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YUKON TOURISM 1981

INDUSTRY HIGHLIGHTS

APRIL 1982

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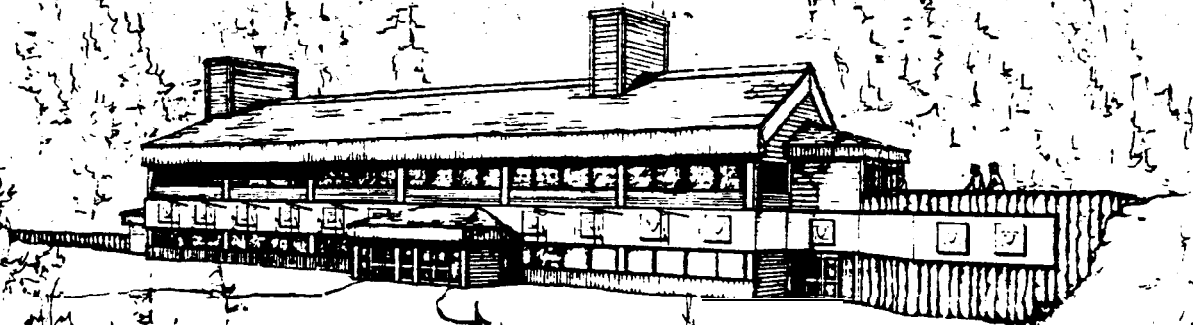
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Department of Tourism and
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*orse Cross Country Ski Chalet
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YUKON TOURISM 1981
INDUSTRY HIGHLIGHTS

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YUKON TOURISM 1981
INDUSTRY HIGHLIGHTS

FOREWORD

This is the eleventh annual edition of the Industry Highlights report. Over the years, it has grown in size, scope and complexity, and so has the industry which it attempts to highlight. Throughout this report, changes within the industry and the clientele to which it caters have been documented, to **form** an extensive set of data for use by entrepreneurs, analysts and members of the general public alike.

Each year new types of information are introduced into **this** report. This year is no exception. In recognition of the Yukon tourism industry's growing importance as an employer, as a generator of revenue, and as a contributor to the Territory's overall quality of life, this edition has attempted to define and describe the industry more fully, and to provide a clearer insight into the tourists traveling into and within Yukon. The objective has been to help you, the reader, become just that much more aware of the workings of Yukon's second largest industry.

This report would not be possible without the assistance and guidance of many business firms and individuals **who** share in the tourism industry. Many assist indirectly, by participating in other projects, be they surveys, promotions or advisory groups, since information is drawn from many sources. Others contribute directly, providing statistics and offering suggestions on improvements. Within the Department of Tourism and Economic Development itself, a number of people have shared their time, enthusiasm, experience and sources of information to assemble this package.

Thanks !

JOHN B. O'NEILL
Tourism Planning &
Development Branch

YUKON TOURISM 1981

INDUSTRY HIGHLIGHTS

SYNOPSIS

1981 by all accounts was an excellent year for the Yukon tourism industry, reversing the decline recorded in 1980 and meeting or exceeding the highest levels attained by most indicators in previous years.

The following synopsis provides a capsule view of the industry in 1981.

The tourism industry consists of over 500 businesses and enterprises located in Yukon.

Over 386 thousand person trips across Yukon's borders into Yukon were made in 1981 by persons considered as tourists, a 14 percent increase over 1980. Seventy-one percent entered by highways, 24 percent by air, and the other 5 percent by other modes, including rail.

Amongst Canadians and U.S. residents entering Yukon from Alaska by highway as part of a trip of one night or more in 1981:

a. Personal vehicle traffic accounted for 75 percent of all highway traffic, up 22 percent over 1980;

U.S. visitors accounted for 78 percent of personal vehicle traffic, up 23 percent over 1980;

Returning Canadians (Yukoners and persons from elsewhere in Canada) accounted for 22 percent of Personal vehicle traffic, up 17 percent over 1980;

b. Motorcoach traffic comprised 25 Percent of highway traffic, up one third over 1980;

- 91 percent of motorcoach passengers were US visitors, an increase in numbers of 27 percent from 1980; and

- 9 percent of motorcoach passengers were returning Canadians, who nearly doubled in numbers (up 94 percent) from 1980.

Air passenger volumes entering Yukon remained relatively unchanged for 1981, while rail Passenger traffic from Alaska rose 6 percent.

Total tourist spending in Yukon in 1981 was at least \$51 million, at least \$47 million of which was by visiting tourists not resident in Yukon.

In 1981, visitor spending during the summer was distributed approximately as follows among different aspects of the Yukon tourist industry:

Accommodation	13%
Food & beverage	25%
Transportation	31%
Recreation & entertainment	13%
Shopping & souvenirs	11%
Other (major Purchases)	<u>7%</u>
	<u>100%</u>

This is a good indicator of just how widely the benefits of tourist spending are spread throughout the Yukon economy.

In 1981, 63 percent of Yukon visitors originated from USA, 28 percent from within Canada, and 9 percent from Overseas and Other Countries. In the past six years, US originating traffic has declined in share of total visitation as visitation from within Canada and from Overseas has grown significantly both in numbers and in share.

California is home to 16 percent of Yukon's US visitors, and ten US states accounted for 58 percent of all US visitors in 1981.

Nearly 90 percent of Yukon's Canadian visitors originate from west of the Ontario-Quebec border, with British Columbia and Alberta jointly accounting for 55 percent of Canadian visitation.

Germany accounts for 43 percent of Yukon's visitors from outside of Canada - USA, and German-speaking Europe (Germany, Austria, Switzerland) provides 58 percent of such visitation. The United Kingdom contributes 7 percent, while Australia-New Zealand provides 15 Percent. In total, 80 percent of visitation from Overseas and Other Countries come from these six countries. Half of the Overseas visitors recorded in Dawson are from Germany.

In the accommodation sector of Yukon's tourism industry there are 79 fixed-roof establishments offering 1906 rooms and cabins. Three quarters of these establishments and rooms are operated year round.

In the Food & Beverage sector, 100 establishments serve prepared meals. 80 of these establishments operate year round, and 57 of the 100 serve alcoholic beverages with meals.

One of the best indicators of **tourism** activity in communities throughout Yukon is changes in the levels of attendance at visitor attractions in each community. With few exceptions, most communities in which such figures are kept recorded increases over 1980, often exceeding visitation levels recorded in any previous year.

Overall, traffic is up from all markets, long term visitation is up, travel by **motorcoach** is rising strongly, and visitation at tourist attractions is also up over previous years, all indicative of a very good year for tourism in Yukon.

INDUSTRY HAPPENINGS

The high traffic levels in 1981 are not the only indicators of optimism and success in the tourism industry, as the following highlights show:

* Yukon continued to benefit under the Canada-Yukon Tourism Agreement (CYTA), the two-year \$6 million federal-territorial agreement for tourism development which started in April 1980. Late in 1981, the two governments **began negotiating** an extension to the agreement, allowing it to continue until March 1984. Yukon's contribution is 15 percent, with the balance coming from the federal Department of Regional Economic Expansion and the federal Department of Indian Affairs & Northern Development. **\$5.7** million is being allocated to development projects throughout Yukon, and the remaining \$300 thousand is being devoted to research and planning projects. The Agreement **has two** basic objectives:

1. Diversify and stabilize the Yukon economy through strengthening and expanding the tourism industry; and
2. Create additional employment and income opportunities in the Yukon tourism industry.

* In March 1981 the Whitehorse Cross Country Ski Chalet was officially opened on the eve of its first major event - the combined World Cup-North American Cross Country Ski Championships. **Over 200** top skiers from 14 countries, including Canada, the United States, Italy, the Scandinavian countries and the Soviet Union participated. The ski chalet was constructed with major financial assistance under the **Canada-Yukon** Tourism Agreement as a long-term Yukon ski facility of world class standards which would have high tourism potential. A survey of tourists in Whitehorse specifically to attend the ski championships learned that over \$130 thousand in visitor expenditure had been contributed to Yukon as a result of the ski event.

- * The Guild Hall Society was awarded a grant of \$40 thousand under the CYTA agreement to assist in completing building improvements. In announcing the grant, Dan Lang, Minister of Tourism and Economic Development noted that "it is the only **theatre** facility operating year-round in Yukon and we see it as a base for a series of arts and entertainment productions aimed at the tourism market. It can form part of the necessary base for a variety of tourism-related events throughout Yukon".

- * As part of its program of developing key tourist destination areas throughout Yukon, the Department of Tourism is building prominent and highly attractive Visitor Reception **Centres** in Whitehorse and **Dawson** City to complement its new centre operated jointly with Parks Canada in **Haines** Junction. In Whitehorse, the historic **T.C.** Richards building is being restored at a cost of \$356 thousand, of which \$267 thousand is being contributed under the Canada-Yukon Tourism Agreement. An old **Dawson** landmark which burned down years ago - the NC Company Store - is being recreated under CYTA at a cost of \$770 thousand to form the new **Dawson** centre. During 1982 it is likely that two additional centres will be started in other communities. Each centre will have the responsibility of attracting visitors to the local region, entertaining them, and encouraging them to take advantage of the events, attractions and other facilities and services offered by the local tourism industry. A second role **will** be that of informing visitors about the opportunities offered by other regions as well.

- * **TWO** major accommodation establishments are now being developed in **Dawson** with CYTA assistance to overcome the recent shortage of rooms. \$129 thousand is being provided as a grant to Triple "J" Cabins towards the addition of 21 motel units and a dining room to the facility. **Dawson's** old Downtown Hotel which was destroyed by fire in 1980 is being rebuilt into a major hotel offering 35 rooms, a 100-seat lounge and a 50-seat restaurant. Total costs amount to \$1.5 million, \$330 thousand of which is a grant from CYTA. The **CYTA** funding for these two projects has come under a pilot accommodation incentives program which applied specifically to **Dawson**.

- * Late in 1981, the City of Whitehorse and the Yukon government entered into a \$170 thousand agreement called the **Whitehorse** Main Street Development Program. Main Street between First and Fourth Avenue is the target for this upgrading program which is expected to provide the catalyst necessary for implementing a long term development plan for the city. Pedestrians will notice significant improvements **in** 1982, as landscaping, street furniture and pedestrian corner bays appear. A building facade program **will** assist local building owners to design and build new and restored facades for their Main Street buildings. With the assistance of this program, the City expects the downtown area to become a better place in which to work, live and visit.

- * In Beaver Creek, the Alas/Ken Border Lodge has mushroomed, with the addition of some fifty new rooms, bringing the well known Westours hotel up to 179 rooms, the second largest accommodation establishment in the Territory. In Whitehorse, the Travelodge underwent a change of identity, becoming known as the Sheffield, Whitehorse. It also mushroomed, adding a third floor and a new wing, raising its capacity from 117 rooms to nearly 200 rooms and placing it firmly on top as the Territory's largest hotel. Together, these two establishments will account for nearly one-fifth of the total number of rooms offered in the Territory during peak season.

- * 1981 was Yukon's first full year as a participant in the Alaska/Yukon Joint Marketing Program. Results to date indicate that nearly 110 thousand tourists visited Yukon in 1981 as a result, leaving nearly \$25 million in direct visitor expenditures. These figures far exceed the measurable benefits of previous years' advertising programs, and confirm the belief that marketing Alaska and Yukon through the "Worlds of Alaska and Canada's Yukon" magazine-style brochure pays off.

- * The **Klondike** Visitors Association, based in historic **Dawson** City, is seriously looking at expanding its Diamond Tooth **Gertie's** Gambling Hall operation. During 1981 various marketing and feasibility studies were initiated with financial assistance under the CYTA . Much of the **KVA's** gambling revenue is invested in **Dawson** through assistance grants to various organizations, sponsorship of major events such as the International Midnight Dome Race and Discovery Days, and operation of free tourist attractions including the Robert Service Cabin.

- * In November 1981, government and industry tourism marketing efforts were joined through the Yukon Cooperative Tourism Marketing Committee. Responsible to both the Board of Directors of Yukon Visitors Association and the Minister of Tourism and Economic Development, the Committee was established to administer 'a joint marketing program, and to recommend research necessary to support and evaluate the program. Marketing Planning is done for both the long term - 5 years - and on an annual basis. The marketing mix used by the committee to market Yukon to the potential tourist includes the Alaska/Yukon joint marketing program, participation in consumer travel shows throughout North **America**, running travel agent promotions, market places and familiarization tours, and **co-ordinating** all publicity distributed through the North American and Overseas media. Membership in the Committee consists of a sampling of representatives of each sector in the industry, including government.

- * The Yukon Visitors Association experienced a very successful year in 1981 with emphasis being placed on long term development and planning for the future of the Association and Yukon Tourism in general. In 1981 Yukon joined with Alaska in a co-operative marketing agreement and as a result, obtained a seat on the Alaska Visitors Association Marketing Council. In addition to its North American programs, often with Alaska, Yukon Visitors Association sent representatives to ITB (Berlin), World Travel Mart (London, England), Australia for the **CGOT "corroboree"** and to Rendezvous Canada. Conventions received attention in 1981, and Yukon Visitors Association has

taken steps to put a full convention branch into place as a department of the Association. The Internal Policy Committee of the Association recognized the importance of this function and has recommended a full time Convention **Co-ordinator** be employed to handle all inquiries and liaison. Arrangements were also made to move the Yukon Visitors Association offices to the **T.C.** Richards Building to prepare for the expansion of staff. In staffing for 1981, the Yukon Government lent an employee to the Yukon Visitors Association to serve as Director, Industry **Relations**. In all, 1981 was a year of many successes **and long** range planning. It bears well for the future of the Yukon Visitors Association in Yukon.

METHODOLOGY & SOURCES

The data presented in this statistical report are taken from various primary and secondary sources, as well as from research conducted within the Department of Tourism & Economic Development.

Border crossing counts are extracted from Statistics Canada International Travel Reports, covering all modes of international traffic from Alaska, and entering Yukon at Beaver Creek, Dawson City, Pleasant Camp on the **Haines** Road and Whitehorse.

Since Watson Lake on the Alaska Highway is not an international boundary, the number of persons who enter Yukon at this point are calculated on the basis of a 1972 traffic count conducted by the Department of Tourism.

Scheduled domestic commercial air carriers provided monthly counts of passengers transported into Yukon. To these counts were added international air traffic figures from Statistics Canada.

Border crossing figures for 1978 and more recent years are obtained from Statistics Canada International Travel figures. Prior to 1978, border crossing figures were derived from Canada Custom records. By using two sources to calculate border crossings, some minor inconsistencies and over-estimations have occurred in previously published material, and the percentage differences range from -2% to 4.5%.

Although this method of compilation and information gathering provides a relatively comprehensive picture of Yukon border crossings, at least three groups are unrepresented:

- auto travelers on the Alaska Highway entering Yukon at Watson Lake at a time other than the peak May-September season;
- domestic air charter passengers flying on airlines other than scheduled carriers;
- and domestic private aircraft **travellers**¹

For years before 1975, Gross Expenditure figures, as presented in Exhibit 10 are estimates based on projections from data collected during two visitor surveys in 1962 and 1966. From 1975 to 1977, figures are based on the Tourism Expenditure Model (TEM) Yukon; for 1978 to 1980 TEM

figures have been used as the basis for projections. 1981 Tourist Expenditure estimates are based in part on 1981 visitor expenditure data obtained through the 1981 Coupon Conversion Study sponsored by the Department of Tourism & Economic Development.

Visitor Origin figures throughout the report are based on visitor registrations at the four Departmental Information **Centres** located in Watson Lake, Haines Junction, Beaver Creek and **Dawson** City, as well as the Whitehorse Visitor Information Centre operated by the Chamber of Commerce.

Data on the make-up and characteristics of the accommodation sector of the Tourism Industry are derived from Tourism Yukon's "Travel Agent's Manuals" published annually. The manuals include a comprehensive listing of Yukon accommodation establishments and offer the most complete data source available.

Accommodation Occupancy percentages listed in Exhibit #18 for 1976 through 1980 were compiled from responses to monthly surveys taken of **all** hotel/motels in Yukon. Since not all accommodation establishments responded to this survey, and since some establishments were often fully occupied by crews in the resource development industries, the occupancy rate data is not wholly reliable from a tourism standpoint. For these and other reasons related to the validity and consistency of the data, this material has not been updated for 1981.

¹Private aircraft travelers are the subject of a separate report published by the Department of Tourism & Economic Development in November, 1979.

TOURISM AND TOURISTS

The tourism industry has long been considered in Yukon as being the Territory's third largest employer, after mining and government, and the Territory's second largest private sector industry, after mining, in terms of revenue generated for the Yukon economy. In total, at least 500 private and public sector businesses and enterprises derive significant to major portions of their revenue directly as a result of expenditures made by tourists.

By definition, tourism is the business of catering to the needs and wants of travelers. And a tourist is a person who travels away from his area of residence and employment for purposes other than establishing a permanent residence, setting up a business enterprise, obtaining employment or as part of the person's employment (eg truck drivers).

In practice then, the tourism industry consists of **those** businesses which provide goods, facilities and services which are used by the **traveller**. Traditionally, the tourism industry is divided into six sectors:

Transportation sector;

Accommodation sector;

Food and beverage sector;

Events and attractions sector;

Recreation, entertainment & miscellaneous services sector; and

Distribution channels, the businesses through which tourism products and services are distributed to the consumer, such as retail travel agents, tour wholesalers, and various reservations services.

By definition, a tourist is a person who uses some or all of these facilities and services while traveling. That person's motivation for travel might be recreation, sightseeing, conventions, **business**, scientific, visiting friends and relatives, or any other types of activities other than the exceptions noted earlier relating to a change of long term residence or the establishment of a business enterprise.

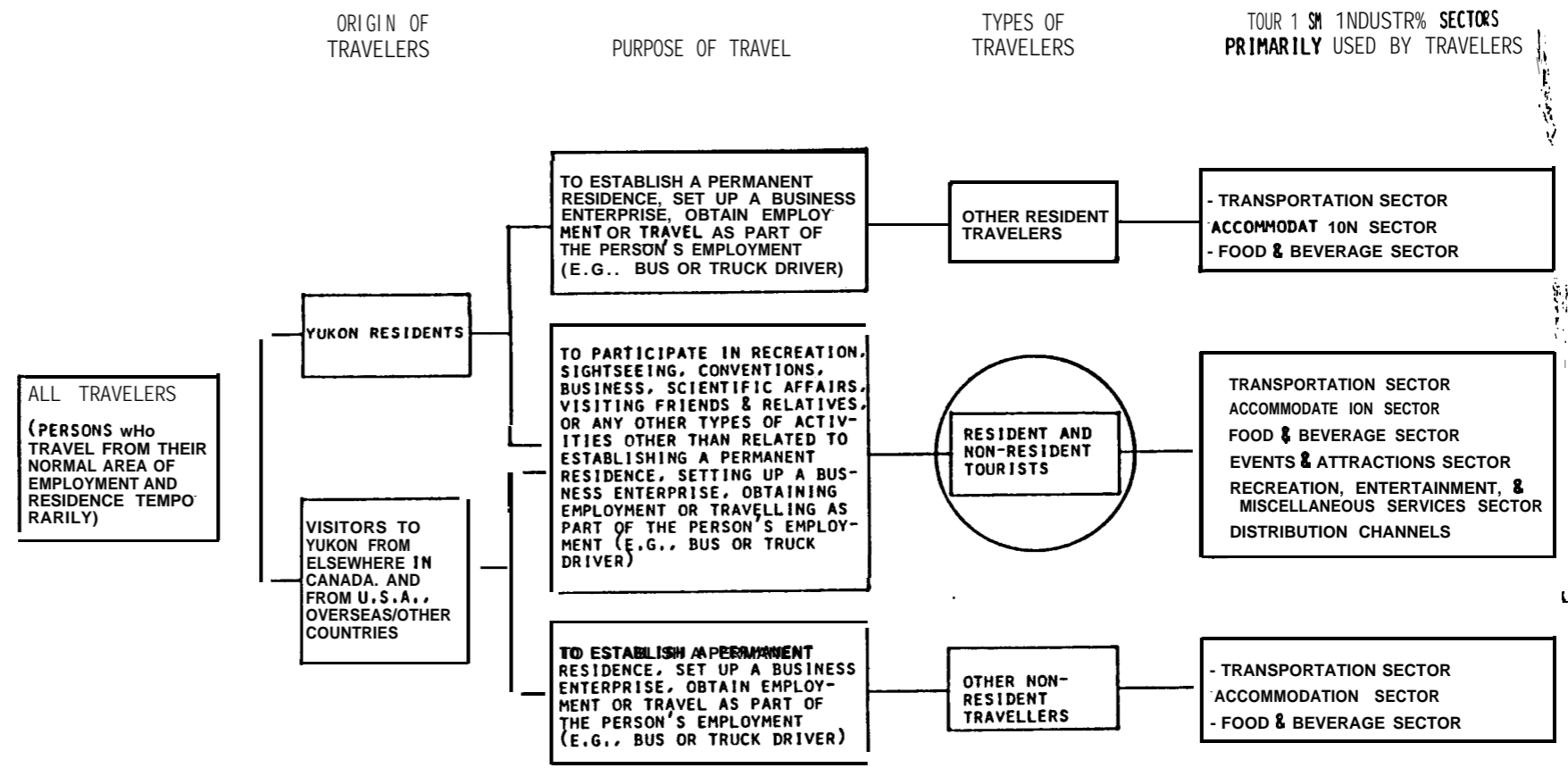
CHART # 1

PROFILE OF YUKON TOURISM INDUSTRY

SAMPLE LISTING OF FACILITIES & SERVICES BENEFITING FROM TOURISM

		<u>Approx. No.</u>
	Air Carriers offering scheduled services:	3
	Air carriers offering charters but not scheduled service:	14
	Railway:	1
TRANSPORTATION SECTOR -	Vehicle rental companies (cars/campers):	7
	Bus companies offering scheduled/charter services:	7
	Auto service stations:	50±
	Miscellaneous:	?
ACCOMMODATION SECTOR -	Fixed roof accommodation establishments (hotels, motels, highway lodges):	79
	Commercially operated campgrounds:	7+
	Government operated campgrounds:	45±
	Miscellaneous:	?
FOOD & BEVERAGE SECTOR -	Cafes, lounges & dining rooms associated with accommodation establishments:	118
	Cafes, restaurants & fast food outlets not associated with accommodation establishments:	28
	Government Liquor Stores/Commercial outlets:	58
	Grocery Stores:	20
	Miscellaneous:	?
EVENTS & ATTRACTIONS SECTOR	Events, including craft fairs, festivals, etc.:	34+
	Commercially operated attractions:	10±
	Government operated attractions/historic sites:	11+
	Government operated visitor information/interpretation centres:	5
	Museums which charge admission:	4+
	Boat tours:	2+
	Yukon artists and producers of handicrafts selling directly and through fairs, stores and co-ops :	248+
	Miscellaneous:	?
RECREATION, ENTERTAINMENT & MISCELLANEOUS SERVICES -	Sporting goods/recreational equipment stores:	15+
	Wilderness tour operators offering wilderness experience vacations, fishing lodge vacations, rentals of canoes, etc.:	28+
	Big game outfitters:	20
	Live theatres, movie cinemas, games centres, bowling alleys, arenas, etc.:	?
	Camera/film retailers, laundromats, drug stores, etc.:	?
	Miscellaneous:	?
DISTRIBUTION CHANNELS -	Travel agencies:	6
	General tour operators/ground operators:	2+
	Visitor associations:	2+
	Miscellaneous:	?

SCHEMATIC DESCRIPTION OF
WHO IS A TOURIST IN YUKON



I

It is readily apparent that the vast majority of travelers in Yukon are tourists. Two main categories of tourists travel in Yukon, Yukon residents, and visitors to the Territory. Both categories are important to the tourism industry. Visitors traditionally arrive during a relatively short season, which last about 110-120 days in Yukon's major destination areas, while residents are more likely to **travel** during a longer season, with some taking advantage of spring and fall opportunities for skiing, hunting and other outdoor related activities. In terms of revenue generation, businesses derive most of their tourism income during the **summer**, but are often sustained over a longer season or throughout the balance of the year by smaller numbers of non-resident visitors plus Yukoners traveling during the less busy seasons.

MEASURING TOURISM ACTIVITY

Statistical measurement of all of this activity is done on an ongoing but piecemeal basis due to the high costs of obtaining comprehensive data. The number of resident and non-resident tourists traveling in Yukon or visiting any given community is not known precisely, nor is the total impact of the tourism industry on the Yukon economy known with certainty. However, over the past eleven years a series of indicators have been developed to provide current measurements and trend data on the industry.

This report presents current data and trend analyses on a number of these indicators of tourism activity. Data on the number of persons entering Yukon is used to assess changes in the numbers of Canadians and foreign visitors traveling into and within Yukon. At the regional and community level, data is included on the number of persons visiting specific tourist attractions and information centres throughout the Territory, as an indicator of the ups and downs of tourism activity in each area. Also at the regional level, measurements of the size and capacity of the accommodation sector are provided, since the ability of regions to accommodate visitors who are unable to camp or visit friends and relatives is directly related to their supply of fixed roof commercial accommodation. Finally, as an overall measurement of tourism activity in the Territory, estimates have been made of the economic contribution of visitors and traveling Yukoners to the Territorial economy through direct expenditures. These estimates are based on research conducted during the past four years into the characteristics and travel patterns of visitors to Yukon.

YUKON VISITOR VOLUMES

Three hundred eighty-six thousand trips were made across Yukon's various borders by visitors and Yukon residents entering Yukon during 1981. This represents a 14 percent increase over 1980's **total** of 340 thousand, and is the greatest number of entries across Yukon's borders ever recorded in one year. Entries by highway account for 71 percent of these 1981 border crossings by people, underscoring the dominant role that tourists traveling by personal vehicle and **motor-coach** have in Yukon's tourism **industry**. Air travelers were the second most prevalent category of tourists entering Yukon, comprising some 24 percent of total traffic. Chart # 3 portrays these findings graphically, to illustrate the trends in border crossings between 1975 and 1981.

Highway Border Crossings

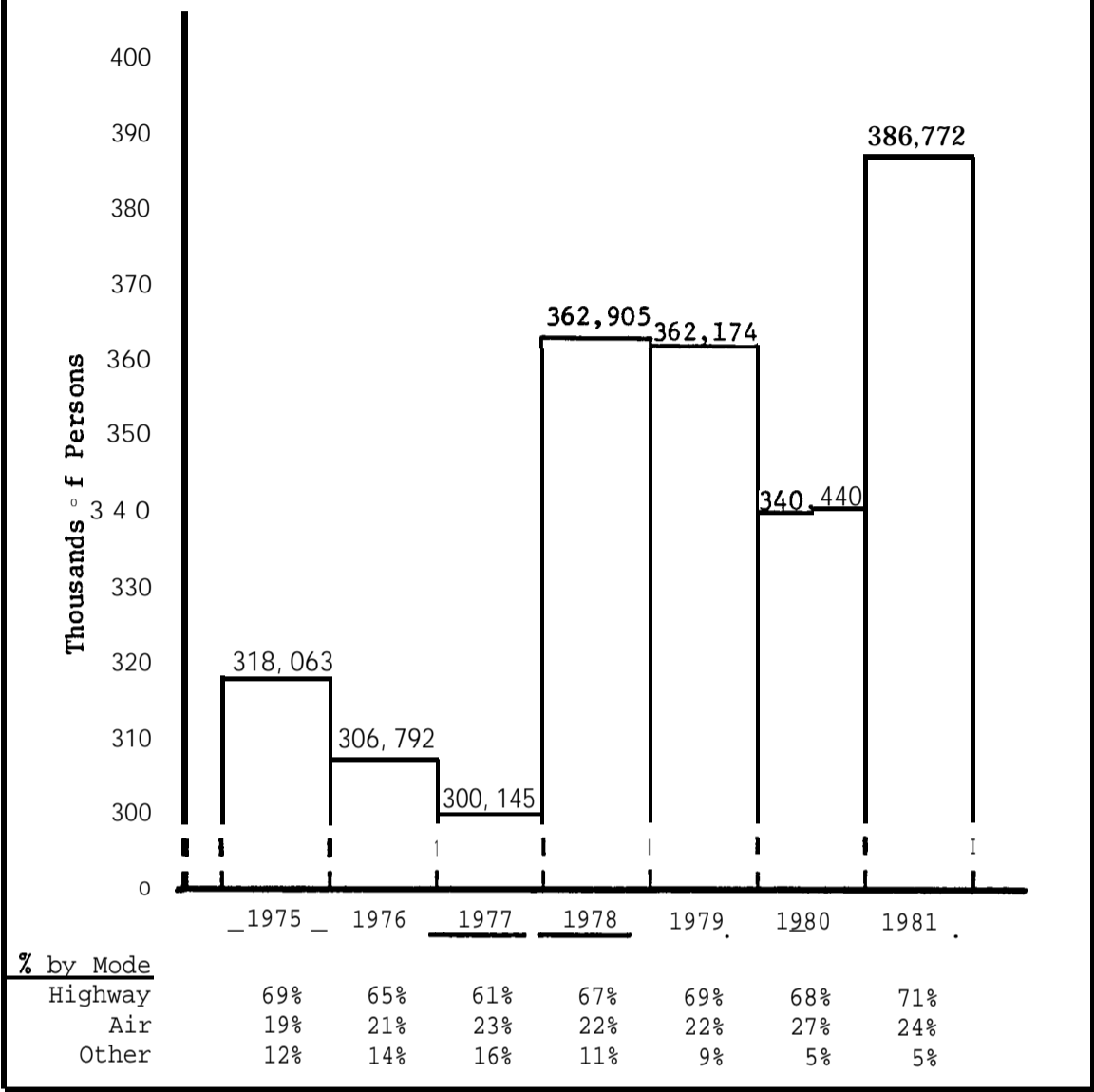
Highway border crossing data provided by Statistics Canada distinguishes between returning Canadian residents and U.S. residents entering Canada from Alaska, and provides additional information on the numbers of such tourists traveling by personal vehicle and **motorcoach**. Beyond this, Statistics Canada also have determined the numbers of these people staying less than one day, and the numbers staying one night or more. Since travelers whose trips involve at least one night away from home most closely fit the description of a tourist, the following conclusions are drawn from Statistics Canada's highway border crossing data for these **longer** stay travelers.

Personal vehicle border crossings by Canadian and U.S. residents entering Yukon as part of a trip lasting one night or more increased 22 percent in 1981 over 1980, and accounted for 75 percent of highway traffic.

Motorcoach border crossings increased as well in 1981, showing a 33 percent increase over 1980, and accounted for 25 percent of highway traffic.

CHART # 3

NUMBER OF VISITORS & RETURNING CANADIANS ENTERING YUKON, **ANNUAL** TOTAL VOLUME & PERCENT DISTRIBUTION BY MODE OF TRANSPORT, 1975 - 1981



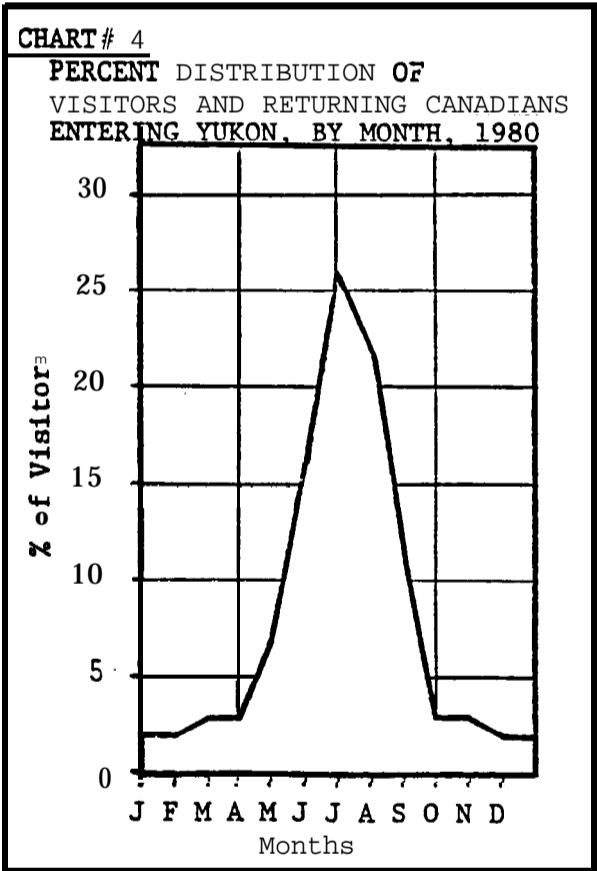
If nationality of these tourists is taken into consideration, U.S. residents accounted for 78 percent of the personal vehicle traffic and 91 percent of the **motorcoach** passengers entering Yukon from Alaska in 1981. Visitation by US residents rose 23 and 27 percent for personal vehicle and motorcoach tourists respectively, while Canadians returning by personal vehicle increased 17 percent over 1980 and those returning by **motorcoach** nearly doubled in numbers over 1980, increasing by 94 percent. Data on usage of highway transportation by visitors from Overseas and Other Countries is not available.

Border Crossings by Other Modes of Transportation

Air traffic, according to figures provided by Statistics Canada and various air carriers, changed very little in overall volume between 1980 and 1981. Rail traffic also changed very little over 1980, with a six percent gain in tourists entering Yukon being recorded, according to Statistics Canada data.

Seasonality of Visitor Traffic Entering Yukon

Most Canadian tourist destination regions are blessed or plagued by dramatically cyclical patterns of tourist visitation each year. This is equally true of Yukon, as Chart # 4 illustrates based on 1980 data. **This** cyclical pattern of very high visitor volumes in summer - the peak season - preceded and followed by comparatively very low visitor volumes between October and April - the low season - is known as **seasonality**. **Seasonality** is a blessing to many tourism business operators who work 18 hour days from May to September, employing the sudden **flood** of students and transient **labour** which materializes during the warmer months. Once the season is over, these operators are able to shut down, and devote the colder months to upgrading their businesses, marketing their products to attract next year's visitors, earning extra income, and enjoying a well deserved rest or vacation. But the plague aspect is a headache. With visitor traffic peaking during the summer months, costly visitor facilities strain to meet the demand, and are then suddenly empty. Local residents on the one hand must compete with visitors to get into areas of common interest, such as fishing spots, restaurants, recreation areas, and favourite stores, and



then, on the other hand, find many of these amenities closed or **out-**of-season once the tourists are gone. This is particularly true in smaller communities, such as **Dawson**, where most hotels, bars, restaurants and stores are seasonal. Tourism **will** continue to be a seasonal industry in the foreseeable future, however, projects such as the Whitehorse Cross Country Ski Chalet, and winter marketing programs by industry and government alike will help to stabilize tourism traffic in key areas, reducing the strain on visitor facilities and providing multi-season employment for Yukoners as it becomes economically viable for more businesses to stay open to cater to this growing **clientel**, be they local residents or visitors from elsewhere.

Analysis of the volumes of travelers entering Yukon by the different modes of transportation throughout 1981 presents some startling differences on a seasonal basis.

CHART # 5

DISTRIBUTION BY QUARTER OF TOURISTS ENTERING YUKON BY EACH MODE OF TRAVEL, REGARDLESS OF DURATION OF TRIP, 1981

Mode of Entry	Q-1 Jan-Mar	Q-2 Apr-Jun	Q-3 Jul-Sep	Q-4 Ott-Dec	1981 Jan-Dee
Personal Vehicle	5%	25%	60%	10%	100%
Motorcoach	0.2%	24%	75%	1%	100%
Highway Total	3%	26%	67%	5%	100%
Air	21%	26%	36%	18%	100%
Rail	0.5%	34%	64%	1%	100%
All Modes Overall	7%	26%	59%	8%	100%

Sources: Data from Statistics Canada, CP Air, PWA. Highway data excludes entries via Watson Lake due to unreliability of data for traffic entering Yukon at this point via South Alaska Highway and Stewart Cassiar Road.

For all modes but air, traffic volumes entering Yukon rise significantly during the second quarter - April through June - and peak sharply in the third quarter, prior to plunging to low levels during the fourth and first quarters. This traffic exhibits strong **seasonality**, with rail and **motorcoach** traffic, which represents 16 percent of overall traffic,

being most variable. In contrast to this, air traffic volumes are least seasonal, with 18 to 21 percent of total air passenger traffic **occurring** during each of the first and last quarters.

Detailed statistics concerning traffic volumes entering Yukon are included immediately following this section, as follows:

EXHIBIT # 1	Number of Canadian & US Residents Entering Yukon from Alaska by Personal Vehicle or Motorcoach , Grouped by Length of Stay in 1981.
EXHIBIT # 2	Yukon Border Crossings 1981
EXHIBIT # 3	Yukon Border Crossings 1980
EXHIBIT # 4	Yukon Border Crossings 1979
EXHIBIT # 5	Yukon Border Crossings 1978
EXHIBIT # 6	Yukon Border Crossings 1977
EXHIBIT # 7	Yukon Border Crossings 1976
EXHIBIT # 8	Yukon Border Crossings 1975

Exhibits #2-8 present detailed data on the number of persons entering Yukon across a border. This data is presented by mode of travel and border crossing point on a month by month basis from January 1975 to December 1981. Figures for Watson Lake are estimates. Figures for bus traffic in 1981 and 1980 include all traffic from Overseas & Other Countries entering Yukon by land.

EXHIBIT # 9	% Changes Auto and Bus Border Crossings Into Yukon, 1980 to 1981
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Number of Canadian and U.S. Residents Entering Yukon from Alaska by Personal Vehicle or **Motorcoach**, Grouped by Length of Stay in 1981

TYPE OF TRAFFIC ENTERING YUKON FROM ALASKA, BY BORDER CROSSING POINT	NUMBER OF PERSONS ENTERING YUKON FROM ALASKA									
	BY PERSONAL VEHICLE					BY MOTORCOACH				
	Canadian Residents	% of Total	us Residents	% of Total	Total Cdn & US Residents	Canadian Residents	% of Total	us Residents	% of Total	Total Cdn & US Residents
RETURNING SAME DAY ¹										
Beaver Creek	1,119	40	1,649	60	2,768	19	4	481	96	500
Dawson City ²	1,026	82	224	18	1,250	46	58	34	42	80
Pleasant Camp ³	4,291	22	15,396	78	19,687	58	14	347	86	405
Whitehorse ⁴	11,575	74	3,974	26	15,549	800	25	2,435	75	3,235
All Ports of Entry	18,011	46	21,243	54	39,254	923	22	3,297	78	4,220
STAYING IN YUKON ONE NIGHT OR MORE										
Beaver Creek	6,061	10	51,835	90	57,896	2,627	14	16,740	86	19,367
Dawson City ²	2,188	22	7,529	78	9,717	694	46	797	54	1,491
Pleasant Camp ³	5,525	42	7,548	58	13,073	58	5	1,178	95	1,236
Whitehorse ⁴	6,925	42	9,469	58	16,394	957	1 0	8,850	90	9,807
All Ports of Entry	20,699	21	76,381	79	97,080	4,336	14	27,565	86	31,901
TOTAL ENTERING YUKON, REGARDLESS OF LENGTH OF STAY										
Beaver Creek	7,180	12	53,484	88	60,664	2,646	13	17,221	87	19,867
Dawson City ²	3,214	29	7,753	71	10,967	740	47	831	53	1,571
Pleasant Camp ³	9,816	30	22,944	70	32,760	116	7	1,525	93	1,641
Whitehorse ⁴	18,500	58	13,443	42	31,943	1,757	14	11,285	86	13,042
All Ports of Entry	38,710	28	97,624	72	136,334	5,259	15	30,862	85	36,121

Source: Based on year-end border crossing data compiled by Statistics Canada.

Notes:

¹Cdn traffic returning same day spends less than one day in US; US residents spend less than one day in Canada

²Via 60 Mile Highway

³Via Haines Road

⁴Via Carcross-Skagway Highway

YUKON BORDER CROSSINGS 1981

PERSONS ENTERING YUKON -
MONTH/MODE/PORT OF ENTRY

MONTH	BEAVER CREEK		DAWSON		PLEASANT CAMP		WHITEHORSE		WATSON LAKE		TOTAL HWY.	BEAVER CREEK	DAWSON	WHITE HORSE	WATSON LAKE	TOTAL AIR	HITE ORSE	ALL PORTS	TOTAL OF RAIN & OTHERS	TOTAL ALL MODES
	AUTO	US	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS		AIR	AIR	AIR	AIR		TRAIN	OTHER METHODS		
JANUARY	1,031	60	-	-	958	1	-	-	N/A	N/A	2,050	3	9	5,284	920	6,216	53	6	59	8,325
FEBRUARY	909	17	-	-	900	2	-	-	N/A	N/A	1,828	11	71	5,298	723	6,053	26	4	30	7,911
MARCH	1,700	17	-	-	1,466	1	-	2	N/A	N/A	3,186	16	24	6,184	1,046	7,270	10	8	18	10,474
Q1	3,640	94	-	-	3,324	4	-	7	N/A	N/A	7,064	30	54	16,766	2,689	9,539	89	18	107	26,710
APRIL	1,634	157	-	-	2,058	68	6	5	N/A	N/A	3,928	15	20	5,218	832	6,085	93	25	118	10,131
MAY	3,202	646	407	19	2,651	359	3,951	2,688	8,839	Z	20,064	12	74	6,410	1,295	7,791	406	96	502	28,357
JUNE	7,718	4,263	2,111	643	4,921	296	5,203	3,924	16,788	41	46,286	11	104	8,711	1,484	10,310	5,329	222	5,551	62,147
Q2	12,554	5,066	2,518	662	9,630	723	9,160	4,197	25,327	44	70,278	38	198	20,339	3,611	14,186	5,828	343	6,171	100,635
JULY	14,877	7,160	3,696	978	6,185	576	9,621	5,274	32,617	79	81,743	9	142	9,975	1,515	11,641	4,527	493	5,020	98,404
AUGUST	14,556	7,703	3,807	1,200	6,947	662	8,506	4,511	21,927	63	70,456	36	228	11,652	1,606	13,522	4,616	514	5,130	89,108
SEPTEMBER	7,005	2,687	939	190	2,799	353	3,491	2,042	11,114	18	30,804	25	36	7,327	1,119	8,507	1,715	166	1,881	41,192
Q3	36,438	17,550	8,442	2,368	15,931	1,591	21,618	11,827	65,658	1,58	183, (X)3	A	406	28,954	4,240	53,670	10,858	1,173	12,031	228,704
OCTOBER	3,910	231	7	-	1,691	11	1,156	75	N/A	N/A	7,301	1	45	5,505	958	6,509	135	93	228	14,038
NOVEMBER	2,172	131	-	-	1,146	4	2	7	N/A	N/A	3,462	14	7	4,068	905	4,994	2	1 3	24	8,480
DECEMBER	1,950	128	-	-	818	2	7	1	N/A	N/A	2,906	4	7	4,318	899	5,228	68	3	71	8,205
Q4	8,032	490	7	-	3,875	17	1,165	83	N/A	N/A	13,669	19	59	13,891	2,762	16,731	224	99	323	30,723
TOTAL	60,664	23,200	10,967	3,030	32,760	2,335	31,943	16,109	90,985	2,021	274,014	157	717	79,950	13,302	94,126	16,939	1,633	18,632	386,771

SOURCES : TRANSPORT COMPANIES , ALASKA HIGHWAY TRAFFIC COUNT (1972 ADJUSTED), STATS CANADA

PERSONS ENTERING YUKON -
MONTH/MODE/PORT OF ENTRY
YUKON BORDER CROSSINGS 1980

MONTH	BEAVER CREEK		DAWSON		PLEASANT CAMP		WHITEHORSE		WATSON LAZE		TOTAL TRUCK	BEAVER CREEK AIR	DAWSON AIR	WHITE HORSE AIR	WATSON LAZE AIR	TOTAL AIR	WHITE HORSE TRAIN	OTHER METHODS	TOTAL OF TRAIN & OTHERS	TOTAL ALL MODES
	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS										
JANUARY	945	1	---	---	685	---	2	2	N/A	N/A	1,635	1	4	4,599	986	5,990	58	22	80	7,305
FEBRUARY	830	2	---	---	813	1	---	5	N/A	N/A	1,648	---	---	---	833	5,836	50	17	67	7,524
MARCH	1,630	19	---	---	1,028	1	5	5	N/A	N/A	2,681	2	16	5,755	1,002	6,775	84	29	113	9,572
Q1	3,405	22	---	---	2,526	2	3	12	N/A	N/A	5,970	3	24	15,353	2,821	18,201	192	68	260	24,431
APRIL	1,897	65	---	---	1,963	61	269	---	N/A	N/A	4,295	17	11	4,971	1,082	6,081	62	5	67	10,403
MAY	3,069	386	303	19	1,570	43	2,162	224	7,763	15	6,354	11	58	5,791	1,153	7,013	663	82	745	24,312
JUNE	6,165	3,241	1,558	1,062	4,365	491	4,035	3,622	15,262	289	40,190	13	203	8,830	1,340	10,388	3,149	162	3,311	53,787
Q2	11,131	3,692	1,861	1,081	8,898	595	6,466	3,946	23,025	304	60,895	41	272	19,992	3,575	75,480	3,874	249	4,123	88,502
JULY	10,630	5,498	3,596	1,154	5,703	783	7,119	4,416	29,652	523	69,071	10	177	10,848	1,592	12,587	4,587	694	5,281	86,942
AUGUST	9,755	4,698	3,271	1,313	5,561	814	7,831	4,257	19,992	439	57,872	34	299	10,998	1,560	12,851	4,561	813	5,374	76,088
SEPTEMBER	5,799	1,712	298	266	2,787	250	2,795	2,742	10,104	127	26,881	14	105	6,492	1,397	8,008	2,524	108	2,632	37,520
Q3	26,184	11,908	7,165	2,733	14,051	1,847	17,745	11,415	59,690	1,089	153,821	58	540	28,338	4,979	33,446	11,672	1,615	13,282	200,560
OCTOBER	3,248	102	---	---	1,827	65	329	128	N/A	N/A	5,699	16	---	4,506	966	5,467	76	29	105	11,291
NOVEMBER	2,152	32	---	---	991	4	2	4	N/A	N/A	3,181	4	26	4,269	1,018	5,317	119	23	138	8,649
DECEMBER	1,587	21	---	---	690	2	3	1	N/A	N/A	2,301	1	---	3,892	777	4,670	38	4	42	7,016
Q4	6,987	155	---	---	3,508	71	334	133	N/A	N/A	11,188	21	26	12,668	2,761	15,477	225	56	285	26,947
TOTAL	47,709	5,775	9,026	3,814	28,983	2,515	24,548	15,406	82,715	1,305	251,881	123	863	75,994	13,666	90,601	15,967	1,988	17,955	340,440

SOURCES: TRANSPORT COMPANIES, ALASKA HIGHWAY TRAFFIC COUNT (1972 ADJUSTED), STATISTICS CANADA

YUKON BORDER CROSSING

MONTH	BEAVER CREEK		DAWSON		PLEASANT CAMP		WHITE HORSE		WATSON LAKE	
	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS
JANUARY	2395	7	-	-	875	-	-	-	-	-
FEBRUARY	1568	108	-	-	586	-	-	-	-	-
MARCH	2734	77	-	-	1139	-	12	-	-	-
Q1	6697	192	-	-	2600	-	12	-	-	-
APRIL	2841	43	-	-	2485	-	19	-	-	-
MAY	4577	451	310	19	2946	-	2661	385	7701	-
JUNE	10094	3094	3512	335	5239	118	4355	2999	15141	2
Q2	17512	3588	3822	354	10670	118	7035	3384	22812	3
JULY	13076	5220	3998	103	4841	232	7100	4642	28117	5
AUGUST	13318	4637	3635	189	4375	459	6995	4915	19776	4
SEPTEMBER	7411	2517	904	170	2505	40	3401	2631	10024	1
Q3	33805	12374	8532	462	11721	731	17496	12188	59217	8
OCTOBER	5234	40	-	-	1647	14	1062	92	-	-
NOVEMBER	1712	40	-	-	830	10	-	-	-	-
DECEMBER	1322	6	-	-	734	-	6	-	-	-
Q4	8318	86	-	-	3211	33	1071	92	-	-
TOTAL	66334	16740	12359	816	28202	802	25614	15664	82051	138

SOURCES: TRANSPORT COMPANIES, ALASKA HIGHWAY TRAFFIC
 *SKAGWAY-CARCROSS ROAD WAS OPEN FROM MAY 7 TO OCTOBER
 & YUKON ROUTE.

PERSONS ENTERING YUKON -
YUKON BORDER CROSSINGS 1978
MONTH/MODE/PORT OF ENTRY

MONTH	BEAVER CREEK		DAWSON		PLEASANT CAMP		WHITE HORSE		WATSON LAKE		TOTAL HWY.	BEAVER CREEK		DAWSON		WHITE HORSE		WATSON LAKE		TOTAL AIR	WHITE HORSE - TRAM	ALL PORTS OTHER METHODS	TOTAL OF TRAM & OTHERS	TOTAL ALL MODES
	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS		AUTO	AIR	AIR	AIR	AIR	AIR	AIR	AIR					
JANUARY	1276	8	-	-	1166	-	-	11	-	-	-	2461	7	23	960	107	-	107	-	960	-	-	107	767
FEBRUARY	1411	11	-	-	1318	-	-	8	-	-	2748	-	14	880	187	3644	880	4538	880	4538	187	3	190	7476
MARCH	2198	53	-	-	1398	-	-	9	-	-	3658	4	60	1070	222	4988	1070	6172	1070	6172	222	20	242	10022
Q.	4885	72	-	-	3882	-	-	28	-	-	8867	11	97	2910	516	12341	2910	15359	2910	15359	516	23	539	24765
APRIL	3360	160	6	-	2257	3	-	19	-	-	5805	28	29	1025	289	4276	1025	5358	1025	5358	289	-	289	11452
MAY	4306	49	429	24	4240	75	-	49	-	9061	18251	1	30	1080	1052	4903	1080	6416	1080	6416	1052	22	1074	25339
JUNE	9362	2011	2308	339	5791	191	-	509	-	17814	39345	24	63	1430	5542	6971	1430	8488	1430	8488	5542	128	5670	53501
Q.	17628	2300	2743	363	12288	269	-	577	-	26875	63399	53	122	3535	6883	16150	3535	19860	3535	19860	6883	150	7033	90212
JULY	14607	3300	5408	457	8473	395	-	974	-	34609	68834	31	189	1247	13028	8812	1247	10279	1247	10279	13028	285	13113	92226
AUGUST	17261	3044	4358	539	6426	434	-	756	-	23266	56598	11	200	1430	12026	11095	1430	12736	1430	12736	12026	222	12248	81582
SEPTEMBER	10019	1464	992	191	3780	170	-	503	90	11794	29152	57	49	1230	6441	5568	1230	6904	1230	6904	6441	159	6600	42656
Q.	41887	7808	10758	1187	18679	999	-	2233	90	69569	154584	99	438	3307	31495	25475	3307	29919	3307	29919	31495	666	31061	216464
OCTOBER	5942	256	-	-	2086	-	-	143	33	-	8460	24	-	920	263	3947	920	4891	920	4891	263	10	273	13624
NOVEMBER	4619	40	-	-	968	-	-	111	-	-	5708	5	40	790	48	1884	790	2719	790	2719	48	-	48	8475
DECEMBER	2327	16	-	-	867	-	-	195	-	-	3405	-	5	868	57	4970	868	5843	868	5843	57	-	57	9285
Q.	12888	282	-	-	3921	-	-	449	33	-	17537	29	45	2578	348	10801	2578	13463	2578	13463	348	10	358	31384
TOTAL	77288	10462	13501	1550	38770	1268	-	3287	123	96544	244423	192	702	12330	39242	64767	12330	78591	12330	78591	39242	849	59831	362906

SOURCES: TRANSPORT COMPANIES, ALASKA HIGHWAY TRAFFIC COUNT (1972 ADJUSTED), STATIST CS CANADA
*VIA WHITE PASS & YUKON RAILROAD

YUKON BORDER CROSSINGS

MONTH	OVER ALL	DAWSON			PLEASANT CAMP		WHITEHORSE		WATSON LAKE	
		BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS
JANUARY	1496	36	-	-	1851	-	5	-	-	-
FEBRUARY	1487	67	-	-	1430	-	d	-	-	-
MARCH	2297	307	15	-	1755	7a	7	-	-	-
Q1	5264	410	15	-	5036	78	18	-	-	-
APRIL	2557	93	-	-	2361	17	11	-	-	-
MAY	3659	506	168	-	3291	93	92	-	7700	109
JUNE	7211	2331	1509	417	3843	153	706	34	12895	378
Q2	13427	2936	1957	417	9495	263	809	34	20595	567
JULY	13359	2040	4517	595	3397	101	619	-	31652	378
AUGUST	9005	2239	3840	364	5689	273	714	40	9455	378
SEPTEMBER	5973	1560	116	36	2604	142	203	-	7031	189
Q3	19217	6129	8473	1001	11710	602	1596	400	48138	945
OCTOBER	4505	60	75	-	1761	77	17	-	-	-
NOVEMBER	2846	25	-	-	783	7	6	-	-	-
DECEMBER	2538	17	-	-	718	-	4	-	-	-
Q4	9889	102	75	-	262	84	21	-	-	-
TOTAL	1191	9587	10520	1410	9563	1027	2450	74	68733	1512

SOURCES: TRANSPORT COMPANIES, ALASKA HIGHWAY TRAFFIC
*VIA WHITE PASS & YUKON RAIL ROAD

YUKON BORDER CROSSINGS

MONTH	BEAVER CREEK		DAWSON		PLEASANT CAMP		WHITEHORSE		WATSON LAKE	
	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS
JANUARY	1554	31	-	-	1152	-	20	-	115	-
FEBRUARY	1547	10	-	-	1761	-	6	-	92	-
MARCH	2236	30	-	-	1712	1	13	-	101	-
Q1	5337	71	-	-	4625	1	39	-	308	-
APRIL	2560	94	2	-	2456	70	13	-	187	-
MAY	4757	566	325	-	3181	176	71	-	5771	202
JUNE	8692	1865	1600	266	4641	323	m	-	15668	404
Q2	16029	2525	1927	266	10278	569	674	-	21626	606
JULY	13844	3142	4273	305	6456	379	1024	-	27310	404
AUGUST	13412	2857	3916	379	5189	298	661	-	15758	404
SEPTEMBER	7957	1515	832	4	2795	7	225	-	5628	202
Q3	35213	7514	9021	688	14440	684	1910	-	48606	808
OCTOBER	4808	W	138	-	2149	5	43	28	355	-
NOVEMBER	3343	2 a	-	-	1429	1	17	-	75	-
DECEMBER	2597	64	-	-	999	-	-	-	78	-
Q4	10748	159	138	-	4577	6	60	28	308	-
TOTAL	67327	10269	11086	1014	33920	1260	2W3	28	70938	1414

SOURCES: TRANSPORT COMPANIES, ALASKA HIGHWAY TRAFFIC COUNT (19

*VIA MILITE PASS & YUKON RAILROAD

YUKON BORDER CROSSING

MONTH	BEAVER CREEK		DAWSON		PLEASANT CAMP		WHITEHORSE		WATSON LAKE	
	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS	AUTO	BUS
JANUARY	1237	19	-	-	1009	-	45	-	111	-
FEBRUARY	1238	34	-	-	1248	-	43	-	86	-
MARCH	1975	709	-	-	1604	116	6	-	114	-
Q1	4450	759	-	-	3861	116	94	-	311	-
APRIL	2493	444	-	-	1982	24	27	-	203	-
MAY	3900	477	398	4	4095	86	79	-	7624	21
JUNE	8278	1587	1350	360	650a	320	465	48	20725	42
Q2	14671	2508	1748	364	12585	430	571	48	20552	63
JULY	12650	3260	3835	680	8166	452	872	-	33224	42
AUGUST	13349	2663	3541	545	6826	373	537	76	19551	42
SEPTEMBER	8085	1142	731	110	3090	131	164	2	5206	21
Q3	14086	7065	8107	1335	18082	956	1573	78	57981	105
OCTOBER	4288	99	31	-	2048	17	36	-	164	-
NOVEMBER	2886	22	-	-	1235	44	18	-	76	-
DECEMBER	3220	35	-	-	866	-	21	-	119	-
Q4	10394	156	31	-	4149	61	75	-	359	-
TOTAL	3601	10488	10188	1732	38677	22412	26	17203	160	

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SOURCES: TRANSPORT COMPANIES ALASKA HIGHWAY TRAFFIC COUNT (VIA WHITE PASS & YUKON RAILROAD)

% Changes Auto and Bus Border Crossings Into Yukon. 1980 to 1981

	Returning Same Day		Staying One Night or More In Yukon		Total Regardless Of Length Of Stay	
	<u>Auto</u>	Bus	<u>Auto</u>	<u>Bus</u>	<u>Auto</u>	<u>Bus</u>
Beaver Creek	60%	346%	26%	59%	27%	38%
Dawson City	63%	-56%	39%	-47%	22%	-47%
Pleasant Camp	52%	-22%	-18%	-17%	13%	-18%
Whitehorse	12%	-47%	<u>54%</u>	31%	30%	- 4%
All Ports of Entry as Listed Above	28%	-53%	22%	33%	24%	10%

This table is derived from Statistics Canada Border Crossing Statistics for calendar years 1980 and 1981. Figures for Watson Lake are not collected by Statistics Canada, since it is not an international border crossing. The Watson Lake figures listed elsewhere in this report are general estimates which are difficult to validate. For these reasons, only Statistics Canada-based data are used here, to preserve accuracy and validity.

HOW MANY TOURISTS ACTUALLY TRAVELLED IN YUKON IN 1981?

The actual number is not known, since detailed research into travel by residents and non-residents **alike** in Yukon has never been fully undertaken, **though** extensive research into specific types of non-resident tourists has been done.

The Estimate

What is believed to be a **close** estimate of the total number of tourists has been made for 1981 at the Territorial level. It is much harder to estimate visitation at the regional or community level, though attempts have been made for areas such as Dawson City. These are not reported here.

The border crossing data developed from statistics provided by Statistics Canada, various transportation companies, as well as from estimates made for traffic through Watson Lake where no physical count is made, produce what is considered to be a quite reliable body of trend data for Yukon. However, it does not indicate the actual number of tourists traveling in and through Yukon, since any visitor passing through Yukon enroute to Alaska, who subsequently **re-enters** Yukon enroute back south, is counted twice. Similarly, **Yukoners** traveling wholly within Yukon without crossing a border are not counted at all in these statistics.

The number of tourists traveling in Yukon in 1981 is estimated to be as follows, computed by major **traveller** characteristic:

- A. **Yukoners** traveling within Yukon taking an average of about 5.5 trips each, account for 136,000 tourist trips: 136,000
- B. Visitors to Yukon (i.e., non-residents) spending one or more nights in Yukon during their entire trips, with double counting caused by entering Alaska and recentering Yukon eliminated:
- Mode of travel when departing from Yukon:
- | | |
|--|----------------|
| Auto : | 99,000 |
| Bus : | 14,000 |
| Air: | 46,000 |
| Rail: | 41,000 |
| Total non-resident visitors spending one night or more in Yukon: | 200,000 |

c. Visitors to Yukon (ie non-residents)
spending less than one day in Yukon
during their entire trip: 71,000

Estimated **total** number of person trips
into and within Yukon by Yukoners and
visitors traveling for tourism related
purposes regardless of duration of trip
in Yukon: 407,000

Therefore, 271 thousand non-resident tourists visited Yukon in 1981. In addition, about 136 thousand tourist trips within Yukon result from multiple trip taking by residents of Yukon. A combined total of 407,000 tourist trips results.

Resident and Non-Resident Tourism

Given that this approximation of the number of tourist trips occurring into and within Yukon is reasonable, it deserves some explanation.

On first examination, it could be concluded that Yukoners account for one third of the tourism in Yukon. This is not true. Obviously local residents take many tourism related trips each year within the Territory to visit friends, relatives and favourite outdoor recreation areas, to attend events such as curling **bonspiels**, winter carnivals, festivals, and to sightsee or go shopping in Whitehorse and other centres. The vast majority of these are of short duration, a day or a weekend, and many probably involve relatively low expenditures for food and accommodation while on the trip, since food can be brought from home, and a camper, cabin, tent or friend's home may well be used for accommodation. For many trips by Yukoners, **gas, meals** out, shopping and entertainment may well be the only direct or visible tourism expenditures they make while on the trip. However, when tourism-related expenditures made prior to a trip are considered, overall tourism impact by Yukoners becomes more significant. Purchases in Yukon of goods and services such as camping gear, sporting equipment, food, alcohol, and vehicle maintenance/modifications required for recreational trips all contribute to the tourism industry. Therefore, Yukoners as local tourists make significant though often less visible contributions to the tourism industry and economy.

Non-resident visitors are completely different. Their vacation trips often last longer in Yukon, since they are in Yukon for perhaps the only opportunity in their lives, and they want to see as much as possible. They are far more likely to use commercial accommodation, since many travel by mass mode rather than by personal transportation.

CHART #6

PERCENT OF YUKON VISITORS PARTIES USING DIFFERENT TYPES OF ACCOMMODATION IN YUKON,

Visitors Categorized by Mode of Travel Used When Departing Yukon, 1978

	Rail Visitors	Motorcoach Visitors	Air Visitors	Auto Visitors
Hotel/Motel	80%	81%	59%	19%
Resort/Lodge	14%	17%	4%	1%
Commercial Campground	6%	1%	4%	23%
Government Campground	6%	0%	6%	48%

Source: Northern Travel Survey - 1978, Department of Tourism, Yukon

Note: Figures can not be **totalled**, as more than one type of accommodation is often used by travelers during a trip.

Based on this Chart and the previous figures presented on number of visitors, those visitors parties traveling by automobile/personal vehicle account for about half(99,000/200,000) of all non-resident visitors staying one night or more, and exhibited the lowest overall tendency to use hotels/motels and resorts/lodges. In comparison, the other half of non-resident visitors staying one night or more, those traveling by air, bus and rail, were much more likely to use these types of accommodation. About eighty percent of these visitor parties departing from Yukon by rail or bus stayed in Yukon hotels and motels, as did about 60 percent of air visitors. Of these three categories of visitors traveling by mass mode, air visitors make least use of highway lodges and resorts, since their trips tend to be destination point specific rather than of a touring variety like **those of** bus and rail travelers.

Summary - How Many Tourists?

To summarize this section then, roughly 407 thousand tourist trips were made into/within Yukon in 1981. Yukon residents appeared to account

for about one third of these numerically, though their trips were probably much shorter and had much less impact upon certain sectors of the industry, particularly the accommodation sector and distribution channels, since Yukoners often take day trips, use **personal** transportation camp, and visit with friends and relatives. However, their direct and indirect impact on the other four sectors is important. Non-resident tourists account for the other two thirds of tourist-related trips in Yukon, and have far greater visible impact throughout the different sectors of the industry, due to their "longer periods of stay and their dependence upon locally provided goods, services and facilities for many of their essentials, such as transportation, food and beverages and accommodation. All tourists, both resident and non-resident, contribute directly to the events and attractions sector, and to the recreation, entertainment and miscellaneous services sector.

This "answer" is an approximation developed in part from methodology devised by Thorne Stevenson & Kellogg, a tourism research firm. Their methods and assumptions have been somewhat modified by the Department of Tourism, based on local market knowledge. More precise data is obtainable on tourist characteristics, communities visited, length of stay, etc. from the Department of Tourism & Economic Development, Tourism Planning & Development Branch

ESTIMATED TOURIST EXPENDITURES IN YUKON

Overall Estimate

Detailed data on tourism expenditures in Yukon is not available. However, through a process of assumptions and pooling of data from various sources and surveys, it is estimated that direct tourist expenditure in Yukon exceeded \$51 million in **1981**.

This estimate is based on first subdividing our tourist traffic into distinct groups, such as the following:

- Yukon residents vacationing **in** Yukon;
- U.S. and non-Yukon Canadian residents entering Yukon for one night or more; and
- Non-residents entering Yukon for less than 24 hours.

For each of these groups, some data is available on trip characteristics, trip expenditures, and numbers of people involved. By making assumptions when data is not available, the final conservative figure of \$51 million was arrived at. Of this \$51 million, all but \$3-4 million was spent by visitors, persons who do not live in the Territory.

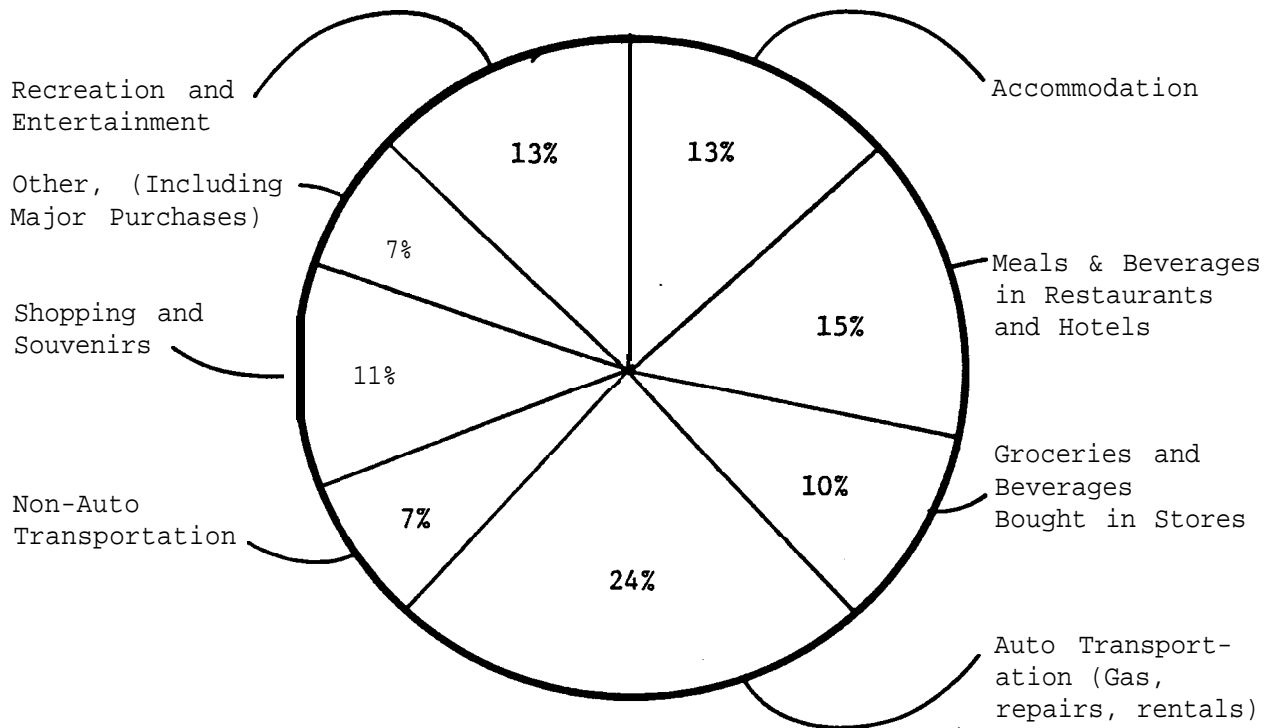
If the multiplier effect of this \$51 million in direct tourist expenditure in Yukon for 1981 is taken into consideration, the total impact of tourist spending amounts to at least \$65 million, if a very conservative multiplier of 1.276 is used, as was computed a few years ago by the Yukon Economic Impact Simulation Model. Other tourism organizations suggest that a multiplier of at least double that used here could well be valid.

Distribution of Tourism Expenditures in the Industry

The impact of this spending in Yukon by non-residents is felt throughout the different sectors of the tourism industry. Data obtained from the 1981 Coupon Conversion Study sponsored by the Department of Tourism to measure visitor traffic from elsewhere in Canada and the United States to Yukon as a result of various advertising programs confirms this. The following chart is based on that study, and illustrates where the average visitor's dollar went in Yukon during the summer, 1981.

CHART # 7

THE NON-RESIDENT'S TOURIST DOLLAR,
HOW IT WAS SPENT IN YUKON, 1981



Source: Derived from 1981 Coupon Conversion Study, Department of Tourism & Economic Development, Government of Yukon; Study undertaken by B.C. Research, Vancouver, B.C.

Research conducted during the combined World Cup-North American Cross Country Ski Championships in March 1981 indicates that winter visitors' spending patterns are somewhat different to those of summer visitors. In winter, the accommodation sector earned 20% of each tourist dollar, compared to 13% during the summer. The unavailability of low cost campground accommodation in winter is most likely responsible for boosting this average. Food expenses, on the other hand, were remarkably close for both summer - 25 percent - and winter 22 percent. Thus, even in winter, tourism dollars are readily divided amongst the various sectors of the industry.

More detailed information on direct tourist expenditures is provided in Exhibit #10 immediately following this section.

Yukon Border Crossings & Estimated Expenditures, 1969 - 1981

<u>Calendar Year</u>	<u>No. Of Persons Entering Yukon</u>	<u>Estimated Expenditures</u>
1969	137,262	\$ 8,882,030
1970	156,416 (13%)	10,167,040
1971	183,681 (17%)	11,939,265
1972	270,897 (21%) ¹	21,768,750
1973	311,374 (14.9%)	25,021,000
1974	325,310 (4.5%)	26,161,000
1975 ²	318,063 (- 2%) ²	27,338,000
1976	306,792 (- 4%)	20,879,000 ³
1977	300,154 (- 2%)	29,074,000 ³
1978	362,905 (20%)	33 million ⁴
1979	362,174 (- 0.2%)	36 million ⁴
1980	340,440 (- 6%)	38 million ⁴
1981	386,772 (14%)	51 million ⁵

SOURCES: Transport Companies
Alaska Highway Traffic Count (1972 Adjusted)
Statistics Canada

¹ 21% represents real increase over 1971; figures resulting from new counting methods have been excluded for comparison purposes.

² Post-1974 figures on number of persons entering Yukon are taken from Statistics Canada Border Crossing Reports. Prior to 1975, figures represent Canada Customs Border Crossing Counts, which have a variance of -2% to 4.5% over Statistics Canada figures. This different counting technique has resulted in some minor changes to totals previously published.

³ Based on Tourism Expenditure Model (Yukon).

⁴ Rough expenditure estimate, projected from 1977 figure.

⁵ The 1981 figure of \$51 million is based on direct visitor expenditure data obtained through the 1981 Coupon Conversion Study. Since a different methodology was used, comparison of 1981 direct expenditures to those of previous years **would** be of doubtful validity. If it is assumed that all spending by US residents was in \$US in 1981, and that they received an average currency exchange of 1.18 to convert to Canadian dollars, the 1981 figure of \$51 million could rise as high as \$57 million. However, the rate of exchange is not fixed, some tourist establishments pay a much lower rate, and the figure of \$51 million, while conservative, is much closer to being realistic.

More detailed information on visitor expenditures is available from the Department of Tourism & Economic Development, Whitehorse,

POINTS OF ORIGIN OF YUKON VISITORS¹

Based on visitor registrations at Tourism Yukon-operated Visitor **Information** Centres during the period late May through late September, inclusive, the make-up of Yukon visitors has been steadily changing in terms of country of origin. Residents of Canada have been steadily increasing their share of **total** visitor traffic to Yukon, rising from 20% of total visitors in 1975 to 28% in 1981. In contrast U.S. originating visitor traffic is steadily dropping in share of total traffic, from 77% in 1975 to 63% in 1981. The most remarkable gains have been in traffic from Overseas and other countries, which has tripled its share of total visitor traffic from 3% in 1975 to 9% in 1981. (Chart #8).

Though U.S. originating visitation accounts for the largest share - 63% - of visitors registered at all five Visitor Information **Centres** throughout Yukon in 1981, the relative share of visitors from each market varies considerably at each Centre, as Chart # 9 indicates. At Haines Junction registrations by Canadian residents account for 13% of total visitation at the centre, compared to 82% for US residents and 5% for visitation from Overseas/Other Countries. Much the same pattern was noted for Beaver Creek. In contrast to this, at Dawson City and Whitehorse, the traffic is much more balanced amongst the three markets, with Overseas/Other Countries originating traffic accounting for 12-13% at each centre, and the remaining 88% or so split fairly evenly between Canadian and U.S. originating visitation. Watson Lake's visitation approximates that of Whitehorse, though U.S. originating visitation is dominant.

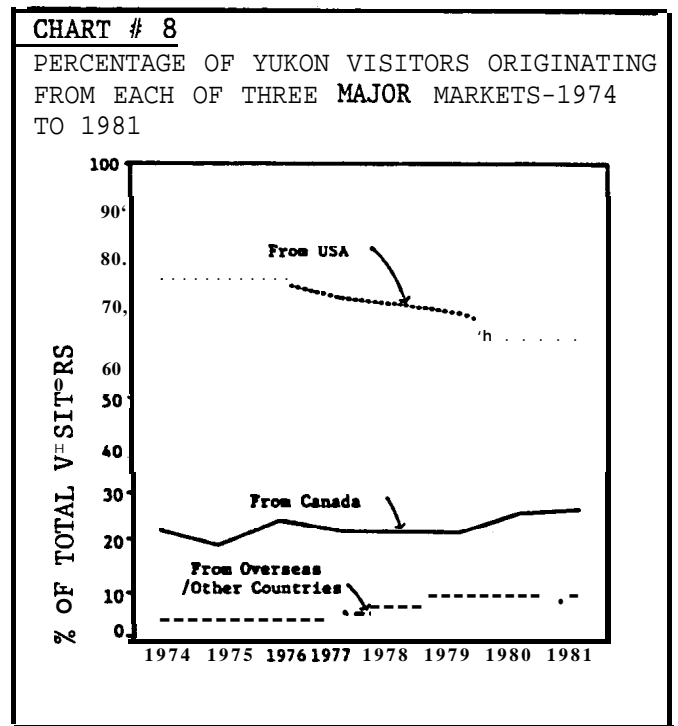
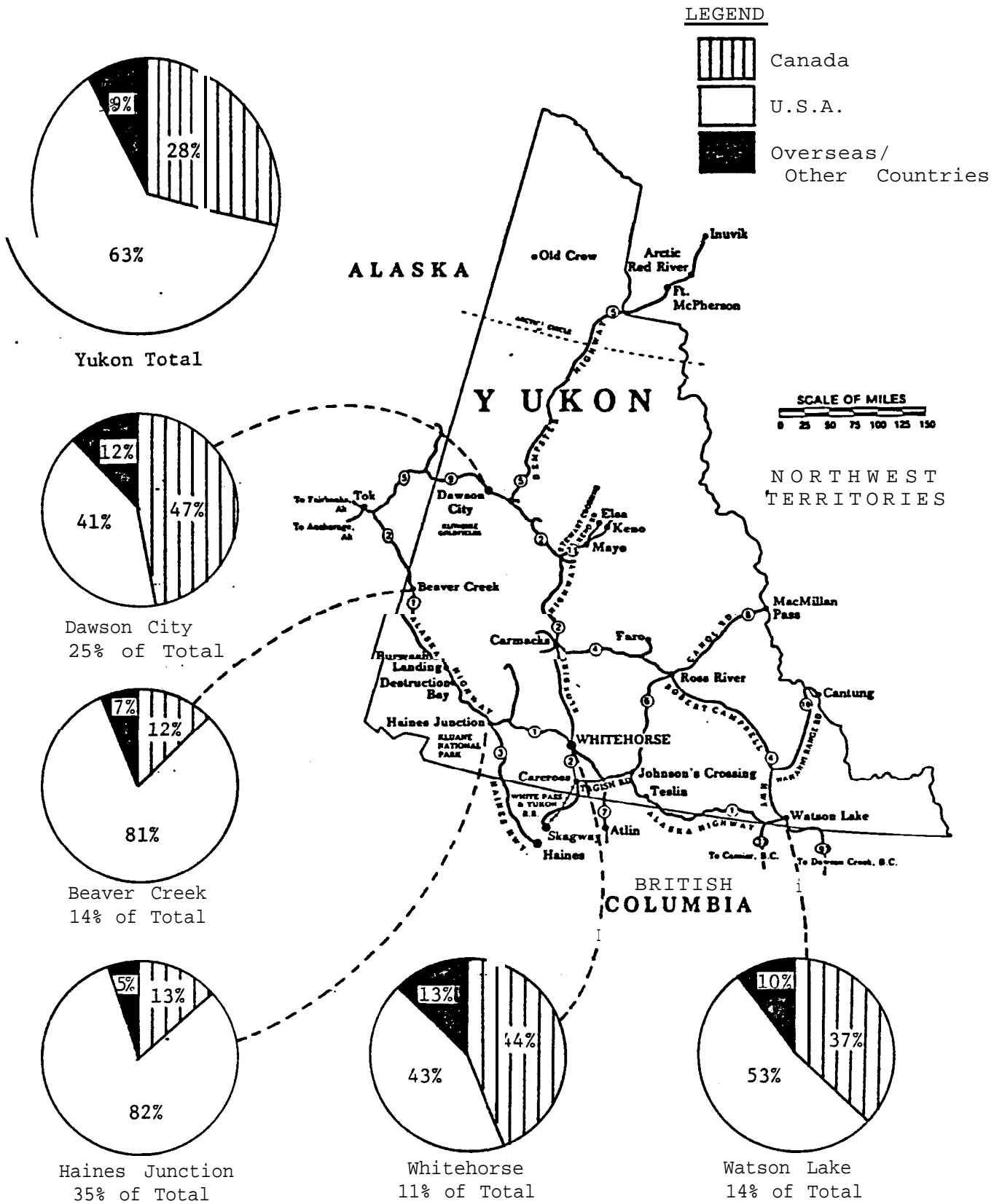


CHART # 9

COMPARISON OF PERCENTAGE DISTRIBUTION OF VISITATION AT TOURISM YUKON INFORMATION CENTRES BY RESIDENTS OF YUKONS 3 MAJOR ORIGIN MARKETS, 1981



The increasing numbers of Canadians visiting Yukon in relation to visitors from the United States has a very beneficial effect - Canadians tend to stay twice as long in Yukon as do Americans. The 1978 Northern Travel Survey found that , of visitors departing from Yukon by air, Canadians had typically spent 12 days in Yukon, compared to 7 days **by** Americans. By rail, Canadians had stayed 9 days versus 4 days **by** Americans, and by **motorcoach**, the figures are Canadians 5 days and Americans 2 days. Part of the explanation for the higher length of stay by Canadian visitors is that many Canadians come to Yukon for business or to visit friends and relatives, while Americans either passed through the territory or were on a packaged sightseeing tour. Similar data is not available on visitors to Yukon from Overseas/Other countries.

These calculations are based on a combined total of 111,101 visitor registrations in 1981 at five Visitor Information Centres operating throughout Yukon each summer. Of this total number of visitors who registered, 69,910 were from the US, 31,394 from Canada (including Yukon) and 9,797 from Overseas and Other Countries.

During the past four years, from **1978** to 1981, the total number of people registering at Yukon Visitor Information Centres has changed considerably, dropping between 1978 and 1979, increasing slightly in 1980 and rising in 1981 to the highest levels yet. However, when the number of visitors registering from each of the three major origin markets is compared for these three years, the differences that emerge are quite startling.

The number of visitors registering in 1979 from the United States and Canada dropped 15-20% from 1978, **while** visitor registrations from Overseas/Other Countries rose 14% in 1979 and continued with an additional 13% increase in 1980. Canadian registrations surged ahead in 1980, reversing the previous year's decline and recording a **21%** increase. In contrast, US registrations continued to decline, though marginally, in 1980. Registrations from all three markets rose strongly in 1981, with increases ranging from 22-28% over 1980, consistent with the strong increase in border crossing statistics for 1981.

¹See Exhibit #11 at the end of this section for important information about the sources and reliability of all "Origin" data.

Explanatory Information Concerning
Visitor Point of Origin Data

All analyses of **visitor points** of origin are based on registrations at **five** Visitor Information Centres located throughout Yukon at **major** access points. The Centres operate **during** the **period** late May through mid-September inclusive, and only record **visitors** who actually register voluntarily **in** the guest books.

The drawbacks of **using** these registrations to determine visitor points of origin are as follows:

visitors may register at more than one **Centre**;
since registration is voluntary, certain types/groups/
nationalities of **visitors** may be less **likely** to register
than others, due to language or other factors;

Therefore, there **is** no **pre-determined** sampling technique involved to ensure that all **visitor** categories are reliably represented.

On the plus **side**, however:

very **high** numbers of records are involved, **with** nearly 90 thousand visitors registered **in** 1980;
the percentages of Canadian and of American visitors **originating** from the various regions **in their** respective countries **in** 1978 based on these registrations, closely match **point** of origin data obtained by the Northern Travel Survey **in** 1978. Both data gathering methods operated **during** the same summer months at essentially the same locations, resulting **in** a **high** degree of comparability being possible.

The findings of the Northern Travel Survey (NTS) 1978 in comparison to those of the Visitor Information Centre (VIC) registrations for 1978 were as follows for visitation from Canada and the United States:

<u>Area of Origin</u>	<u>% of 1978 VIC Registrations by Canadians</u>	<u>% of 1978 NTS Visitors from Canada</u>
Ontario	25%	18%
Manitoba-Saskatchewan	11%	12%
Alberta	25%	27%
British Columbia	26%	34%
Other (excluding Yukon)	13%	9%
TOTAL & SAMPLE SIZE	100%=22,181	100%=1,733

	<u>Registrations by US Residents</u>	<u>Visitors from United States</u>
Alaska	9%	22%
Pacific Region	27%	27%
Mountain Region	9%	10%
West N Central	10%	7%
West S Central	6%	5%
East N Central	14%	12%
East S Central	3%	1%
Mid-Atlantic	7%	5%
South Atlantic	9%	7%
New England	3%	3%
Hawaii & Misc.	3%	1%
TOTAL & SAMPLE SIZE	100%=73,089	100%=4,303

Comparison of the findings for each of the sixteen regions covering all of the United States and Canada, aside from Yukon, shows a high level of data consistency for thirteen regions and discrepancies for three. The discrepancies for British Columbia and Alaska originating visitors are most likely due to the proximity of these regions to Yukon,

which reduces the need for B.C. and Alaska residents to obtain information on Yukon, their next door neighbour.

The high rate of visitation of Ontario residents to Information Centres in relation to their share of total Canadian visitors sampled by the Northern Travel Survey is more puzzling. Perhaps the explanation lies in the differences between the two data collection methods. The Northern Travel Survey obtained data on all visitors to Yukon, irrespective of purpose of travel, while the people most likely to visit Information Centres would be primarily tourists.

Conclusion: The point of origin data is probably valid, but should be used with caution until more research is available to substantiate or discredit the data.

UNITED STATES MARKET AS POINT OF ORIGIN

The United States Market, as Yukon's prime source of tourist visitors, is **also** undergoing important changes in terms of point of origin of US visitors to Yukon.

The number of visitors from each of the 11 different US regions dropped an average of 19% between 1978 and 1979 and dropped again between 1979 and 1980 by an average of **3%**. **1981** countered these declines with a 22% increase overall. Visitation from all **eleven** regions increased, based on Visitor Information Centre registrations, in many instances fully making up for the previous years' declines.

For 1981, ten US states as a group were the points of origin for 58% of the 69,910 US visitors registering at Yukon Visitor Information **Centres**. In descending order of number of visitors registered and percent share of total US visitors to these **Centres**, these states are:

<u>CHART # 10</u> <u>TOP TEN US STATES</u> <u>AS POINT OF ORIGIN</u>	<u>Number</u> <u>Of Visitors</u> <u>Registered</u>	<u>% of Total</u> <u>US Visitors</u> <u>Registered</u>	<u>% Change</u> <u>In Number</u> <u>From 1980</u>
California	10,930	16%	10%
Alaska	5,749	8%	22%
Washington	4,515	6%	18%
Florida	3,766	5%	18%
Texas	3,244	5%	70%
Michigan	2,698	4%	26%
Oregon	2,646	4%	84%
Wisconsin	2,412	4%	25%
Illinois	2,400	3%	nc
Pennsylvania	<u>2,313</u>	3%	20%
TOP 10 TOTAL	40,673	58%	

The following table identifies the eleven origin regions into which the US is sub-divided for analysis purposes, and presents data on the percent of US visitation to Yukon visitor information centres originating from each region. It also relates each region's share of US originating traffic to the region's share of the total US population in 1980 as an

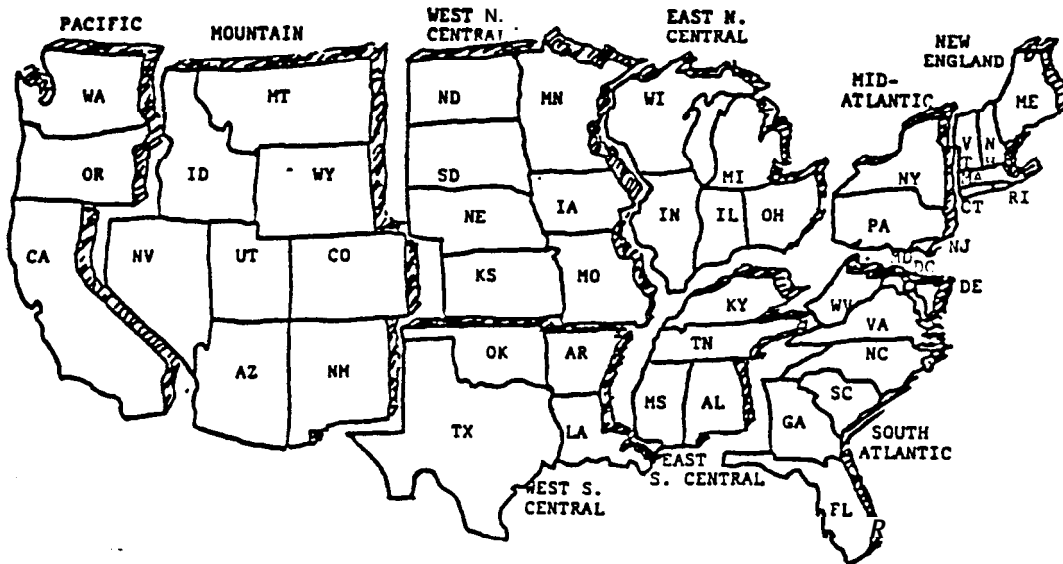
CHART # 11

REGIONAL POINT OF ORIGIN DATA ON US VISITORS TO YUKON IN 1981, BASED ON REGISTRATIONS AT VISITOR INFORMATION CENTRES AND US CENSUS DATA

ORIGIN	% Change In Numbers Of Visitors 1980 to 1981	% Share of US Visitors Originating From Each Region in 1981	% of us Population In Each Origin Region
Alaska	22	8	0.2
Pacific Region	19	26	13.4
Mountain Region	32	9	5.0
West N Central	53	10	7.6
West S Central	66	8	10.5
East N Central	13	15	18.4
East S Central	122	3	6.5
Mid-Atlantic	7	7	16.2
South Atlantic	27	10	16.3
New England	10	3	5.5
Hawaii & Misc.	--	--	0.4
US All Regions	22	100	100.0
TOTAL REGISTRATIONS		69,910	

indicator of the propensity of residents of each region to visit Yukon. For example, 26% of Yukon visitation from the US originates from the Pacific States, though only 13% of the US population lives there. In contrast, 3% of Yukon visitation originates from New England, home for nearly 6% of the US population.

UNITED STATES ANALYSIS REGIONS



One final aspect of visitation by US residents is interesting. In 1981, US originating visitors accounted for an average of 63 percent of **all** visitors recorded at Tourism Yukon's five visitor information **centres** in the Territory. However, this share of total recorded visitation varies considerably when each **centre is** considered separately

CHART # 12

REGIONAL VARIATIONS IN SHARE OF TOTAL RECORDED US VISITATION, 1981

Visitor Information Centre Location	% of Total Recorded Visitors Originating From US in 1981	Distribution of Visitors From USA By Information Centre Location
Haines Junction	82	45%
Watson Lake	53	12%
Dawson City	41	16%
Beaver Creek	81	18%
Whitehorse	4 3	8%
Average, All Locations	63%	100%

Haines Junction and Beaver Creek are located on the **Alaska** Highway, enroute to Alaska both from the ferry port at **Haines, Alaska**, and from south of '60 on the Alaska Highway. They therefore recorded high **levels** of US visitation.

In contrast, **Dawson** City is located up to a day's drive off the main highway to Alaska, and tends to attract far fewer US residents in relation to visitors from Canada and Overseas/Other Countries, based on the Visitor Information Centre registrations.

More detailed data on the United States as a point of origin for visitors registering at Yukon Visitor Information centres is provided in Exhibit # 12 immediately following.

Percentage of Yukon Visitors Originating from United States by Region, 1978 - 1981

ORIGIN	% of Total Visitors from All Markets				% of Total Visitors from Within USA				% Change in Number of Visitors		
	1981	1980	1979	1978	1981	1980	1979	1978	1981/80	1980/79	1979/78
Alaska	5	5	7	6	8	8	10	9	22	-18	-12
Pacific Region	16	17	20	19	26	26	28	27	19	-10	-14
Mtn Region	6	6	6	7	9	8	9	9	32	-4	-27
West N Central	6	5	5	7	10	8	8	10	53	2	-36
West S Central	5	4	4	4	8	6	6	6	66	6	-28
East N Central	10	10	10	10	15	16	15	14	13	4	-14
East S Central	2	1	2	2	3	2	2	3	122	-31	-35
Mid-Atlantic	4	5	5	5	7	8	7	7	7	17	-21
South Atlantic	6	6	7	6	10	10	10	9	27	-6	-11
New England	2	2	2	2	3	3	3	3	10	-13	-4
Hawaii & Misc.	--	3	2	2	--	4	3	3	--	51	-22
USA TOTAL*	63	64	69	71	100	100	100	100	22	-3	-19

*Columns may not add up to Totals due to rounding.

Origin regions are defined on following page.

CANADIAN MARKET AS POINT OF ORIGIN

During 1979, visitor traffic to Yukon Visitor Information Centres was down an average of 16% from 1978 from all provinces, territories and regions. Greatest decreases were noted for traffic from Ontario and East, plus from Northwest Territories and **local** visitation from within Yukon. In contrast to this, the number of registered visitors originating from **all provinces**, regions and Yukon, **excluding Northwest** Territories, increased from 1979 to 1980 with an overall increase in visitation of 22% being recorded. 1981 built upon these gains with an average 28% increase over 1980. Traffic from all provinces and regions was up in 1981, without exception.

CHART # 13
REGIONAL POINT OF ORIGIN DATA ON CANADIAN VISITORS TO YUKON IN 1981,
BASED ON REGISTRATIONS AT VISITOR INFORMATION CENTRES AND CANADIAN 1981
POPULATION ESTIMATES FROM STATISTICS CANADA.

<u>ORIGIN</u>	<u>% Change In Numbers Of Visitors 1980 to 1981</u>	<u>% Share of CDN Visitors Originating From Each Region in 1981</u>	<u>% of CDN Population In Each Origin Region</u>
British Columbia	26	28	11.2
Alberta	29	27	8.9
Sask-Manitoba	74	14	8.3
Ontario	13	20	35.7
Quebec	44	3	26.3
Atlantic Canada	69	2	9.4
NWT	26	2	0.2
Yukon	10	5	0.1
CANADA TOTAL	28	100	100%

As Chart #13 indicates, nearly three quarters of Yukon's visitors recorded at Tourism Yukon's five Visitor Information Centres are from west of the Ontario-Manitoba border

Distance is a major factor in Canadian visitation to Yukon.. **Chart #13** notes that over half (55%) of Yukon's Canadian visitors originate from British Columbia-Alberta, home of barely 21% of the Canadian population in 1981. By comparison, Ontario contains 36% of the Canadian population yet only 20% of Yukon's 1981 visitors originated from that province.

Unlike visitors from the United States, Canadian origin visitors are much more **likely** to visit Whitehorse and **Dawson City**. Forty-four percent of visitors recorded at the **Whitehorse** Visitor Information Centre in 1981 were Canadian, and 47% in **Dawson City**, the second most frequently visited centre in the Territory. Forty-two percent of the total number of registrations by Canadians at the five Visitor Information Centres occurred at Dawson. Overall, Canadian residents accounted for 28% of the total **visitation** recorded at the five Visitor Information Centres.

CHART # 14

REGIONAL VARIATIONS IN SHARE OF TOTAL RECORDED CANADIAN VISITATION, 1981

<i>Visitor Information Centre Location</i>	% of Total <i>Recorded Visitors Originating From Canada in 1981</i>	<i>Distribution of Visitors From Canada By Information Centre Location</i>
Haines Junction	13	16
Watson Lake	37	19
Dawson City	4 7	42
Beaver Creek	12	6
Whitehorse	44	18
Average, All Locations	28	100

More detailed data on Canada as a point of origin for visitors registering at Yukon Visitor Information Centres is provided in Exhibit # 13 immediately following.

percentage of Yukon Visitors Originating from Within Canada, by Region, 1978 - 1981

ORIGIN	% of Total Visitors From All Markets				% of Total Visitors From Within Canada				% Change In Number Of Visitors		
	1981	1980	1979	1978	1981	1980	1979	1978	1981/80	1980/79	1979/78
B.C.	8	8	6	6	28	28	28	24	26	22	- 3
Alberta	8	7	6	5	27	26	25	23	29	25	- 7
Sask./Manitoba	4	3	3	2	14	10	12	10	74	8	- 7
Ontario	6	6	5	5	20	22	22	23	1 3	25	-21
Quebec	1	1	--	1	3	2	2	3	44	22	-39
Atlantic Canada	1	1	--	--	2	2	2	2	69	22	-23
NWT	1	1	1	1	2	2	3	3	26	- 7	-32
Yukon	1	2	2	2	5	6	6	9	10	15	-39
Mist.	--	--	--	--	--	1	1	--	--	105	--
CANADA TOTAL*	28	27	24	23	100	100	100	100	28	21	-16

*Columns may not add up to Totals due to rounding.

OVERSEAS/OTHER COUNTRIES MARKET AS POINTS OF ORIGIN

Generalizations about traffic originating from this group of countries can not be made reliably, due to the markedly different trends observed in Information Centre visitor registrations from these countries.

Three European countries, plus Australia-New Zealand, are all prominent in terms of the share of total visitors from Overseas/Other Countries which they contribute. Germany alone accounted for 43% of the nearly 10,000 Overseas/Other Countries' visitors who registered at Yukon Reception Centres in 1981, an increase in share from its 1980 level of 38%. Switzerland accounted for 13%, and the United Kingdom 7%, consistent with 1980. Just these three countries, all in Europe, were the source for 63% of Overseas/Other Countries visitors who registered in Yukon. Australia contributed 12%, and New Zealand 3%, for an Australasia total of 15%, down from the 1980's combined total of 18%. Seventy-eight percent of Yukon visitors who registered but did not originate from Canada or the United States came from these five countries.

Analysis of the changes in numbers of registered visitors from these five Overseas countries from the years 1979, 1980 and 1981 in relation to the previous year highlights the significance of the top two origin countries - Germany and Switzerland. They are the only two contributors of significant numbers of registered visitors which have increased their visitor registrations in each year, with 1981's increase in the order of 40-44% over 1980 for each country.

Australia also deserves attention, as Yukon's third strongest source of visitors from Overseas/Other Countries. It has produced increased numbers of visitors in both 1980 and 1981, though its rate of increase dropped from 45% in 1980 to 5% in 1981. (See Chart 15)

CHART # 15

POINT OF ORIGIN DATA ON VISITORS TO YUKON FROM OVERSEAS/OTHER COUNTRIES IN 1981, BASED ON REGISTRATIONS AT VISITOR INFORMATION CENTRES IN YUKON

<i>ORIGIN</i>	<i>% Change In Numbers Of Visitors 1980 to 1981</i>	<i>% Share of Visitors From Overseas/Other Countries Originating From Each Area</i>
<i>Germany</i>	44	43
<i>Switzerland</i>	40	13
<i>United Kingdom</i>	13	7
<i>Netherlands</i>	10	4
<i>France</i>	44	3
<i>Sweden</i>	84	2
<i>Austria</i>	56	2
<i>Australia</i>	5	12
<i>New Zealand</i>	-6	3
<i>Japan</i>	53	1
<i>Mexico</i>	-16	- -
<i>Miscellaneous</i>	-3	9
<i>OVERSEAS/OTHER COUNTRIES TOTAL</i>	27	100

Preliminary analysis of visitor registrations at each of the five Visitor Information Centres in Yukon operated by Tourism Yukon shows, that while visitors from Overseas/Other Countries accounted for 9% of overall visitor registrations, this market's share of visitation at each of the five centres varies considerably.

CHART # 16 REGIONAL VARIATIONS IN SHARE OF TOTAL RECORDED VISITATION FROM OVERSEAS & OTHER COUNTRIES, 1981

<i>Visitor Information Centre Location</i>	<i>% of Total Recorded Visitors Originating From Overseas/Other Countries In 1981</i>	<i>% Distribution of Visitors From Overseas/Other Countries By Information Centre Location</i>
Haines Junction	6	22
<i>Watson Lake</i>	10	17
Dawson City	12	32
<i>Beaver Creek</i>	7	12
<i>Whitehorse</i>	13	17
Average, All Locations	9	100

*Numerically, nearly twice as many visitors from this market are recorded in **Dawson** in comparison to Whitehorse, and half of these **Dawson** visitors are from Germany.*

*More detailed data on Overseas/Other **Countries** as points of origin for visitors registering at Yukon Visitor Information Centres is provided in Exhibit # 14 immediately following.*

Percentage of Yukon Visitors Originating from Overseas

ORIGIN	% of Total Visitors From All Markets				1981
	1981	1980	1979	1978	
<i>Germany</i>	4	3	3	2	43
<i>Switzerland</i>	1	1	1	1	13
<i>United Kingdom</i>	1	1	1	--	7
<i>Netherlands</i>	--	--	--	--	4
<i>France</i>	--	--	--	--	3
<i>Sweden</i>	--	--	--	--	2
<i>Austria</i>	--	--	--	--	2
<i>Australia</i>	1	1	1	1	12
<i>New Zealand</i>	--	--	--	--	3
<i>Japan</i>	--	--	--	--	1
<i>Mexico</i>	--	--	--	--	--
<i>Mist .</i>	1	1	1	1	9
OVERSEAS/OTHER TOTAL*	9	9	8	6	100

*Columns may not add to Totals due to rounding.

--Denotes insignificant.

n/a - not available.

ACCOMMODATION SECTOR¹

Overview

The accommodation sector, consisting of hotels, motels, highway lodges, resorts, and campgrounds operated by the government and by the public sector earns about 13 percent of every dollar spent each day by tourists visiting Yukon during the peak season, from about June through September. In numbers, fixed roof accommodation establishments (hotels/motels/highway lodges) involved 79 establishments in 1981/82, and at least 52 campgrounds, about 45 of which were operated by the Government of Yukon.

The balance of the analysis contained in this section is limited to commercial fixed-roof accommodation, that portion of the industry which derives the largest portion of the tourist's dollar.

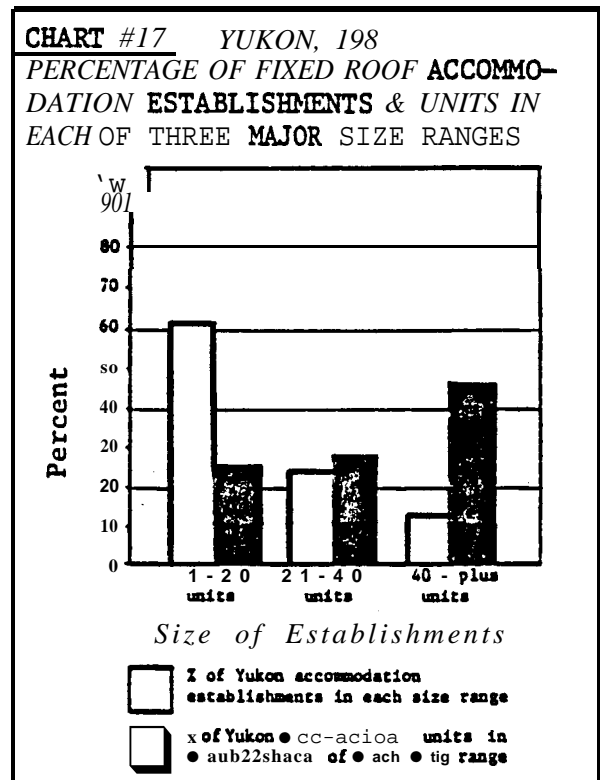
Size Distribution

The 79 fixed roof accommodation establishments known to be operational in 1981/82 offered a total of about 1906 units, comprising hotel/motel rooms and cabins.

Small establishments, those with 20 rooms or less, are most numerous, accounting for 61% of all fixed-roof accommodation establishments in Yukon, while large establishments, all offering 41 or more units, are small in number, amounting to only 31% of all establishments. See Chart #17, white bars.

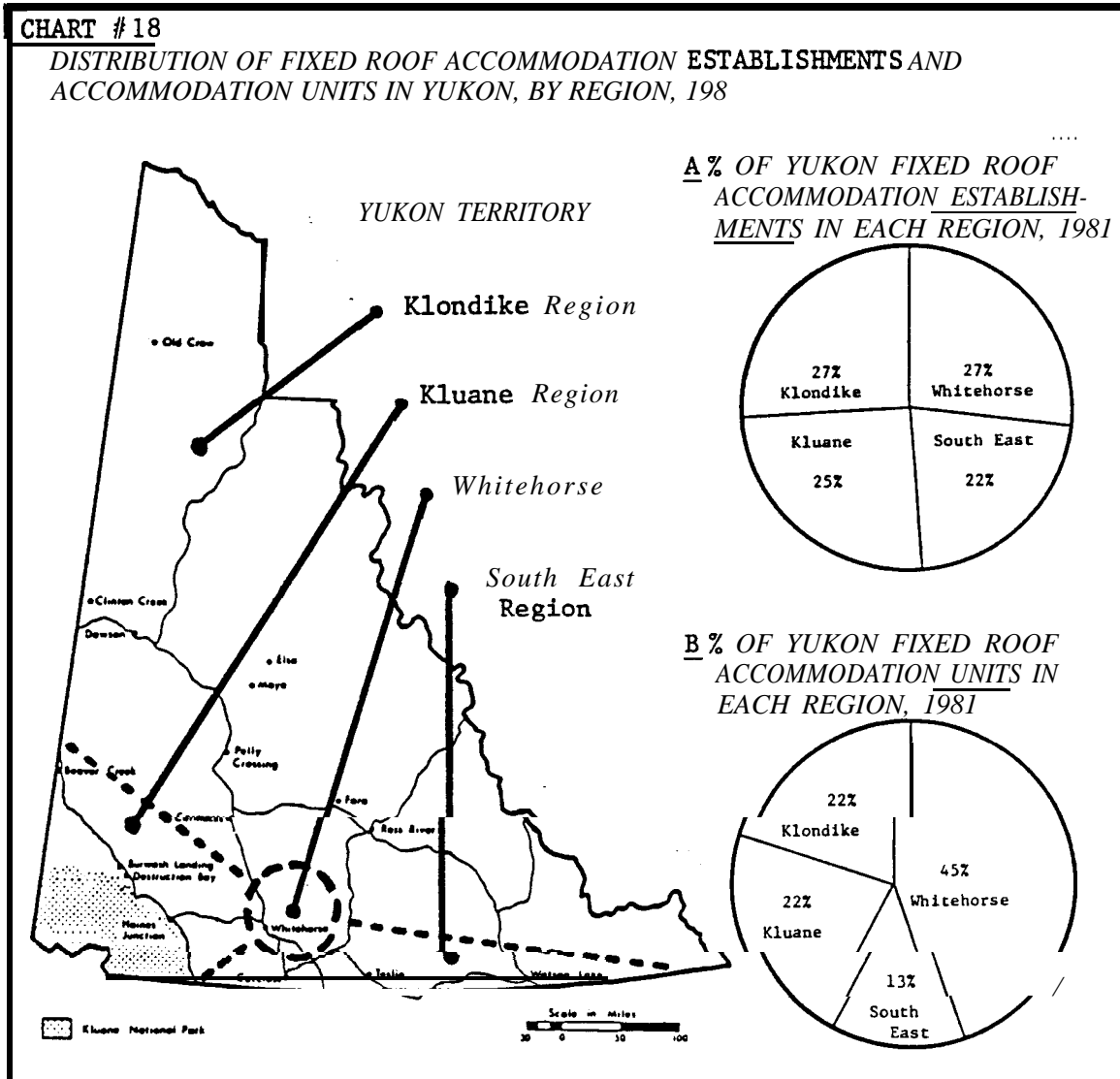
In contrast, as the black bars in Chart #17 indicate, the majority of Yukon's fixed-roof accommodation units - 46% - are in large establishments, while only 26% of all units are available from small establishments in the 1 - 20 unit size range.

¹Source: Calculated from data collected annually on accommodation establishments throughout Yukon and published in Tourism-Yukon's 1981/82 Travel Agent's Manual.

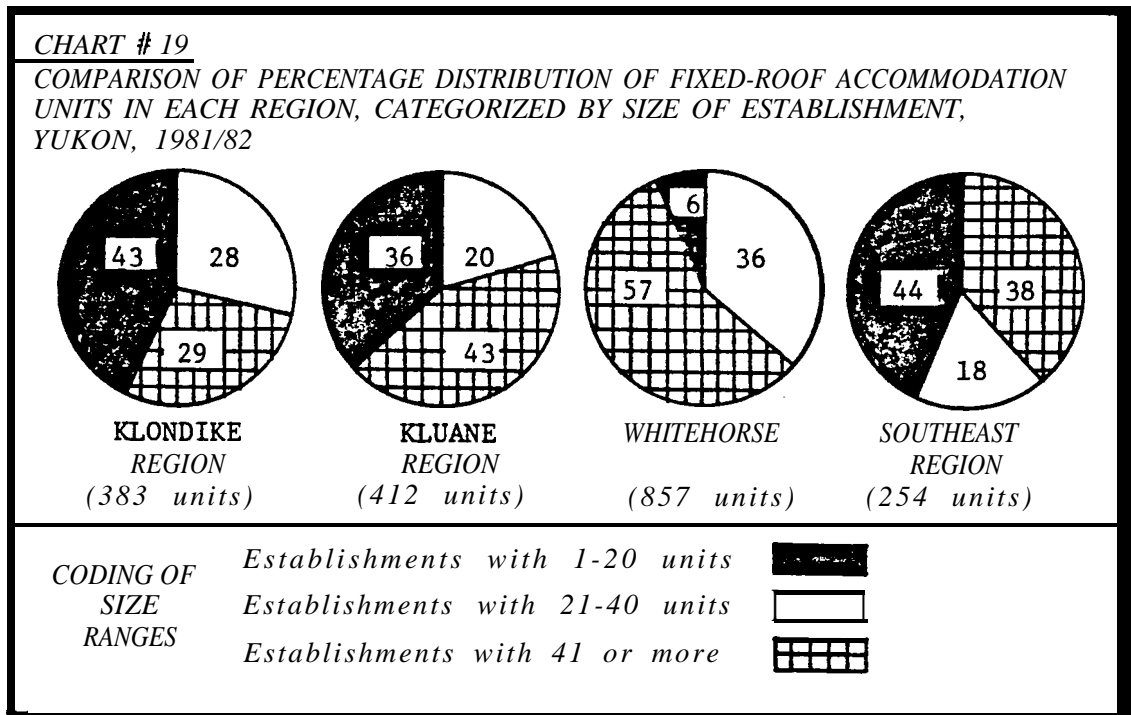


Regional Distribution

Numerically, fixed-roof accommodation establishments are spread almost equally amongst four major regions in Yukon. However, in 1981/82, the distribution of accommodation units is very uneven, as Chart #18 indicates. Forty-five percent of all fixed-roof accommodation units in Yukon are in Whitehorse, more than double the share occurring in any other region. Kluane region ranks second, with 22% of all units, followed by Klondike region with 20% and the South East with 13%.



Within each region there is a wide variety of accommodation offered in terms of sizes of establishments. Accommodation units in Klondike Region are fairly equally distributed amongst the small, medium and large categories of establishments. In Whitehorse, large and medium size establishments account for most of the accommodation offered, while in Kluane and the South East Region, small establishments account for about one fifth of the available units, with the remaining four fifths fairly equally divided amongst medium and larger establishments.



Seasonality of Supply

Many accommodation establishments depend upon the high traffic levels experienced during the peak season, from June through September. Once the season is over, 78 percent of the establishments, containing 76 percent of the total number of fixed roof accommodation establishments, remain open, while the remainder shut down for the winter.

On a region by region basis, seasonal variations are the lowest in Whitehorse, where about 95 percent of the establishments and available fixed roof units are open year round. In the other three regions,

between 70 and 75 percent of the establishments stay open, though the volume of rooms offered varies considerably from region to region. Eighty-seven percent of the units available during the summer in the South East region remain open in winter, in contrast to the 66 percent in the **Klondike** region and 41 percent in **Kluane** region.

Detailed information on the accommodation industry, providing data by region, and by year from 1979 to 1982, is included at the end of this section in Exhibits 15, 16 and 17 as follows:

- EXHIBIT # 15** *Summary of Hotel/Lodge/Motel Sector Yukon Tourism Industry - Number of Establishments, by Number of Units, 1979 - 1982*
- EXHIBIT # 16** *Profile of the Yukon Accommodation Sector, Number of Hotel/Lodge/Motel Establishments, by Size, Number of Units & Region, 1982*
- EXHIBIT # 17** *Regional Distribution and **Seasonality** of Yukon Fixed-Roof Accommodation Establishments, By Size of Establishment, 1981*

Accommodation Occupancy Rates

Occupancy data was not collected for the 1981 tourist season, -due to the low and erratic response rate for the survey in previous years. However, given the general increase in traffic recorded for 1981, it can be assumed that most accommodation establishments enjoyed at least satisfactory if not high occupancy rates.

Data on accommodation occupancy rates, by region and year, is provided in greater detail in Exhibit #18 at the end of this report, up to 1980. For the reasons noted above, it should be treated with caution.

Summary of Hotel/Lodge/Motel
Number of Establishments, by

NUMBER OF U N I T S	1979		19
	Number of Establishments	x of Units in Yukon	Number of Establishments
1 - 10	32	12.6	32
11 - 20	20	17.7	21
21 - 30	11	15.8	14
31 - 40	6	11.3	5
41 - 50	4	10.4	4
51 - 100	5	18.2	6
100+	2	13.9	2
TOTAL	80	100%	84
<i>Total Number of Units</i>	1,787		1,89

Source: Computed from Yukon Travel Agent

*Read as follows: Example - In 1982, 79
operational in Yukon on a year round or
1,906 units. Two establishments each of
combined accounted for 19% of the total
32 establishments, 1 to 10 rooms, jointly
offered in Yukon.*

Note: *The loss by fire of Watson Lake's
For the disappearance of 57 accommodation*

*Profile of the Yukon Accommodation
Number of Hotel/Lodge/Motel Establishments*

NUMBER OF UNITS	SOUTH EAST		WHITEHORSE		NUMBER OF ESTABLISHMENTS
	Number of Establishments	% of units in Region	Number of Establishments	% of units in Region	
1 - 10	8	19	2	1	
11 - 20	5	25	3	6	
21 - 30	2	18	5	16	
31 - 40	-		5	20	
41 - 50	1	18	2	11	
51 - 100	1	20	3	24	
100+			1	22	
TOTAL	17	100%	21	100%	
Total Number of Units	254		857		

Source : Computed from "Yukon 1982 Travel Agent Survey".
Read as follows: Example - In total, Yukon accommodation units in 1981, distributed among 79 different hotels/lodges/motels. Units in the 1-10 unit size range - account for 32 of 11% of the Yukon's total accommodation units. Units in the 11-20 unit size range account for 17% of all accommodation units in Yukon accommodation. Significant differences exist among the 4 tourist regions.

REGIONAL DISTRIBUTION AND SEASONALITY OF YUKON FIXED ROOF ACCOMMODATION ESTABLISHMENTS,
BY SIZE OF ESTABLISHMENT, 1981

TYPE OF ESTABLISHMENT BY NUMBER OF UNITS	R E G I O N								YUKON TOTAL	
	SOUTH EAST		WHITEHORSE		KLUANE		KLONDIKE			
	Number of Establishments	1 Year Round	Number of Establishments	1 Year Round	Number of Establishments	1 Year Round	Number of Establishments	1 Year Round	Number of Establishments	1 Year Round
1 - 10	8	38%	2	100%	12	83%	10	70%	32	69%
11 - 20	5	100%	3	100%	4	100%	5	80%	17	94%
21 - 30	2	100%	5	100%	3	33%	2	100%	12	83%
31 - 40	0	--	5	100%	0	--	2	50%	7	86%
41 - 50	1	100%	2	50%	0	--	1	100%	4	75%
51 - 100	1	100%	3	100%	0	--	1	100%	5	80%
100+	0	--	1	100%	1	0%	0	--	2	50%
TOTAL	17	71%	21	95%	20	75%	21	71%	79	78%
TOTAL UNITS	254	87%	857	94%	412	41%	383	66%	1,906	76%

Sources: Yukon Travel Agents Manual, 1981 & 1982.

Yukon Hotel/Motel Occupancy 1976 - 1980

	<u>1980</u>	1979	1978	<u>1977</u>	<u>1976</u>
<u>Southeast</u>					
Hotels/Motels	*47%	*48%	54%	51%	58%
<u>Whitehorse</u>					
Hotels/Motels	*62%	H: 61% M: 63%	H: 65% M: 75%	H: 65% M: 63%	H: 62% M: 32%
<u>Kluane</u>					
Hotels/Motels	*44% [#]	*48%	47%	39%	52%
<u>Klondike</u>					
Hotels/Motels	*53%	*34% ¹	42%	48%	35%
<u>All Regions</u>					
Both Types	57% [#]	48%	60%	56%	51%

SOURCE : Yukon Accommodation Occupancy Survey

#Excluding known construction crews and other industrial workers.

*In these cases, the response to our survey was insufficient to give an accurate sampling for the separate categories, therefore the hotel and motel surveys have been combined for these regions.

¹This figure must be used with caution, since three large establishments in the region did not report occupancy figures for 1979.

CAUTION:

THIS SURVEY WAS NOT CONTINUED FOR 1981, DUE TO THE GENERALLY LOW AND ERRATIC RESPONSE RATE IN PREVIOUS YEARS. THIS DATA IS OF DOUBTFUL RELIABILITY.

FOOD AND BEVERAGE SECTOR

Overview

The Yukon Food and Beverage Sector of the Tourism Industry derives substantial income from resident and non-resident tourists traveling in Yukon. Research conducted in 1981 indicates that on average about 25 percent of daily expenditures in Yukon by non-resident tourists goes to the purchase of food and beverage. This money is spent in licensed restaurants, cafes, lounges, taverns, fast food outlets, grocery stores, liquor stores and commercial off-sales liquor outlets.

*The number of these establishments throughout Yukon in 1981 is significant. Preliminary figures indicate that Yukon is served by 100 establishments serving prepared meals, 80 of which operate on a year round basis. Fifty-seven of these 100 establishments are licensed to serve **alcoholic** beverages with meals. In addition to these cafes, restaurants and fast-food outlets, there are approximately 46 public lounges and taverns specializing in alcoholic beverages, all of which are located in fixed roof accommodation establishments.*

The retailing of unprepared food and beverages for consumption off the premises through grocery stores, **liquor** stores and commercial off-sales of alcohol **plays a** significant part in the tourist's food and beverage expenditures, with many tourists spending 40 percent of their total food and beverage expenditures on unprepared food and sealed alcoholic beverages. Preliminary figures indicate that this component of the food and beverage sector consisted of at least 20 grocery stores, 5 government operated liquor stores, and 52 commercial establishments (mostly accommodation establishments) selling sealed alcoholic beverages for consumption elsewhere.

Regional Distribution and Seasonality

All types of establishments are located throughout Yukon. This is particularly true of grocery stores and liquor outlets, since they serve their local populations on a year round basis as well as seasonal tourists.

*Concentrating solely on food establishments which serve prepared food for consumption on the premises, it is evident that this portion of the food and beverage sector is regionally distributed on much the same basis as the fixed roof portion of the accommodation sector. Forty two of Yukon's 100 restaurants, cafes, coffee shops, and fast food outlets are located in Whitehorse, 15 are located in **Kluane** Region, and the remainder are split evenly between **Klondike** Region and the South East. When **seasonality** of operation is taken into consideration, 95% of these establishments in Whitehorse operate year round, while in each of the other three regions, just over two thirds operate year round.*

More detailed figures on the food and beverage sector of the tourism industry are presented in the Exhibit # 19 immediately following.

REGIONAL DISTRIBUTION AND SEASONALITY OF YUKON FOOD AND BEVERAGE ESTABLISHMENTS OFFERING ON-SITE CONSUMPTION OF PREPARED FOODS, BY TYPE OF ESTABLISHMENT, 1981 (Preliminary Figures)

TYPE OF ESTABLISHMENT	G I								YUKON TOTAL	
	SOUTH EAST		WHITEHORSE		KLUANE		KILONDIKE		Number of Establishments	% Year Round
	Number of Establishments	% Year Round	Number of Establishments	% Year Round	Number of Establishments	% Year Round	Number of Establishments	% Year Round		
Restaurants & Cafes licensed to serve alcohol with meals	13	69%	26	96%	10	60%	8	75%	57	81%
Restaurants, Cafes Coffee Shops and Fast Food Outlets not licensed to serve alcohol with meals	8	75%	16	94%	5	80%	14	64%	43	79%
TOTAL	21	71%	42	95%	15	67%	22	68%	100	80%

Sources: Yukon Travel Agents Manuals, 1981 and 1982

EVENTS & ATTRACTIONS SECTOR

Perhaps more than any other sector, the events and attractions **centre** is heavily dependent upon tourism for its livelihood. Businesses in other sectors, such as transportation, accommodation, and food and beverage, derive a portion of their annual revenue from other forms of traffic, such as movement of freight, provision of accommodation to migrant workers, and feeding the local population.

Events and attractions, on the **other** hand, largely cater to leisure time. The size of the sector is difficult to assess, but its scope and distribution is not. Events such as craft fairs, festivals, **bonspiels** and sporting events are held throughout the Territory, and draw **Yukoners** and non-residents alike. Attractions are also spread throughout the Territory and range from commercial attractions such as **Diamond Tooth Gerties Gambling Hall in Dawson** to historic and scenic attractions which do not derive direct revenue from visitors but which do provide a major incentive to people to come into and explore a community or region.

Attendance at events is difficult to measure, due to the short duration of the event and to the often large influx of locals, other **Yukoners**, and non-resident tourists who come to watch and participate.

Attractions, by virtue of their much longer periods of operations, provide an excellent barometer of the ups and downs in tourist traffic experienced by a community or region from year to year.

The following pages summarize the visitation records maintained by twenty-four different attractions located throughout Yukon, on a region by region basis.

ATTENDANCE AT REGIONAL ATTRACTIONS AND VISITOR INFORMATION CENTRES

Watson Lake

Attendance at the Visitor Information **Centre** in Watson Lake rose significantly in 1981, recording a 70% increase over 1980. The 1981 visitation surpasses that of any of the previous five years for which figures are available.

Whitehorse

Visitor attendance at Whitehorse attractions and information centres registered increases in **1981** over 1980. The prime attraction in terms of number of visitors was the S.S. **Klondike** Historic Site, which received 40,000 visits **in** 1981, up nearly **25%** over the previously recorded high in 1979. The McBride Museum recorded an exceptional **increase in traffic, while** the Whitehorse Visitor Information Centre recorded a 19% gain over 1980's total, but failed to match the records set in 1978 and 1979. Estimated 1981 traffic on the **Chilkoot** Trail rose about 8% over 1980, with about 2,500 backpackers completing this historic trek.

Dawson

Dawson City visitation as recorded at nine different attractions generally rose over 1980, in many instances matching or exceeding previously recorded highs. Overall, Parks Canada's historic sites received about 13% more visitors, the **Dawson** City Museum showed a major increase of 25% in visitations, and the Visitor Information Centre received about the same number of visitors in 1981 as in 1980. In total, these gains more than make up for the significant decline in traffic noted in Dawson City in 1979 over 1978.

Haines Junction & Kluane National Park

The Visitor Information Centre operated by Tourism Yukon in Haines Junction recorded a 47% increase in traffic over **1980**, building upon 1980's increase of 88%. The opening, in August 1980, of Parks Canada's new **Kluane** Visitor Information Centre at Haines Junction has definitely contributed significantly to this overall increase in visitor traffic. Bus tours in particular have mushroomed in volume at the Centre, due to the static and audio-visual displays being offered about **Kluane** National Park.

In addition to the nearly 39,000 visitors to the Haines Junction centre recorded by Tourism Yukon, nearly 6,000 **people** visited the Parks Canada facility outside of Tourism Yukon's mid-May, mid-September season.

Elsewhere in **Kluane** National Park, over 10,000 **people** visited Parks

Canada's Sheep Mountain information **centre**, and 1237 backpackers registered **with** officials prior to trips of one night or more into the interior. Kathleen Lake Campground, the only one operated by Parks Canada, had 42 sites open in 1981, and **was** frequently busy.

Beaver Creek

The number of visitors registering at Beaver Creek Visitor Information Centre dropped again in 1981 most **likely** due to the increasing attractiveness of the joint Parks Canada-Tourism Yukon visitor centre in Haines Junction.

Faro & Yukon River

Elsewhere in Yukon, the popularity of Cyprus Anvil's tour of their Faro lead-zinc mine is growing, with nearly 600 visitors recorded in 1981, double 1980's visitation. This **is the** first indicator available for tourist activities along the Robert Campbell Highway.

A rough indicator of canoe traffic on the Yukon River is provided by the guest book at Fort Selkirk, an abandoned community now being stabilized and restored at the confluence of the **Pelly** and Yukon rivers. Since it is some 30 miles from the nearest public road, most registrations will be canoeists. In 1981, over 700 people signed the guest book, compared with about 900 in each of the previous three years. Since the main objective of the guest book is not the collection of statistical data, it is likely that actual visitation is far higher.

Detailed figures indicating the numbers of visitors recorded at specific attractions and Visitor Information Centres throughout Yukon, plus trends over the past number of years, are included in Exhibit # 20 immediately following.

ATTENDANCE AT VISITOR ATTRACTIONS AND INFORMATION CENTRES 1976 - 1981

	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>
<u>Parks Canada, Whse.</u>						
S.S.Klondike	23,824	31,795	29,024	32,342	31,404	40,252(1)
Chilkoot Trail	1,491	1,523	1,948	2,309	2,332	2,515(2)
<u>Parks Canada, Dawson</u>						
<i>Palace Grand-Day</i>	8,351	11,166	11,425	10,195	11,651	27,656
<i>Palace Grand-Follies</i>	16,180	17,607	22,374	20,001	17,556	15,368
<i>S.S. Keno</i>	11,825	13,436	15,650	12,041	14,275	13,561
<i>Robert Service Cabin</i>	7,855	8,706	16,112	14,370	16,650	18,155
<i>Old Post Office</i>	12,304	18,496	12,762	14,108	15,568	11,342
<i>D r e d g e #4</i>	---	7,590	13,200	15,072	20,504	22,943
<i>Barrington's Store</i>	---	--	8,383	5,790	6,702	<u>7,066</u>
						<u>116,091</u>
<u>Parks Canada, Kluane</u>						
<i>Sheep Mtn Info Centre</i>	---	942	n/a	1,127	6,695	10,129
<i>Backpackers</i>	---	---	---	---	1,083	1,237
<i>Kathleen L Campground</i>	---	---	---	1,765	973	1,158*
Haines Junction <i>Interpretive Centre</i>	---	1,416	6,018	6,771	28,726	51,827(3)
<u>Yukon River</u>						
<i>Fort Selkirk</i>	573	628	955	928	909	713(4)
<u>Mine Tour</u>						
Faro:Cyprus Anvil	---	---	---	---	300	593
<u>Museums</u>						
<i>McBride Whitehorse</i>	24,390	30,000	27,792	39,965	32,797	75,830
Dawson City	10,578	14,482	13,808	12,258	12,004	15,024(5)
Burwash	7,150	8,961	12,000	14,388	n/a	n/a
Teslin	200	404	690	860	n/a	300(6)
<u>Tourism Yukon Information Centres</u>						
<i>Watson Lake</i>	10,498	9,423	11,199	9,262	9,335	15,875
<i>Whitehorse</i>	4,898	8,339	14,897	13,429	10,635	12,698
Haines Junction	16,255	17,144	23,310	14,063	26,411	38,864(7)
<i>Beaver Creek</i>	24,486	26,515	25,959	26,123	17,429	16,030
Dawson City	<u>20,376</u>	<u>25,181</u>	<u>27,938</u>	<u>23,453</u>	<u>27,780</u>	<u>27,634</u>
INFORMATION CENTRES						
TOTALS	76,513	86,602	103,303	86,303	91,590	111,101

*Parties, about 3 persons per party

NOTES RELATED TO EXHIBIT

1. *S.S. Klondike re-opened July 1, 1981 as a completely restored vessel with a new interpretive centre and fresh landscaping.*
2. *2,515 people hiked the entire Chilkoot Trail in 1981, out of the 2,701 who registered with Parks Canada.*
3. *Parks Canada and Tourism Yukon opened a new joint visitor information and Kluane Park interpretation centre in May 1980 at the new Kluane National Park Headquarters Building in Haines Junction. A very popular Kluane Audio/Visual show opened in August 1980, boosting visitation since then.*
4. *Fort Selkirk is an abandoned settlement on the Yukon River about half way between Whitehorse and Dawson City. Now being stabilized by the Yukon Government, it is only accessible by boat or air. It is a popular stopping point for canoeists.*
5. *Dawson Museum figures for 1978, 1979 and 1980 have now been revised slightly downwards from previous reports based on more complete statistics from the Museum.*
6. *Teslin Museum did not open until August during 1981 season.*
7. *See note (3) above. Parks Canada records visitors year round, while Tourism Yukon only covers the period May through September, thus Tourism Yukon's figures for the centre are lower.*

RECREATION, ENTERTAINMENT & MISCELLANEOUS SERVICES SECTOR

Overview

This sector is really a catch-all, intended to include the variety of facilities and services which are essential to the tourism industry, which provide many jobs for Yukoners, but which do not fit into the other traditional industry sectors.

Research sponsored by the Department of Tourism in 1981 concluded that visiting tourists spent about 13 percent of their daily expenditures in Yukon on "recreation and entertainment", and additional 11 percent on "shopping and souvenirs". These figures were developed through an analysis of the characteristics and activities of over 30,000 visitors to Yukon in 1981 who requested Yukon/Alaska travel literature before coming. Given that up to 24 percent of each dollar spent by these visitors goes to this sector, the components of this sector deserve close attention.

Composition

Two main groups of commercial enterprises are evident in this sector, those dependent primarily upon non-residents visiting Yukon, and those catering to both local residents and tourists alike.

*In the first group are the wilderness vacation operators, each specializing in offering one or a few forms of wilderness/adventure travel. These activities include: guided and non-guided wilderness **experience** vacations, involving back packing, river running, extended ski tours, dog sled trips, nature appreciation and mountaineering; guided fishing trips; and guided big game outfitting. All of those trips and activities are offered by Yukon-based companies, mostly owned and operated by Yukon residents. The 1981/82 travel agents **manual** published by Tourism Yukon lists seven companies offering canoe and boat rentals, twenty companies offering guided wilderness experience vacations and expeditions, twelve featuring fishing, and twenty big game guiding outfitters who cater almost exclusively to non-resident hunters. All of these companies play a distinctive role in Yukon's tourism industry, by catering to tourists who seek a more intimate wilderness vacation in preference to touring throughout Yukon. To the overall tourism economy, this means that the industry is diversified, catering to a broad range of tourist interests.*

The second broad component of the sector, which caters to local residents and tourists as well includes retailers of sporting goods and recreational equipment, entertainment centres such as cinemas, and bowling alleys, cultural centres such as live theatres, shops selling camera film and health care products, and services such as laundromats and barbers.

*In total, as many as 100 or more **local** businesses in this sector contribute to and benefit from the tourism industry. Unfortunately, very little data is available to measure this sector further.*

DISTRIBUTION SERVICES SECTOR

This least understood of the six sectors concerns itself with facilitating the movement of visitors, through the provision of a range of services that simplify trip planning. This component of the Yukon tourism industry often goes unnoticed, since most businesses are based outside of Yukon in the market areas from which Yukon draws its tourist business.

The front line is the travel agency, of which there are some 20,000 located throughout Canada and the United States. At least six are located in the Territory.

*Less visible than the travel agent are the tour operators and wholesalers, those companies that package travel, assembling vacation components such as accommodation, transportation, inter-city touring, events and attractions, and food and beverage **services** into pre-planned, inclusive-price vacation experiences which are marketed primarily through travel agents. Approximately 13 percent of Yukon's 1981 visitors who previously requested Yukon travel information travelled in Yukon as part of a packaged tour. Most often these were group tours, traveling along at least a part of their **pre-set** itinerary by **motorcoach**.*

The main attractions of an inclusive priced packaged vacation to the consumer are that the planning is done for the consumer, all key facilities are prebooked, the major costs of the vacation are known in advance, and facilities and services such as an escorted tour bus are possible through packaging which a consumer traveling independently would not have the opportunity of using.

*In Tourism Yukon's 1982 travel agent's manual, 111 tour companies are listed, all of whom offered **pre-planned** packages featuring Yukon alone or in conjunction with other destinations such as western Canada, the Inside Passage and Alaska. Most of these companies assemble and operate their own tours, while others, particularly in Overseas & Other Countries, wholesale packages assembled by Canadian ground operators, including two based in Yukon. On a market by market basis, these tour operators/wholesalers are distributed as follows:*

Canada	37
USA	33
Mexico	2
German-speaking Europe	21
Netherlands	7
United Kingdom	5
Australia-New Zealand	4
Other	<u>2</u>
	111

The third component of the Distribution Channels Sector includes public and private sector organizations working on **behalf** of their **local** industries to market Canada and Yukon. Yukon's **two** tourism industry associations - the Yukon Visitors's Association and the **Klondike** Visitors Association - co-operate closely with the Territorial Department of Tourism, **local** air carriers, the Canadian Government Office of Tourism, and others, including Parks Canada, to **make** potential visitors more informed about Yukon and its tourism industry, with the prime objective of attracting visitors.

Performance data on this sector is limited. However, to use **Dawson** City as an example, most accommodation establishments have more group tour traffic than they can handle, and a few major tour operators have had to remove Dawson from their bus tour itineraries due to accommodation shortages. This problem will be largely rectified in 1982 with the completion of a new medium-sized hotel and the expansion of an existing motel. 1978 data on Yukon visitors traveling by bus indicates that, back then, 75 percent of visitor parties traveling by bus overnight in Whitehorse and 80 percent overnighed in Beaver Creek. Six percent visited **Dawson**, and typically stayed two nights. Watson Lake was the only other community to accommodate significant numbers of bus travelers though less than 1 percent of all bus tourists overnighed there. Though more recent comparable data is not available, **Dawson City** is known to have increased its rate of visitation by bus tours, since border **crossings** by bus from Alaska into Yukon at **Dawson** have doubled between 1978 and 1980, and maintained these gains in 1981.

CONSTRUCTION ACTIVITY RELATED TO THE YUKON TOURISM INDUSTRY

During 1979 and 1980, it is estimated that \$10.7 million dollars of construction activity related to tourism occurred in Yukon. In 1981, building permits **totalling** \$2.1 million were issued for tourism related construction, giving a two year total for 1980-1981 of \$10.7 million.

It is most likely that much of the justification for this construction activity is not directly related to tourism. However, the tourism industry does derive secondary benefits from much of this activity, and, as such, these expenditures do contribute significantly to the health and growth of the industry.

Detailed dollar amounts scheduled to be spent on various types of projects are provided in Exhibit #21 immediately following.

Exhibit #21 - Construction Activity Related to the Tourism Industry

	(measured in \$ thousands)		
	<u>Estimated 1979</u>	<u>Estimated 1980</u>	<u>Estimated 1981</u>
Accommodation	\$ 715	\$ 1,366	\$ 1,029
Food Services	22	10	123
Attraction/Recreation	1,266	1,454	681
Retail	97	4,574	24
Transportation	12	1,200	250
Total Spending	<u>\$ 2,112</u>	<u>\$ 8,604</u>	<u>\$ 2,106</u>
TOTAL 1979 & 1980		<u>\$10,716</u>	
TOTAL 1980 & 1981			<u>\$10,710</u>

Source: Building permits issued during calendar years 1979, 1980 and 1981.