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**Tourism - An Economic Diversification And  
Growth Opportunity For The Yukon & Northwest  
Territories**

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**TOURISM - AN ECONOMIC DIVERSIFICATION  
AND GROWTH OPPORTUNITY FOR THE YUKON  
& NORTHWEST TERRITORIES**

**Sector: Tourism**

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**Analysis/Review**

**Tourism Canada**

**TOURISM: AN ECONOMIC DIVERSIFICATION AND  
GROWTH OPPORTUNITY FOR THE  
YUKON AND NORTHWEST TERRITORIES**

**Canada**

**TOURISM: AN ECONOMIC DIVERSIFICATION AND GROWTH OPPORTUNITY  
FOR THE YUKON AND NORTHWEST TERRITORIES**

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**INTRODUCTION**

*D. Murray's  
assessment of  
Tourism in  
the NWT is  
much more  
convincing  
in showing  
the importance  
of this sector.*

Tourism plays an important role in the economy of the Yukon and Northwest Territories ("the Territories"). This fact has been recognized by the federal government which has invested close to \$18 million since 1981 to support tourism planning, the establishment, expansion or upgrading of tourism facilities and marketing under tourism sub-agreements and other tourism specific programming. (Annex A refers.) In total the two Territories have received 5.5% of federal tourism funding since 1981. In addition, there have been federal contributions to individual tourism projects through other departmental programs such as IRDP/SARDA and NEDP, often in combination with tourism program support.

*(not much given idea, infrastructure constrain  
and potential)*

**OVERVIEW OF THE TOURISM SECTOR**

In Canada, the tourism industry generates nearly \$24 billion in sales annually, accounts for 4% of Canadian GDP, and ranks third in foreign exchange earnings (\$6.8 billion). It produces some \$9.3 billion annually in taxes for all levels of government, of which \$4.9 billion accrue to the federal government itself. The tourism industry comprises approximately 60,000 businesses, 85% of which are small businesses with direct employment of 630,000 persons. Tourism also contributes to regional and community development, quality of life, the development of Canadian culture, and a protected and accessible environment.

In Canada, the tourism industry has experienced the highest growth rate of all major industrial sectors since 1975, mainly as a result of international tourism receipts. Between 1982 and 1988, Canada's international tourism receipts grew from \$2.6 billion to \$6.8 billion, for an annual growth rate of 11.7%.

*Reference to  
NWT studies  
Regional  
strategies,  
Marketing  
with many  
product development  
studies may be  
useful*

Opportunities for increased travel to Canada, including the Territories, have been identified by Tourism Canada research into international markets. More growth can be induced in key international markets, particularly in the U.S. and the Asia/Pacific through the provision of tourism products sought by selected high-yield market segments. Favourable exchange rate and prices, increased trade liberalization, airline deregulation, and the added awareness of Canada generated by Expo '86 in Vancouver and the 1988 Calgary Winter Olympics.

Tourism is a relatively young sector in the Territories and compared to many regions in Canada is at a much lower stage of development. For example, in the NWT the concept of tourism

*Planning, marketing, product development etc. also*

was introduced in most communities within the last ten years. This means that special developmental requirements exist such as the continued need for financial assistance in new/expansion/upgrading projects. Yet, tourism is considered one of the most significant and stable industries in the Territories. In both territories, tourism ranks second only to mining in annual revenues and employment. The tourism sector not only provides income and employment but also an important opportunity for entrepreneurial and skill development which, in many instances, is compatible with or complimentary to local or aboriginal life-styles and cultural aspirations. *(eg - Pangnirtung experience)*

*after the public sector (ie gov)*

In the Yukon and the NWT combined, the tourism industry generated (1987) \$45 million in revenues and accounted for 2.5% of the GTP excluding receipts from resident travellers for which statistics are not available. It produced \$36 million in taxes for all levels of government, of which \$23 million accrued to the federal government. It is estimated that over 15% of the labour force in the Territories is directly or indirectly employed by the tourism sector. The growth in the importance of this economic sector is a reflection of the growth the tourism sector experienced in Canada as a whole. *ask kept to vary*

**TOURISM PRODUCTS AND SERVICES**

Tourism Canada studies of pleasure travellers in Canada's major and secondary markets show that international visitors seek "travel experiences". This information has been used to identify a number of product lines - city, touring, outdoor sport/adventure and rural resort. Of particular application to the Territories are touring and outdoor sport/adventure. Tourism services include accommodation, foodservice and transportation. *- growth in non consuming tourism*  
*(Specialized outfitting & lodge services)*

**Yukon Service Infrastructure**

All except one community in the Yukon is accessible by road. With eleven themed highways including the well-known Alaska and Dempster highways, the territory is well-served reflecting the importance of the "rubber tire" market.

Daily scheduled jet air service is available by Canadian International from the major gateway city of Vancouver to Whitehorse and combined with three scheduled regional and eight charter services provide air transportation to most Yukon communities. Delta Charters has just recently instituted direct flights between Whitehorse and Yellowknife. An expressed

concern, however, is the lack of jet service from Alaska which represents a significant impediment to growth from that market and the need for a jet accessible airport in Dawson City.

With about 80 establishments (excluding lodges) offering about 2,100 rooms, virtually every community is able to offer some form of fixed-roof accommodation from bed and breakfasts, roadside motels to full-service chain hotels. However, while 50% offer 12 rooms or less and only two establishments provide more than 75 rooms (and only one of these is more than 100), this has proven a problem in terms of accommodating existing tour groups and in impeding growth.

There are in addition to the above, 57 hunting/fishing/naturalist lodges as well as approximately 70 RV parks/campgrounds.

Occupancy rates fluctuate seasonally and during the peak season (100 days from June to September) many operate at or near capacity.

*Look at what we're missing!*

In the Yukon there are about 100 locally-owned and operated restaurants as well as fast food outlets which include such chains as Dairy Queen, Kentucky Fried Chicken and MacDonalds. Eighty percent operate year round. Furthermore fixed-roof accommodation usually offer foodservices and account for most of the public lounges and taverns.

#### Northwest Territories Services Infrastructure

The NWT has four highways in the southwest and northwest providing access from B.C., Alberta and the Yukon. Out of 64 communities only 15 are accessible by road. Of concern is the poor condition of these roads particularly the highways to Yellowknife and the resulting impact on touring markets. One major access highway from the south. Road access to such areas as Baffin, Keewatin and the Arctic Coast is not a reality now or in the future.

*Something missing here??*

*Is the minister ready to concede this??*

For the NWT, air transport is all important and is the best developed sector of its tourism service infrastructure, with scheduled service including Air Canada and CAIL from the southern gateways of Edmonton, Winnipeg, Ottawa and Montreal and with 10 communities throughout the NWT capable of handling 727 or 737 aircraft. In addition there are over 25 charter and 12 regional carriers. *which are capable of handling tourist flows.*

The NWT is large, occupying 3.3 million square kilometres and thus it is the cost not so much as the

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availability of transportation service that is a major constraint. There is, however, increasing competition in the NWT leading to reduced fares. Seat sales are now available, frequency of service is on the increase and new cross-the-north flights are making it easier to travel between the eastern and western Arctic.

*yes - but if NWT & Yukon is positioning itself for the same up-scale market this really is a constraint*

One constraint to growth in visitation is not so much the availability of air transport or road access but rather the ability of receiving communities to absorb large influxes of visitors in any given point of time. Tourists must compete with construction workers and air crews for the limited number of beds in most locations. Not only is the number a problem, but the quality of accommodation is inconsistent and in need of improvement.

*is this a constraint - assumes community want more tourists or tourists at all - a big constraint*

Given its size and accessibility by air, the NWT has only about ten more fixed-roof establishments than the Yukon yet offers just over 1,500 rooms as compared to 2,100 for the Yukon. While the NWT has two hotels with over 100 rooms, over 52% have less than 12. The average number of rooms per establishment is 18 as compared to 43 for the Yukon.

*this section could be expanded based on information*

In addition, there are 57 lodges and about 30 RV parks/campgrounds. Occupancy rates like the Yukon fluctuate seasonally and during the same peak period operate at or near capacity.

*the Dept has - is this*

There is less detail available on the foodservices sector in the NWT than in the Yukon but virtually all of the territory's towns and communities offer meal service. This varies from gourmet dining in larger centres to country food or wild meats locally prepared and traditionally served in smaller or more remote communities. In many remote communities of the NWT, it is usually necessary to make prior arrangements for food service.

*necessary to adequately set the policy-making stage? Ask H.V.*

**TOURISM PRODUCTS**

**Touring Product**

Within the context of both territories, touring can be defined as a trip by private vehicle and bus (these are often referred to as "rubber tire") or, to a lesser degree, aircraft (flight seeing) through over-land or over-water routes.

The NWT is large, occupying 3.3 million square kilometres and thus it is the cost not so much as the

### **Yukon Touring**

The Yukon is endowed with natural/scenic resources and many cultural themes (native, explorers, Klondike Gold Rush) providing a world-class touring product. The product is well developed and there are over 100 package tours designed for motorcoaches alone. In fact, the touring product accounts for 85% of all pleasure travel expenditures for the Yukon.

The key characteristics/attributes of the Yukon's touring product can be summarized as follows:

- With an extensive themed highway system which includes the Alaska, Klondike, and Dempster, the Yukon has a well established rubber tire touring product. However, the majority of the market for this product view Alaska or the Western Arctic as their primary destination. As a result, the Yukon experiences significant drive-through traffic.
- Significant car and tour bus traffic originates from Alaska via cruise ship traffic from Skagway or Haines (land excursion) or by scheduled ferry service from Skagway and Haines via the Alaska Marine Highway System.
- There is a need for major built attractions, and new/improved expanded service infrastructure in order to attract the international touring market and induce longer stays.
- Hospitality/tourism management skills are needed at all levels of the industry.
- Small museums of natural history and heritage, galleries and displays of authentic Northern and Indian arts and crafts are found in most communities. The Yukon Native Products with its computerized parka production line and mail order system serves markets from all over North America and overseas and offers tours of its facilities.
- There are national historic parks and sites in the Yukon, in particular those emphasizing the Klondike Gold Rush. Dawson City is the only major, built tourist attraction in the two territories but growth is limited by the need for a new airport facility which would operate year-round, day or night and with jet capability.
- Kluane National Park in the Yukon with its world Heritage designation is the only National Park in the Territories whose entrance is accessible by road. About 80,000



visitors/year stop at the Interpretation Centre in Haines Junction.

- There appears to be potential in completing the restoration of the narrow gauge White Pass and Yukon Railway from Skagway, Alaska to Whitehorse. Service from Skagway to the B.C. border has recently and successfully been reinstated by the Railway's owners after being out of service for a couple of years.
- There are major anniversary events which may have international appeal, such as: the Centennial of the Klondike Gold Rush in 1998 and the 50th Anniversary of the Alaska Highway in 1992.
- Innovative packaging is also needed to attract new markets and to maintain or expand existing markets.

#### NWT Touring Product

In the NWT, the rubber tire touring product is less developed and limited in the southwest to MacKenzie (Alberta gateway), Liard Highways (B.C. gateway) and in the northwest to the Dempster (Yukon gateway) Highway. Yet, despite this, touring accounts for approximately 55% of all pleasure travel to the territory with 75% of this being rubber tire traffic associated with independent private vehicle/RV touring. The following are other characteristics/attributes:

- Packaged touring is mainly to the NWT's non-road accessible regions such as the Keewatin, Baffin Island and the Arctic Coast. This is viewed as a product sub-group with good growth potential for the NWT. These are actually targetted to a higher-yield, high growth market segment interested in specialty type products such as cultural/historical/art tours. *low volume, small group size*
- The Annual Folk-on-the-Rock Festival in Yellowknife is featured in the American Bus Association's "100 Best Events of 1989".
- Inuit arts and crafts are big business and attract millions of export dollars in international markets. Most communities also have small museum and arts and crafts shops.
- There is a need to differentiate between the Eastern and Western Arctic in promotion to ensure tourist expectations can be properly met.

- *importance of cultural tourism as emerging product in Arctic communities*

*Carefully planned consistent with community aspirations*

- Expanded/improved accommodation facilities are needed.
- Highway upgrading is seen as critical in western NWT.
- There is a need for <sup>and a</sup> more coordinated approach to training of hospitality/tourism management skills. This is particularly acute in the NWT where tourism concepts have only been introduced in many communities within this decade.

### Outdoor Sport/Adventure Product

"Outdoors sports" include hunting and sports fishing whereas non-consumptive outdoor activities such as mountaineering, canoeing, kayaking, rafting, dog sledding, nature observation and photo safaris are referred to as "adventure".

Both Territories with their vast pristine wilderness containing lakes, rivers, oceans, mountains, glaciers, forests and tundra possess the natural resources necessary to attract an international clientele seeking experiences in the outdoors. Many of the characteristics are the same for both territories and are as follows:

- Between them, the Territories contain six of the largest "true" wilderness national parks in the Canadian parks system with four more earmarked for future incorporation including a national marine park in the NWT. Further, the territorial governments also maintain their own systems of parks, historic sites and wildlife sanctuaries.
- Hunting is available throughout the Territories offering high quality big game hunts such as caribou, Dall sheep, grizzly and black bears. In the Yukon there are 22 registered hunting outfitters which operate big game hunts and in the NWT, there are 26. In the NWT, polar bear hunting is also offered as an exotic adventure appealing to small, very high margin clients. *Slows down - ask David Grindlay.*
- Strict hunting regulations exist in each territory to ensure that wildlife populations continue to flourish.
- Fishing (trophy and wilderness fly-in) is available throughout the two territories and is strictly regulated. There are 28 companies in Yukon offering specialized fishing lodges, fly-in camps and guided fishing and in the NWT 35. However, there is a need for upgraded facilities.

*Reference to  
New Eden-Herby  
D.H.S.?*

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- most lodges & fishermen are accepting such programs recognizing the need to conserve the resource*
- The Yukon views the fishing capacity as limited and, *for pushing it* in the NWT, it is expected that within the next few years catch-and-release will become mandatory. Growth potential *yes* seems limited and both the NWT and Yukon have seen a slight *due to market* decrease in companies and lodges offering fishing exclusively.
  - In both hunting and fishing, more and more operators are now including non-consumptive adventure activities *changes - sm new recruits* such as naturalist trips, photo safaris, and canoe expeditions as part of their product offering in order to diversify their product, attract clients from this high-growth, high-yield market segment and to extend their season. There is a need, however, for more experienced/trained guides in the area of exploration, interpretive services and with the technical expertise required for wilderness tours.
  - Innovative packaging is needed.

**INTERNATIONAL MARKET DEMAND AND OPPORTUNITIES**

*NWT exit surveys*

Research by both the Territories (e.g. Yukon Visitor Exit Survey) and the federal government (U.S.A., European and Pacific Rim Pleasure Travel Studies) have provided some information on the markets for the Territorial tourism products. However, more territorially specific data is needed on sources of international tourists, their characteristics, product/destination preferences and expectations. *(omit some of this being done - AK?)*

Current information sources (territorial and federal), however, suggest that close to 80% of the 195,000 visitors to the Yukon and 50-60% of the 26,000 non-resident visitors to the NWT are Americans. Overseas arrivals represent 3-6% of the total and in the Yukon they are primarily from West Germany and Switzerland, with Italy, France and Japan showing promise.

*new  
USA  
travel  
market*

Overseas visitors to the North are usually high-yield, special interest travellers such as big-game hunters, trophy sportsfishermen, wildlife photographers, aboriginal art enthusiasts, etc. They are attracted by the wilderness, challenges of remote areas and unique cultural experiences and spend large amounts on comprehensive, guided tour packages. These packages include a 5-10 day stay, special clothing, equipment and other amenities and are usually only available from June to August.

With the proximity to and lure of Alaska for Americans, the U.S. will continue to be the best potential market for the

Yukon. Seniors and long-haul American travellers from California, Texas and Florida are growth segments and more of them could be drawn to the Yukon with the introduction of innovative package tours or optional add-on components for the existing cruise tours. In this context, historical tours of the gold rush, festivals, events, aboriginal and other cultural functions along with the northern lights, fly/RV tours, fall colours and photographic expeditions in Kluane National Park could all be packaged to attract new markets, and to extend the length of stay as well as the season.

*while en route to Alaska - double appeal for American*

*with is this true?*

In terms of the NWT, the potential of American visitation is unknown. The outdoor adventure segment will need to be upgraded and diversified to attract new business. New winter festival, dog-sledding, cross-country skiing, native cross-cultural, special photographic, archaeological, midnight sun, northern lights or gourmet cuisine tours could be tested in high growth segments of California, Washington and possibly Texas. Since air access to the NWT is provided through Edmonton, Winnipeg, Ottawa and Montreal, NWT products could also be packaged with these cities to provide unique experiences for selected U.S. target audiences.

*Why these and not elsewhere?*

*Eastern US*

*APPRECIATE midwest*

West Germany with its propensity for outdoor products will likely be the largest share of overseas visitors over the medium-term to the Yukon and NWT. Growth from this market has not been significant in recent years and outdoor products will have to be upgraded and diversified with possibly an urban experience or expanded into a "safari-type" experience to lure greater numbers of West Germans. Other primary overseas markets will likely remain at the same level although some modest gains could be captured in Japan by promoting the different cultural elements of the North. Initial success has been experienced in Japan with the NWT's packaged trips to view the northern lights and participate in northern activities. Pacific Rim countries such as Australia and New Zealand could represent opportunities for growth as well.

### THE FEDERAL ROLES AND ACTIVITIES

The mission of Tourism Canada, as a branch of Industry, Science and Technology Canada (ISTC) is to ensure the growth, excellence and competitiveness of the Canadian tourism industry. This will be achieved through a combination of the following three roles:

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Leadership to identify and address those issues which affect the health of the industry generally, and to help open new export markets.

Partnership to maximize the utilization of resources and benefits derived from expenditures, and to co-ordinate activities of the private sector and other levels of government.

Support to provide the industry with research, information and business services.

Tourism Canada will undertake the following three activities in keeping with the above-stated roles:

Advocacy to increase recognition of tourism as a vital sector in the Canadian economy and strengthen the position of the industry within the federal government agenda. *by doing what Spain - market develop*

Business Services to contribute to the strategic planning and decision-making of both the private sector and government through research, information and other services.

International Marketing to increase Canada's international competitiveness and develop new market opportunities in high-yield markets. *Alaska*

**NATIONAL TOURISM PRIORITIES**

The following are the national tourism action priorities which have been identified by Tourism Canada:

- Advocacy
1. to influence federal government policies and programs which affect tourism development, with an emphasis on:  
*Curriculum? Skill development*  
Human resource issues;  
Issues of investment, financing and taxation, customs and border crossings, and the regulatory environment which affects them;  
Transportation issues, particularly the Alaska Highway and the need to match market development initiatives with air access; and  
Issues relating to tourism and the environment.

*Very general -  
What will the Dept  
do in any of these  
areas.*

**Business  
Services**

- Overlaps territorial respons.  
— better done at regional level*
2. to work with the industry to develop self-sustaining industry associations which will be credible lobby groups for their own interests.

- greater - but is the intelligence data refined enough to help us in development of specific market seg.*
1. to provide up-to-date commercial intelligence including information on market trends and demands, competitor data and industry performance analysis and background on best business practices;

2. to ensure the continued development of appropriate tourism products geared to high-growth, high-yield markets, with a particular emphasis upon:

*→ how? more \$ to Cdn Parks - more Parks.*

Maximizing the tourism potential of federally-owned property and facilities including National and Historic Parks and National Museums by stimulating the development of tourism infrastructure and services in surrounding areas;

Developing key cultural/heritage attractions and major events in our cities and major touring corridors; *(yellowknife)*  
*Dempster highway?*

Developing new package tour products for the off-season.

3. to stimulate the development and use of technology by the Canadian industry by providing information on its impacts on the industry and its potential applications.

**International  
Marketing**

- Can this be refined enough to assist the NWT??*
1. to generate awareness of Canada as a tourism destination in selected international markets.
  2. to influence the international marketing efforts of key Canadian tourism industry partners.

The focus over the next 3-5 year period will be on the following:

**Targeting high-yield, high-growth market segments;**

*— non-consumptive tourism for the NWT*

*limited winter applications for the NWT*

Promoting Canada's off-season, high-yield products;

Increasing the marketing emphasis on upscale (high-yield) consumers, seniors, off-season, weekend and long-haul travellers;

Promoting under-utilized products; */ natural/cultural product pollution high in NWT*

Matching new market initiatives to the development of innovative product such as *needs* getaway vacation travel, urban/rural combination, Outdoor adventure travel and native cultural experiences.

*NWT application*

**FEDERAL PRIORITIES FOR THE TERRITORIES**

The governments of both territories have developed strategic tourism priorities for their respective jurisdictions. A review of the Yukon's "Tourism Action Plan" and discussions with officials of the NWT who are now finalizing their updated strategy reveal a great deal of congruity with the federal priorities. The following are the federal priorities for the Territories:

*Have we not been consulted (Blackford lake?) Haven't you?*

*what does this translate to?*

**Advocacy**

- advocate the interests of the tourism industry with CEIC, Canadian Parks Service, Revenue Canada, Canada Customs, Transport Canada, Environment Canada, Indian and Northern Affairs Canada and ISTC on such issues as training in tourism, tourism and the national parks, General Sales Tax, customs and border crossings, airport development and aboriginal economic, technology and small business programming.

*Tourism Research Council (part of Congressional Board) predicts that GST will have major impact on tourism*

- work with TIA Yukon/NWT to address issues related to industry-driven human resource development, product and market development for the international marketplace, and infrastructure improvements especially in the areas of highway, accommodation and foodservices.

*through G/NWT*

*??*

*in what way - funding?*

**Business  
Services**

- engage in joint research projects into growth, high-yield U.S., Pacific Rim and select European markets such as Italy and France. *Germany?*
- provide information on the application of technology which would enhance tourism in the winter and help extend the season. *spring*  
*?? too dark too cold?*
- stimulate the development of innovative products and packages which build on the heritage, culture, and natural diversity of the two territories, to attract high-yield, high-growth international adventure, off-season, seniors and long-haul segments identified by research.
- Encourage the development and improvement of travel generators, recreational and service infrastructure on or near the Alaska Highway in view of its 50th Anniversary in 1992 and the MacKenzie Highway/Hwy 3 into Yellowknife. *now*
- encourage the development and improvement of destination areas such as Dawson City, Yellowknife and Whitehorse Waterfront. *off season perhaps... is more needed in the summer*
- stimulating and encouraging the development of tourism facilities and services in the surrounding areas of Kluane and Nahanni National Parks. *Fort Simpson*
- brokering joint venturing projects between aboriginal and non-aboriginal businesses and wholesalers. *to raise this as a specific*  
*- does the minister... at*

**International  
Marketing**

- promote innovative new package tours and products to the high-growth, high-yield segments of the U.S.A., Pacific Rim and Europe as identified by research.
- promote high-yield, off-season products and packages such as spring skiing in Baffin and winter northern lights packages in Yellowknife.



**CONCLUSION**

Federal funds for the territories' tourism industry are urgently needed to continue to take advantage of increased international market interest in the North, to respond to growth in high-yield international market segments and to avoid any losses in export market share. With an injection of funds, innovative package tourism can be introduced to fulfil consumer needs, sales can be generated in the off-season and growth market segments can be developed. In addition, a major effort could finally be initiated to position the North in the rapidly expanding Pacific Rim region so that Canadian suppliers will be at the leading edge of market development in this region.



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