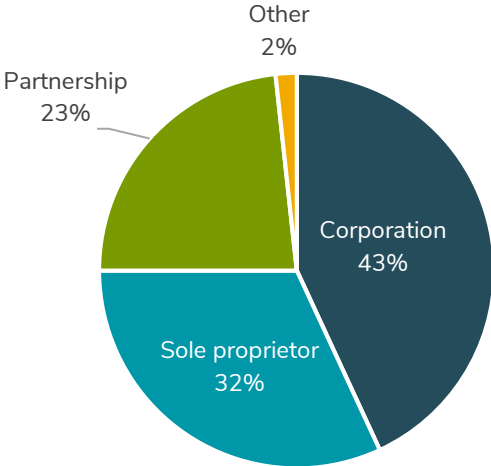
Throughout the report, some values may not sum due to rounding.

Results

Business overview

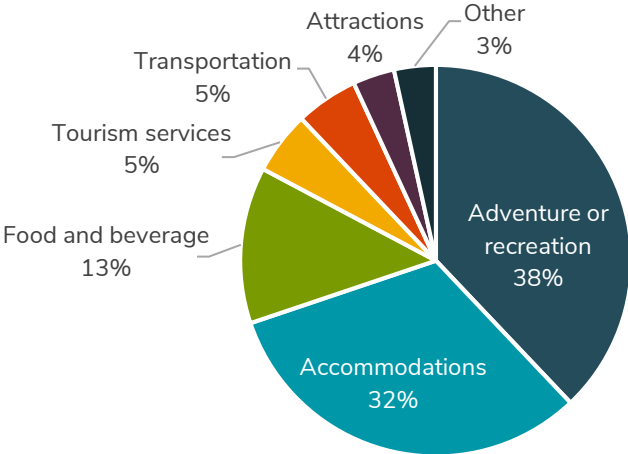
Approximately two in five (43%) responding tourism businesses reported being a corporation other than a First Nation development corporation, while another third (32%) reported being a sole proprietor. Nearly another quarter (23%) reported being a partnership.

Figure 1: Business ownership



The majority of respondents reported being in either the adventure or recreation (38%), accommodations (32%) or food and beverage (13%) sectors.

Figure 2: Sector type



The three largest sectors (accommodations, adventure or recreation and food and beverage) were most likely to be corporations.

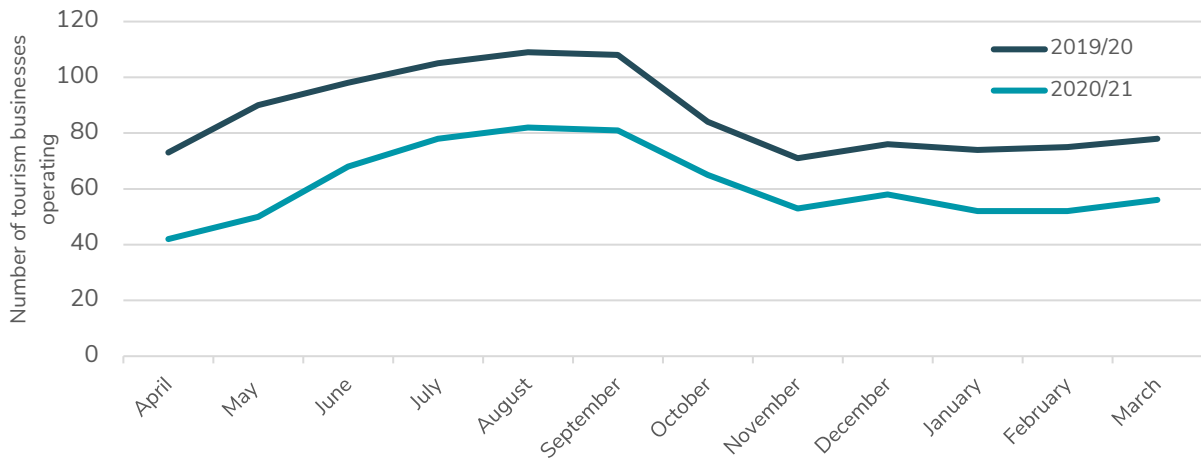
Table 1: Sector by ownership

	Accommodations	Adventure or recreation	Food & beverage	Other businesses	Total
Sole proprietor	22%	31%	33%	50%	32%
Partnership	25%	27%	27%	10%	23%
Corporation	53%	40%	40%	35%	43%
Other	0%	2%	0%	5%	2%
Total businesses	36	45	15	20	116

Operating season

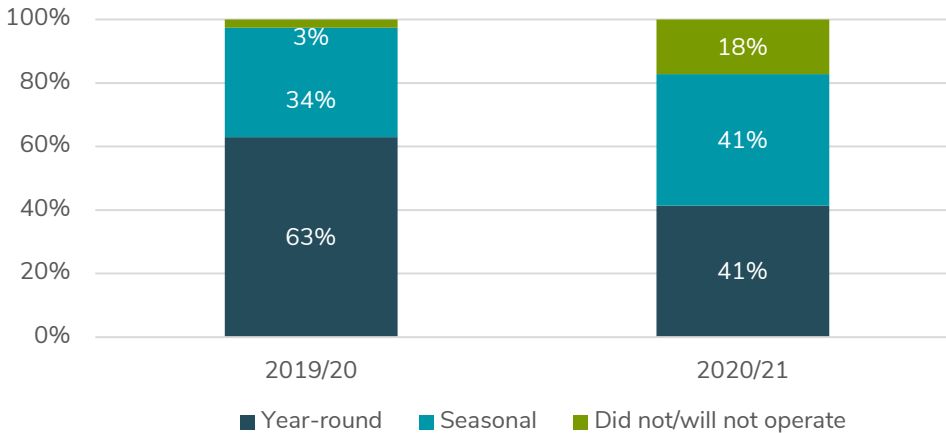
In 2019/20, prior to the pandemic, 112 tourism businesses reported operating all or part of the year. In 2020/21, this number fell to 80 tourism businesses. On average, the number of tourism businesses operating per month fell 29% in 2020/21 compared to 2019/20.

Figure 3: Months businesses did/will operate



In 2019/20, 63% of responding Yukon tourism businesses (73) reported that they were operating year-round, meaning they operated at least eight months, or two-thirds of the year. In 2020/21, this number fell to 48 businesses, a decrease of 34%.

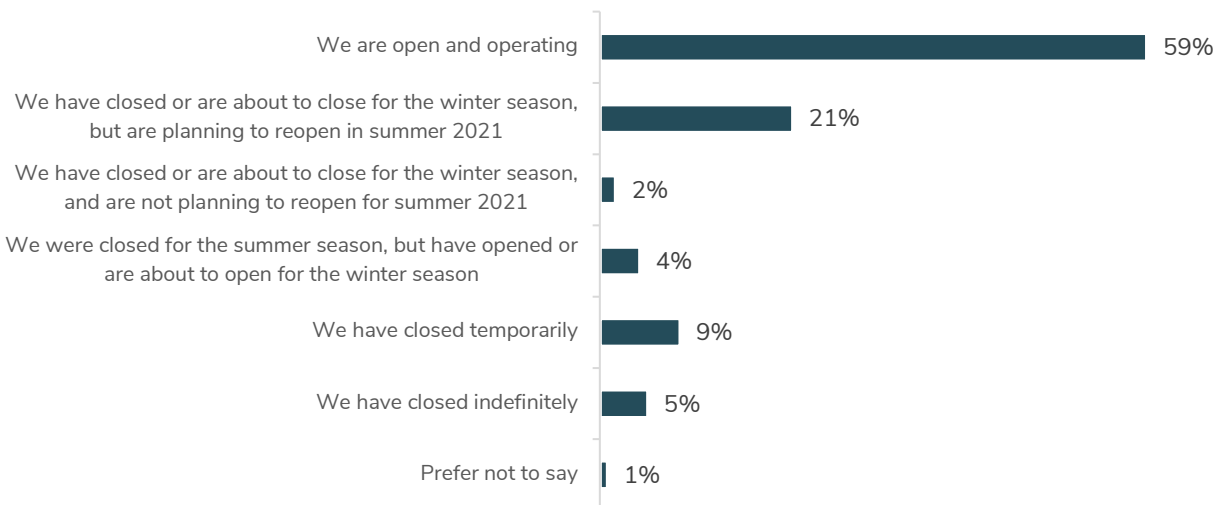
Figure 4: Seasonal businesses



Of the 25 fewer businesses operating year round in 2020/21, eight did not operate in the summer, but expect to operate in the winter, while 17 do not expect they will operate at all in 2020/21. The majority of the businesses reporting that they will not operate this year were in the adventure or recreation sector.

As of September 1, 2020, 59% of respondents indicated that their business was open and operating. Another 14% indicated that they have closed temporarily or indefinitely.

Figure 5: Business status as of September 1, 2020



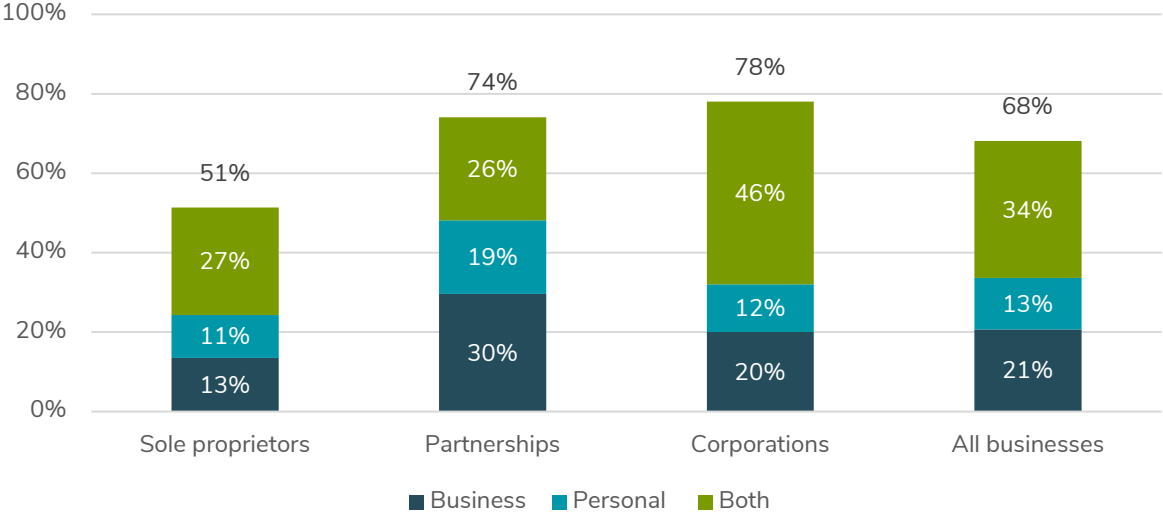
Impacts of COVID-19

More than one-third (38%) of Yukon tourism businesses were able to pivot by changing their product offering. Even still, nearly all tourism businesses (94%) reported being negatively impacted due to COVID-19. The most commonly reported impacts were:

- Reduced revenue from earned income (e.g. sales, bookings etc.) (86%)
- Reduced demand for product offering (84%)
- Need to access business financial reserves (55%)
- Need to access personal financial reserves (47%).
- Disruption of supplies or services provided by partners (40%).

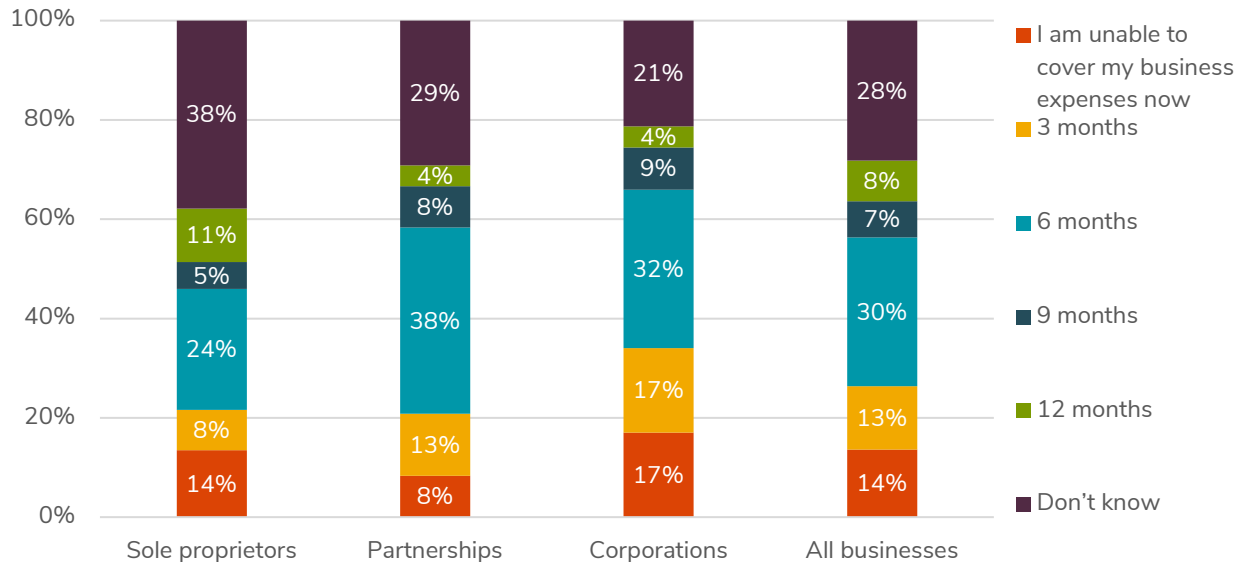
More than two-thirds (68%) of businesses reported needing to access business and/or personal financial reserves. The need to and type of reserves accessed varied slightly by ownership type.

Figure 6: Accessed financial reserves by ownership type



Fourteen per cent (14%) of respondents reported that they were unable to cover their business expenses now or will be unable to in the next 3 months (13%) to 6 months (30%). Nearly another third (28%) of respondents did not know how long they would be able to cover their business expenses.

Figure 7: How long respondents expect to be able to cover their business expenses



'Prefer not to say' removed.

Funding supports

The majority (84%) of responding tourism businesses accessed at least one COVID-19 support program. On average, tourism businesses accessed three COVID-19 support programs. Again, this varied by business ownership, with sole proprietors reporting having accessed an average of two programs, partnerships reporting having accessed three programs and corporations reporting having accessed an average of four support programs.

On average, accommodations, adventure or recreation, food and beverage and other tourism businesses accessed three funding programs and tourism services and transportation businesses accessed an average of four support programs. Overall, the most frequently accessed support programs included:

- Northern Business Relief Fund (NBRF) (52%)
- Canada Emergency Business Account (CEBA) interest-free loans (52%)
- Yukon Business Relief Program (YBRP) (51%)
- Tourism Cooperative Marketing Fund (TCMF) (42%)
- Canada Emergency Wage Subsidy (CEWS) (41%)

Of the 19 tourism businesses who did not access any COVID-19 support programs, the most commonly cited reasons were:

- They did not believe they were eligible (63%);
- It was too complicated to apply (32%); or
- The business did not require support (26%).

Respondents were asked to identify gaps with current funding programs. Nearly two in five respondents identified funding program length being too short (39%) and one-third identified funding to cover core operating costs outside of the operating season (32%) as the most significant gaps.

Figure 8: Most significant gaps in current funding programs (top 10 shown)



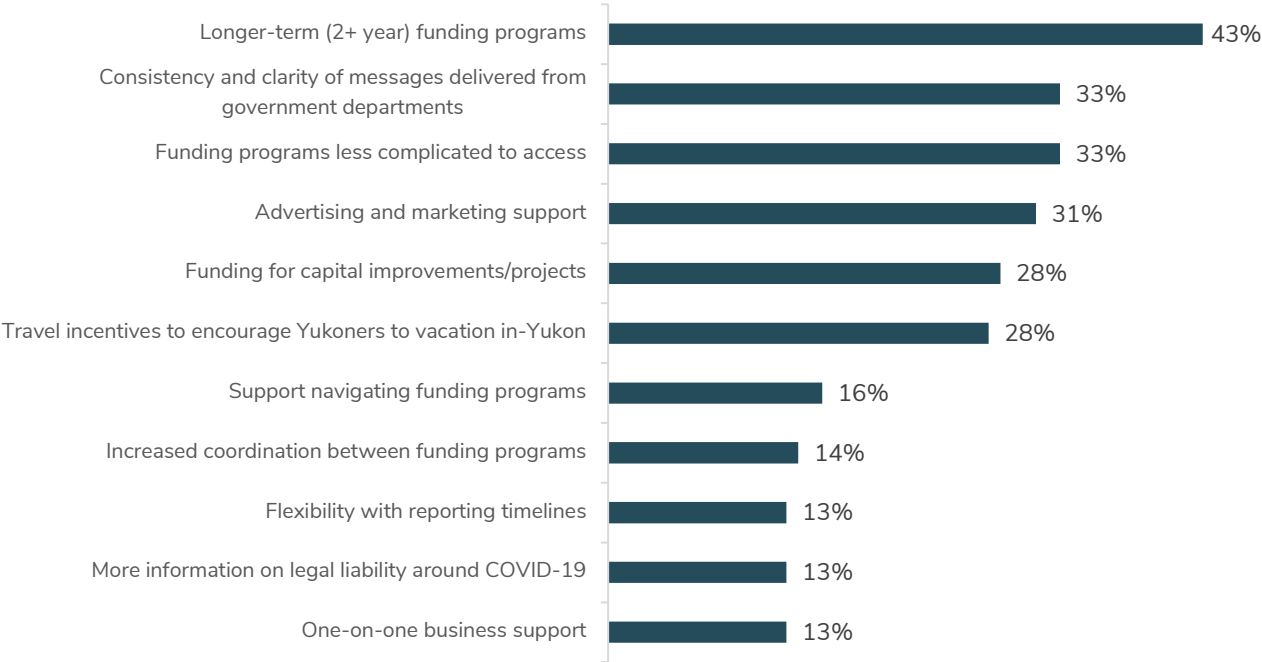
The gap identified most frequently by sole proprietors was income subsidy for sole proprietors.

Table 2: Top five gaps in current funding programs by ownership type

	Sole proprietor	Partnership	Corporation
1	Income subsidy for sole proprietors	Funding programs need to be longer term (i.e. 2+ years)	Funding programs need to be longer term (i.e. 2+ years)
2	Funding to cover core operating costs outside of operating season	Funding to cover core operating costs outside of operating season	Funding to cover core operating costs outside of operating season
3	Funding to cover insurance costs	Income subsidy for self-employed	Debt-forgiveness
4	Income subsidy for self-employed	Funding to cover insurance costs	Income subsidy for self-employed
5	Funding programs need to be longer term (i.e. 2+ years)	Timelines for funding programs do not align with operational needs	Timelines for funding programs do not align with operational needs

With an eye to the future, businesses were also asked to identify the most important supports that governments can provide to help their business mitigate the challenges of COVID-19. More than two in five identified funding programs needing to be longer (43%), and a third identified consistency and clarity of messages delivered from government departments (33%) and making funding programs less complicated to access (33%).

Figure 9: Most important supports government can provide (top 11 shown)

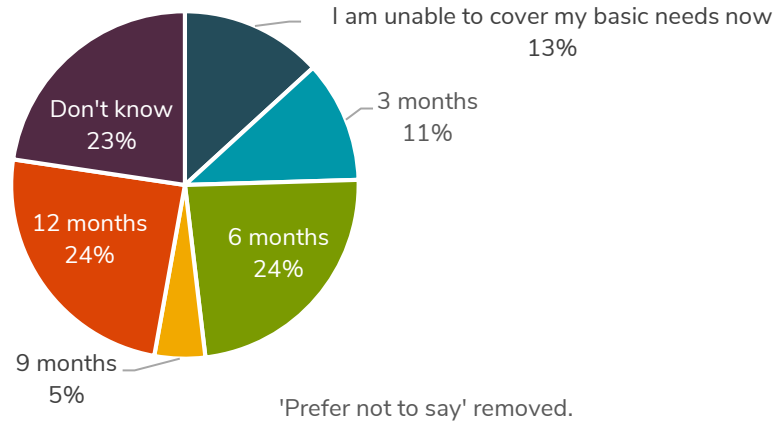


Personal wellbeing

Of the businesses who responded to this question (106 businesses), 13% indicated they are unable to cover their basic needs (e.g. food, shelter, health/safety) for themselves, their dependents and their animals now. Another 11% expect they will not be able to cover their basic needs in 3 months, and 24% for the next 6 months. Nearly a quarter of respondents (23%) indicated they do not know how long they will be able to cover their basic needs.

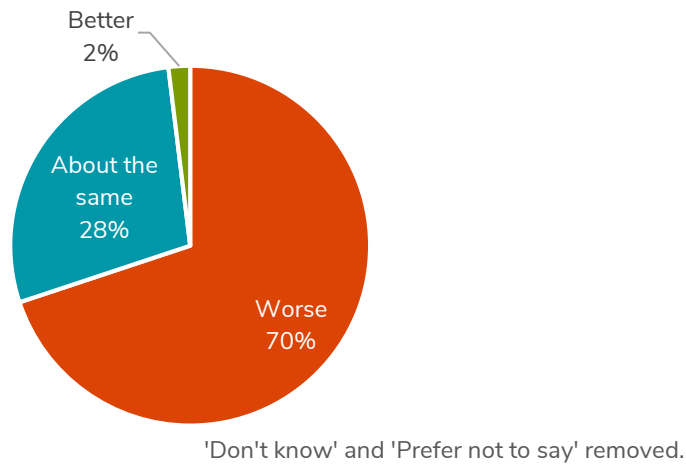


Figure 10: How long respondents expect to be able to cover their basic needs



One in 10 respondents (11%) elected not to answer the question related to their mental health status. Of those who did respond (103 businesses), the majority (70%) indicated that their mental health is worse now than it was before COVID-19 (26% significantly worse, 44% somewhat worse).

Figure 11: Mental health status now compared to before COVID-19



Appendix A: Frequency tables

Q1.1. Which months in 2019/20 did your business operate?	Frequency	Percent
April 2019	73	63%
May 2019	90	78%
June 2019	98	84%
July 2019	105	91%
August 2019	109	94%
September 2019	108	93%
October 2019	84	72%
November 2019	71	61%
December 2019	76	66%
January 2020	74	64%
February 2020	75	65%
March 2020	78	67%
This business did not operate between April 2019 and March 2020	4	3%
Total	116	100%

Q1.2 Which months in 2020/21 did/will your business operate?	Frequency	Percent
April 2020	42	36%
May 2020	50	43%
June 2020	68	59%
July 2020	78	67%
August 2020	82	71%
September 2020	81	70%
October 2020	65	56%
November 2020	53	46%
December 2020	58	50%
January 2021	52	45%
February 2021	52	45%
March 2021	56	48%
This business did not operate between April 2020 and March 2021	19	16%
Not sure	17	15%
Total	116	100%

Q1.3 Is this business owned by:	Frequency	Percent
An individual (sole proprietor)	37	32%
Two or more individuals (partnership)	27	23%
A Yukon First Nation or a First Nation Development Corporation	1	1%
A corporation other than a First Nation Development Corporation	50	43%
Partnership with a First Nation Development Company	1	1%
Total	116	100%

Q1.4 Which sector does your business primarily represent?**(if your business represents more than one sector, please select the one that generates the highest revenue)**

	Frequency	Percent
Accommodations (e.g. hotel, lodge, B&B, etc.)	37	32%
Adventure or recreation (e.g. outfitting, dog sledding, horseback riding, northern lights viewing, guided day tour, etc.)	44	38%
Attraction (e.g. hot springs, mining tour, etc.)	4	3%
Food and beverage (e.g. restaurant, cafe, bar, brewery, agri-tourism, etc.)	15	13%
Tourism services (e.g. consultant, ad agency, travel agency, receptive tour operator, etc.)	6	5%
Transportation (e.g. airline, vehicle rentals, etc.)	6	5%
Other	4	3%
Total	116	100%

Q2.1 What is the current status of your business (as of September 1, 2020)?

	Frequency	Percent
We are open and operating	68	59%
We have closed or are about to close for the winter season, but are planning to reopen in summer 2021	24	21%
We have closed or are about to close for the winter season, and are not planning to reopen for summer 2021	2	2%
We were closed for the summer season, but have opened or are about to open for the winter season	5	4%
We have closed temporarily	10	9%
We have closed indefinitely	6	5%
Prefer not to say	1	1%
Total	116	100%

Q2.2 If existing funding programs continue, how long do you expect you will have sufficient cash flow to cover your business expenses?

	Frequency	Percent
I am unable to cover my business expenses now	15	13%
I am able to cover my business expenses for the next 3 months	14	12%
I am able to cover my business expenses for the next 6 months	33	28%
I am able to cover my business expenses for the next 9 months	8	7%
I am able to cover my business expenses for the next 12 months	9	8%
Don't know	31	27%
Prefer not to say	6	5%
Total	116	100%



Q 2.3 Has your business experienced any of the following impacts due to COVID-19? (select all that apply)

	Frequency	Percent
Reduced revenue from earned income (e.g. sales, bookings etc.)	100	86%
Reduced demand for product offering	97	84%
Need to access business financial reserves	64	55%
Need to access personal financial reserves	55	47%
Disruption of supplies or services provided by partners	46	40%
Change in product offering	44	38%
Increased or sustained absences of staff	28	24%
Challenges related to staff or business working remotely	18	16%
Need to sell capital assets	17	15%
Increased need for mental health and wellness supports	16	14%
Budgetary implications related to strains on the economy (e.g. investments, stock market, interest etc.)	13	11%
Increased demand for product offering	4	3%
Need to revisit or institute remote work or sick leave policies	4	3%
Increased revenue from earned income (e.g. sales, bookings etc.)	2	2%
Other	3	3%
No impacts	1	1%
Prefer not to say	1	1%
Total	116	100%

Q 3.1 Have you received financial support from any of the following programs specifically related to COVID-19? (select all that apply)

	Frequency	Percent
Federal government funding		
Business Credit Availability Program (BCAP)	1	1%
Northern Business Relief Fund (NBRF) - CanNor	60	52%
Other CanNor programs	5	4%
Canada Emergency Business Account (CEBA) interest-free loans	60	52%
Canada Emergency Commercial Rent Assistance (CECRA)	1	1%
Canada Emergency Student Benefit (CESB)	0	0%
Canada Emergency Response Benefit (CERB)	36	31%
Canada Emergency Wage Subsidy (CEWS)	47	41%
Canada Recovery Benefit (CRB)	3	3%
Canada Recovery Caregiving Benefit (CRCB)	0	0%
Canada Recovery Sickness Benefit (CRSB)	0	0%
Canada Summer Jobs Program	3	3%
Work-share program	1	1%
Other sector-specific federal support programs (e.g. Emergency Support Fund for Cultural, Heritage and Sport organizations, Farm Credit Canada program, etc.)	1	1%
Government of Yukon funding		
Product Development Partnership Program (PDPPP)	0	0%
Tourism Cooperative Marketing Fund (TCMF)	49	42%
Yukon Business Relief Program	59	51%
Yukon Essential Workers Income Support Program	2	2%
Yukon Paid Sick Leave Rebate for employers and self-employed	2	2%
Yukon Temporary Support for Events Funding Program	6	5%
Other sector-specific Yukon support programs (e.g. Arts Fund special intake)	0	0%
Other funding programs		
PIVOT program	12	10%
Elevate Tourism Program	8	7%
Indigenous Tourism Association of Canada (ITAC) funding programs	3	3%
Other	3	3%
Don't know / Prefer not to say	2	2%
None of the above - This business did not access any COVID-19 support programs	19	16%
Total	116	100%



**Q 3.1.1 Why have you not accessed any COVID-19 support programs?
(select all that apply)**

	Frequency	Percent
Was not aware of programs	3	16%
Do not believe I was eligible to apply	12	63%
Funding application was declined	1	5%
Too complicated to apply	6	32%
Missed deadlines	1	5%
Program funding ran out	0	0%
Didn't have the resources to apply	3	16%
My business did not require support	5	26%
Don't know / Prefer not to say	2	11%
Total	19	100%

**Q 3.2 In your opinion, what are the most significant gaps that exist in
current funding programs? (select up to 5)**

	Frequency	Percent
Assistance developing marketing materials (e.g. website upgrades, graphic design, social media etc.)	21	18%
Debt-forgiveness	25	22%
Enhanced sickness benefits	3	3%
Funding caps for fixed operating costs are too low	20	17%
Funding programs need to be longer term (i.e. 2+ years)	45	39%
Funding to cover core operating costs outside of operating season	37	32%
Funding to cover insurance costs	29	25%
Funding to offset home-based business expenses	16	14%
Funding to recover costs of livestock, animal feed and veterinary expenses	7	6%
Income subsidy for self-employed	32	28%
Income subsidy for sole proprietors	19	16%
Interest-free loans for businesses temporarily closed	11	9%
Mental health supports	9	8%
Timelines for funding programs do not align with operational needs	24	21%
No gaps in current funding programs	8	7%
Don't know / Prefer not to say	20	17%
Total	116	100%

Q 3.3 What are the most important supports government can provide to help your business mitigate the challenges of COVID-19? (select up to 5)

	Frequency	Percent
Advertising and marketing support	36	31%
Assistance developing deposit/refund best practices	9	8%
Consistency and clarity of messages delivered from government departments	38	33%
Flexibility with reporting timelines	15	13%
Funding for capital improvements/projects	33	28%
Funding programs less complicated to access	38	33%
Improved sickness benefits	2	2%
Increased coordination between funding programs	16	14%
Increased government capacity to process applications	6	5%
Loan programs	8	7%
Longer-term (2+ year) funding programs	50	43%
Mental health supports for operators or staff	10	9%
More information on legal liability around COVID-19	15	13%
One-on-one business support	15	13%
Skills enhancement training	2	2%
Support covering deposits/refunds	7	6%
Support developing a recovery strategy	8	7%
Support developing cancellation policies	4	3%
Support developing or revising an operational plan	5	4%
Support navigating funding programs	18	16%
Support to alter product offering	6	5%
Support to submit funding applications	14	12%
Support working with the travel trade	11	9%
Travel incentives to encourage Yukoners to vacation in-Yukon	32	28%
No additional supports needed	2	2%
Don't know/ Prefer not to say	6	5%
Total	116	100%

Q. 4.1 How long do you expect you will have sufficient cash flow to cover the basic needs (e.g. food, shelter, health/safety) for yourself, your dependents and animals?

	Frequency	Percent
I am unable to cover my basic needs now	14	12%
I am able to cover my basic needs for the next 3 months	12	10%
I am able to cover my basic needs for the next 6 months	25	22%
I am able to cover my basic needs for the next 9 months	5	4%
I am able to cover my basic needs for the next 12 months	26	22%
Don't know	24	21%
Prefer not to say	10	9%
Total	116	100%

Q. 4.2 As a business owner, compared to before COVID-19, how would you say your mental health is now?

	Frequency	Percent
Significantly worse now	27	23%
Somewhat worse now	45	39%
About the same	29	25%
Somewhat better now	1	1%
Much better now	1	1%
Don't know/ Prefer not to say	13	11%
Total	116	100%

Appendix B: Survey questionnaire

Part 1: Background business information:

Q 1.1 Which months in 2019/20 did your business operate? (select all that apply)

- | | | |
|--|---|--|
| <input type="checkbox"/> April 2019 | <input type="checkbox"/> August 2019 | <input type="checkbox"/> December 2019 |
| <input type="checkbox"/> May 2019 | <input type="checkbox"/> September 2019 | <input type="checkbox"/> January 2020 |
| <input type="checkbox"/> June 2019 | <input type="checkbox"/> October 2019 | <input type="checkbox"/> February 2020 |
| <input type="checkbox"/> July 2019 | <input type="checkbox"/> November 2019 | <input type="checkbox"/> March 2020 |
| <input type="checkbox"/> This business did not operate between April 2019 and March 2020 | | |

Q 1.2 Which months in 2020/21 did/will your business operate? (select all that apply)

- | | | |
|---|---|--|
| <input type="checkbox"/> April 2020 | <input type="checkbox"/> August 2020 | <input type="checkbox"/> December 2020 |
| <input type="checkbox"/> May 2020 | <input type="checkbox"/> September 2020 | <input type="checkbox"/> January 2021 |
| <input type="checkbox"/> June 2020 | <input type="checkbox"/> October 2020 | <input type="checkbox"/> February 2021 |
| <input type="checkbox"/> July 2020 | <input type="checkbox"/> November 2020 | <input type="checkbox"/> March 2021 |
| <input type="checkbox"/> This business did not/will not operate between April 2020 and March 2021 | | |

Q 1.3 Is this business owned by:

- An individual (sole proprietor)
- Two or more individuals (partnership)
- A Yukon First Nation or a First Nation Development Corporation
- A corporation, other than a First Nation Development Corporation
- Other (please specify): _____

Q 1.4 Which sector does your business primarily represent? (if your business represents more than one sector, please select the one that generates the highest revenue)

- Accommodations (e.g. hotel, lodge, B&B, etc.)
- Adventure or recreation (e.g. outfitting, dog sledding, horseback riding, northern lights viewing, guided day tour, etc.)
- Attraction (e.g. hot springs, mining tour, etc.)
- Food and beverage (e.g. restaurant, café, bar, brewery, agri-tourism, etc.)
- Tourism services (e.g. consultant, ad agency, travel agency, receptive tour operator, etc.)
- Transportation (e.g. airline, vehicle rentals, etc.)
- Other (please specify): _____

Part 2: Business status

Q 2.1 What is the current status of your business (as of September 1, 2020)?

- We are open and operating
- We have or are about to close for the winter season, but are planning to reopen in summer 2021
- We have or are about to close for the winter season, and are not planning to reopen for summer 2021
- We were closed for the summer season, but have or are about to open for the winter season
- We have closed temporarily
- We have closed indefinitely

- Prefer not to say

Q. 2.2 If existing funding programs continue, how long do you expect you will have sufficient cash flow to cover your business expenses?

- I am unable to cover my business expenses now
- I am able to cover my business expenses for the next 3 months
- I am able to cover my business expenses for the next 6 months
- I am able to cover my business expenses for the next 9 months
- I am able to cover my business expenses for the next 12 months
- Don't know
- Prefer not to say

Q 2.3 Has your business experienced any of the following impacts due to COVID-19? (select all that apply)

- Increased demand for product offering
- Reduced demand for product offering
- Change in product offering
- Disruption of supplies or services provided by partners
- Increased or sustained absences of staff
- Challenges related to staff or business working remotely
- Need to revisit or institute remote work or sick leave policies
- Increased need for mental health and wellness supports
- Increased revenue from earned income (e.g. sales, bookings, etc.)
- Reduced revenue from earned income (e.g. sales, bookings, etc.)
- Need to access business financial reserves
- Need to access personal financial reserves
- Need to sell capital assets
- Budgetary implications related to strains on the economy (e.g. investments, stock market, interest, etc.)
- No impacts
- Prefer not to say
- Other (please specify) _____

Part 3: Funding supports

Q 3.1 Have you received financial support from any of the following programs specifically related to COVID-19? (select all that apply)

Federal government funding:

- Business Credit Availability Program (BCAP)
- Northern Business Relief Fund (NBRF) – CanNor
- Other CanNor programs
- Canada Emergency Business Account (CEBA) interest-free loans
- Canada Emergency Commercial Rent Assistance (CECRA)
- Canada Emergency Student Benefit (CESB)
- Canada Emergency Response Benefit (CERB)
- Canada Emergency Wage Subsidy (CEWS)
- Canada Recovery Benefit (CRB)
- Canada Recovery Caregiving Benefit (CRCB)



- Canada Recovery Sickness Benefit (CRSB)
- Canada Summer Jobs Program
- Work-share program
- Other sector-specific federal support programs (e.g. Emergency Support Fund for Cultural, Heritage and Sport organizations, Farm Credit Canada program, etc.)

Government of Yukon funding

- Product Development Partnership Program (PDPP)
- Tourism Cooperative Marketing Fund (TCMF)
- Yukon Business Relief Program
- Yukon Essential Workers Income Support Program
- Yukon Paid Sick Leave Rebate for employers and self-employed
- Yukon Temporary Support for Events Funding Program
- Other sector-specific Yukon support programs (e.g. Arts Fund special intake)

Other funding programs:

- PIVOT program
- Indigenous Tourism Association of Canada (ITAC) funding programs
- Other (please specify): _____
- Don't know
- Prefer not to say
- None of the above – This business did not access any COVID-19 support programs

Q 3.1.1 IF NONE OF THE ABOVE: Why have you not accessed any COVID-19 support programs?
(select all that apply)

- Was not aware of programs
- Do not believe I was eligible to apply
- Funding application was declined
- Too complicated to apply
- Missed deadlines
- Program funding ran out
- Didn't have the resources to apply
- My business did not require support
- Don't know
- Prefer not to say

Q 3.2 In your opinion, what are the most significant gaps that exist in current funding programs?
(select up to 5)

- Assistance developing marketing materials (e.g. website upgrades, graphic design, social media, etc.)
- Debt-forgiveness
- Enhanced sickness benefits
- Funding caps for fixed operating costs are too low
- Funding programs need to be longer term (i.e. 2+ years)
- Funding to cover core operating costs outside of operating season
- Funding to cover insurance costs
- Funding to offset home-based business expenses
- Funding to recover costs of livestock, animal feed and veterinary expenses
- Income subsidy for self-employed

- Income subsidy for sole proprietors
- Interest-free loans for businesses temporarily closed
- Mental health supports
- Timelines for funding programs do not align with operational needs
- Other (please specify): _____
- No gaps in current funding programs
- Don't know
- Prefer not to say

Q 3.3 What are the most important supports government can provide to help your business mitigate the challenges of COVID-19? (select up to 5)

- Advertising and marketing support
- Assistance developing deposit/refund best practices
- Consistency and clarity of messages delivered from government departments
- Flexibility with reporting timelines
- Funding for capital improvements/projects
- Funding programs less complicated to access
- Improved sickness benefits
- Increased coordination between funding programs
- Increased government capacity to process applications
- Loan programs
- Longer-term (2+ year) funding programs
- Mental health supports for operators or staff
- More information on legal liability around COVID-19
- One-on-one business support
- Skills enhancement training
- Support covering deposits/refunds
- Support developing a recovery strategy
- Support developing cancellation policies
- Support developing or revising an operational plan
- Support navigating funding programs
- Support to alter product offering
- Support to submit funding applications
- Support working with the travel trade
- Travel incentives to encourage Yukoners to vacation in-Yukon
- Other (please specify): _____
- No additional supports needed
- Don't know
- Prefer not to say

Part 4: Personal wellbeing

These next two questions are optional. Although response is not required, they will help us to better understand your current situation to better design government programs and supports.

Q. 4.1 How long do you expect you will have sufficient cash flow to cover the basic needs (e.g. food, shelter, health/safety) for yourself, your dependents and animals?

- I am unable to cover my basic needs now
- I am able to cover my basic needs for the next 3 months

- I am able to cover my basic needs for the next 6 months
- I am able to cover my basic needs for the next 9 months
- I am able to cover my basic needs for the next 12 months
- Don't know
- Prefer not to say

Q. 4.2 As a business owner, compared to before COVID-19, how would you say your mental health is now?

- Significantly worse now
- Somewhat worse now
- About the same
- Somewhat better now
- Much better now
- Don't know
- Prefer not to say

Part 5: Conclusion

Q 5.1 Please provide any comments or additional information you would like to share.

