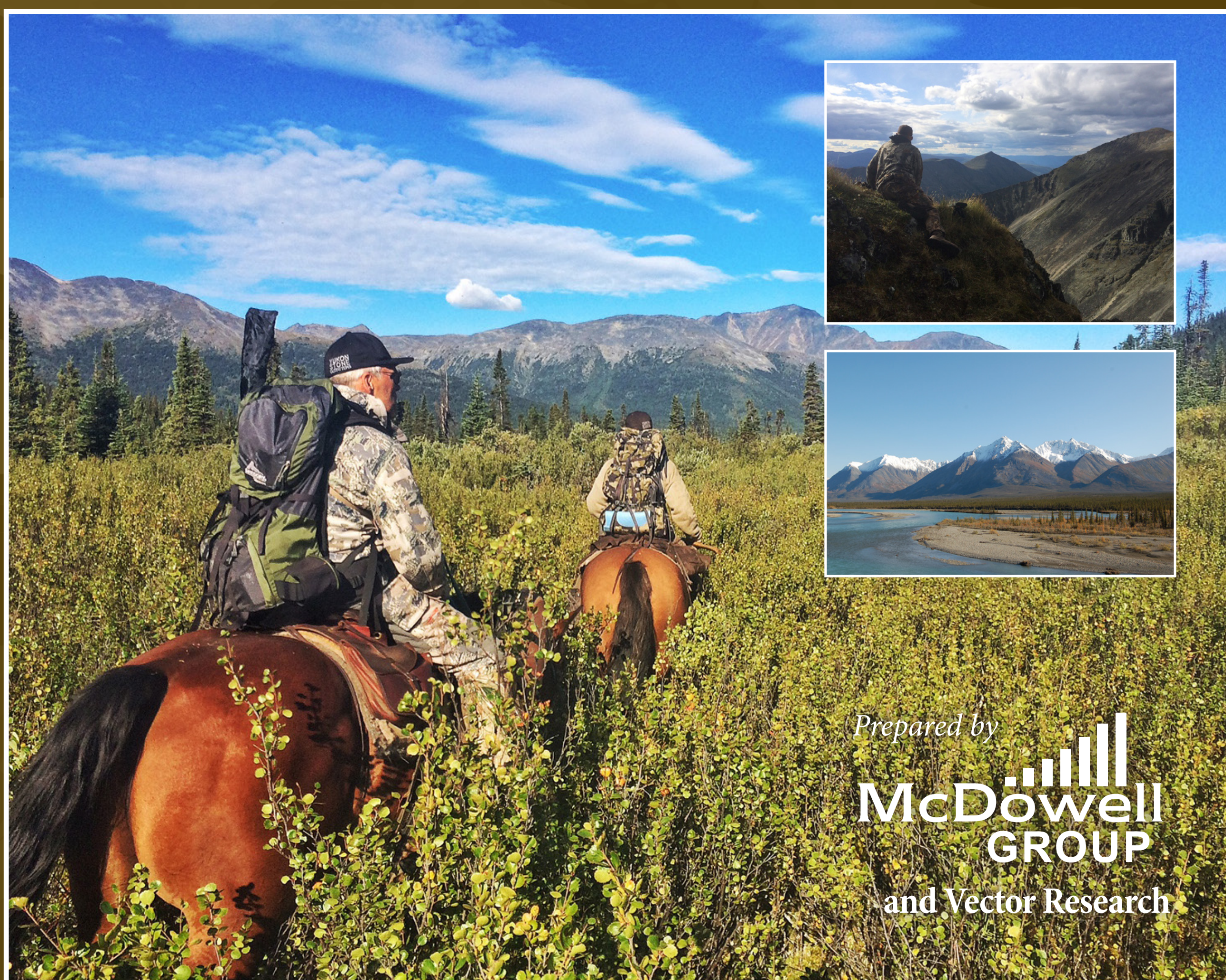
Yukon Outfitters
Socio-Economic Profile and Situational Analysis

April 2016

Prepared for
Yukon Government Economic Development Department



Prepared by
McDowell Group
and Vector Research

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Executive Summary

The business of outfitting has been a part of Yukon for more than 100 years, and while the industry is strong, it faces many challenges today. Outfitters provide opportunities for non-resident hunters and others to experience the remote Yukon backcountry. The purpose of this study is to present a picture of the social and economic contributions of the outfitting industry in Yukon. The study presents a profile of the industry, reviews the significant territory-wide economic impacts generated by the industry in 2014, and provides a situational analysis which identifies and reviews industry challenges. Following are the study's key findings.

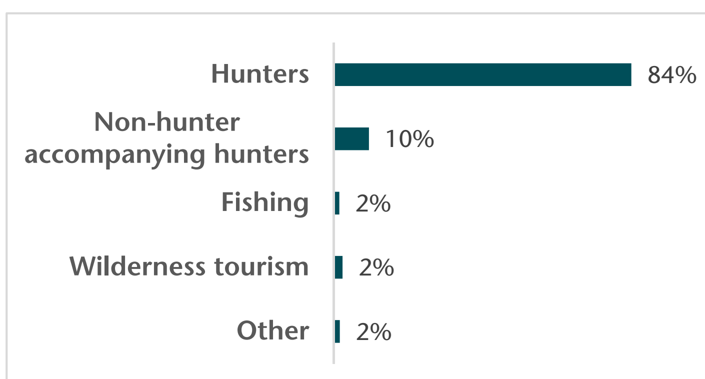
Outfitting is a business and a way of life.

- Ownership of an outfitting concession allows outfitters the opportunity to provide exclusive guiding services in that area. Concessions can be bought and sold to Canadian residents only. Outfitters do not own the land or animals, and are required to comply with strict regulations related to land use.
- Outfitters are experienced at what they do. Yukon concession holders average 31 years in the Canadian industry, with an average of 19 years as a Yukon outfitter. Many were introduced to it at a very early age through family and other connections, and worked their way up from staff to owner.
- Outfitting is typically a family business. Only two outfitters reported no family members working in their operations. The rest employed an average of 2.2 family members each.
- Outfitters love the outdoors and are good land stewards. They work hard to manage game populations and maintain pristine wilderness as these two factors are critical to their business success.
- Industry employment is mostly seasonal, but outfitters work nearly year-round managing their investments and business.

Hunters and their companions are the most important market for outfitters.

- The business of outfitting is predominately based on guided hunting. A total of 84 percent of clients booked guided hunts. An additional 10 percent booked as non-hunters accompanying hunters.
- Guided hunters and their guests generate 98 percent of industry revenues.
- The remaining 6 percent of clients and associated revenues come from guided fishing, wilderness tourism, and other activities.

Outfitter Clients by Primary Activity, 2014



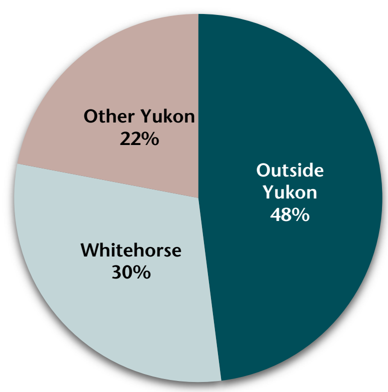
Outfitters commonly donate game meat and support non-profit organizations and other activities that benefit Yukon.

- Outfitters and clients donated nearly 150,000 pounds of high-quality game meat in 2014.
- Without these donations, recipients would have had to spend at least $1.2 million to buy an equivalent supply of beef, or get by with much less protein in family diets.
- Outfitters also support wildlife enhancement and conservation, outdoor organizations, local schools, charities, and other activities.

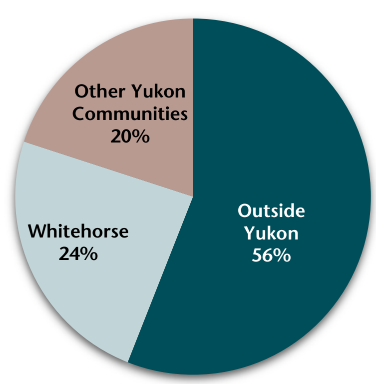
Outfitting employed 290 people with a total income of $2.8 million in 2014.

- The outfitting industry directly employed 290 people in 2014; over half (52 percent) are Yukon residents, including nearly one-quarter that live in remote communities outside of Whitehorse.
- Jobs are mostly seasonal with peak activity occurring from August to October.
- Yukon residents employed in the outfitting industry earned $2.8 million in compensation, tips, and owners' retained earnings.
- Yukon residents employed in the outfitting industry earned 44 percent of total industry compensation.
- One-fifth of all industry compensation is earned by residents of communities other than Whitehorse.

Distribution of Outfitter Industry Employment by Place of Residency, 2014



Distribution of Outfitting Industry Income by Place of Residence, 2014



In 2014, outfitters spent $4.1 million throughout Yukon on a variety of goods and services.

- The majority of outfitter spending occurred with Whitehorse-based businesses ($3.0 million).
- A significant amount of operational expenditures ($1.2 million) occurred with businesses in rural Yukon communities.

Table 1. Operational Expenditures for Goods and Services within Yukon, 2014

Category	Total Yukon	Whitehorse	Other Yukon Communities
Aircraft operations	$1,395,000	$942,000	$453,000
Fuel	$456,000	$254,000	$202,000
Supplies	$956,000	$724,000	$232,000
Food/Beverage	$396,000	$313,000	$83,000
Insurance	$100,000	$96,000	$4,000
Marketing	$64,000	$44,000	$20,000
All other	$756,000	$579,000	$177,000
Total	$4,123,000	$2,952,000	$1,171,000
% of Total Yukon spending	100%	72%	28%

Note: Figures have been rounded. Source: Yukon Outfitter Survey and McDowell Group estimates.

- In addition to operational expenditures, outfitters reported $436,600 in capital expenditures in Yukon, for facilities and land improvements, equipment (such as snowmobiles, Argos, and machinery), boats and motors, horses, trucks and other vehicles used in their operations.

Outfitter client pre- and post-trip expenditures support many small businesses in Yukon.

- A total of 643 outfitter clients spent $1.25 million in Yukon prior to and after their time in the field. These expenditures are in addition to payments made to outfitters for their trip.
- Client spending included a range of service and retail businesses, including taxidermy, air transportation, gifts and souvenirs, food and beverage, accommodations, and personal supplies.

- Outfitter clients spent on average, $1,944 each in the Yukon in addition to payments to the outfitter. Estimated per day expenditures were $865 (not including payments to outfitters). This is significantly higher than the average per day expenditure of $82 for summer 2012 Yukon visitors.[1]

Table 2. Outfitter Client Pre-and-Post Trip Expenditures, 2014

	Total Yukon	Whitehorse	Other Yukon Communities
Taxidermy & Handling	$405,000	$405,000	--
Air Transportation	$335,000	$235,000	$100,000
Gifts & Souvenirs	$155,000	$140,000	$15,000
Food & Beverage	$130,000	$117,000	$13,000
Accommodations	$125,000	$100,000	$25,000
Personal Supplies	$100,000	$90,000	$10,000
Total Spending	$1,247,000	$1,087,000	$163,000
% of Total Spending	100%	87%	13%

Note: Figures have been rounded. Source: Yukon Outfitter Survey and McDowell Group estimates.

The secondary economic impacts of the outfitting industry are significant.

- The total annual economic output of the Yukon outfitting industry was an estimated $11.8 million in 2014. This includes direct outfitter and client expenditures totaling $8.6 million, and indirect and induced impacts of $3.2 million.
- The industry generated direct Gross Domestic Product (GDP) of $4.6 million. Total GDP, including indirect and induced impacts, is $6.6 million.
- Direct industry compensation (including wages, tips, and owners' retained earnings) was $2.8 million. Total labour income, including $796,000 in indirect and induced impacts, was $3.6 million.

Table 3. Economic Effects of the Yukon Outfitting Industry within Yukon, 2014

	Direct	Indirect & Induced	Combined Total Impacts
Output	$8,583,000	$3,168,000	$11,751,000
Gross Domestic Product	$4,567,000	$2,024,000	$6,591,000
Labour Income	$2,773,000	$796,000	$3,569,000

Note: Figures have been rounded
Source: Vector Research and McDowell Group estimates.

[1] DataPath Systems. 2012/2013 Yukon Visitor Tracking Program: Summer Report. Prepared for Government of Yukon Department of Tourism and Culture.

Outfitters and their clients support Federal, Territorial and Municipal governments through a variety of taxes and fees.

- Yukon outfitters and their clients generated an estimated $1.2 million in Federal, Territorial, and Municipal taxes and fees, including Goods and Services Tax (GST), property, personal, and corporate taxes, concession fees, wilderness tourism fees, crown leases, vehicle taxes, hunting and fishing licenses, big game seals, and trophy fees.
- Most government revenue is spent in Yukon providing services to all Yukon residents.

The outfitting industry is recovering from the global recession, but faces a number of issues and challenges.

The situational analysis section of this study reviews industry issues and challenges raised by outfitters and others interviewed for this study.

CURRENT INDUSTRY CHALLENGES:

- Regulatory environment, including site tenure and game quotas
- Difficulties related to financing the purchase of a concession and renovation of assets
- The health of sheep populations
- A desire for increased predator management
- Resource development issues
- Unregulated use of Off Road Vehicles (ORVs)
- Reported abuse of special guide permits
- Increased hunting pressure as Yukon population grows and access to remote areas increases
- New regulations related to meat care and handling
- Industry public relations efforts within Yukon need improvement

Industry Outlook

- Yukon is one of the top hunting destinations world-wide.
- The industry is relatively stable, but does experience some annual fluctuation in the number of hunters. The most recent decline between the period of 2009 to 2011 was related to a weak U.S. and world economy.
- The volume of hunts sold has increased annually in the last four years and preliminary hunter counts for 2015 (588) are well above the long-term average.
- The condition of the U.S. economy is the most important factor in the volume of guided hunts sold by outfitters.
- Fluctuations in the U.S. dollar has a greater impact on the volume of hunters from other areas of Canada and worldwide.
- Significant game quota restrictions could seriously impact the volume of outfitter hunts and impact revenue and spending in Yukon.
- There is potential fall-out from recent and long-term anti-hunting issues.
- Wilderness tourism offers outfitters some potential for expanding revenue sources but will likely remain a minor portion of overall clients and revenue for the immediate future.

Introduction and Methodology

Introduction

The Yukon Government's Department of Economic Development contracted with McDowell Group and Vector Research to conduct a study of the social and economic contributions of the outfitting industry in Yukon. The study estimates employment, compensation, and spending on goods and services, as well as secondary impacts caused by outfitter-industry-related spending circulating through the Yukon economy.

This study is presented in three parts. First, a profile of the outfitting industry describes the industry including outfitters, staff, and clients. The second section details the impacts of the industry on Yukon's economy. Lastly, a situational analysis reviews issues and potential barriers to industry growth. Appendices with supporting information follow.

Methodology

Information for this study was gathered from three primary sources:

- Yukon Outfitter Survey
- Executive interviews
- Literature and secondary data review

Outfitter Survey

Extensive telephone surveys were conducted with outfitters representing 19 out of 20 Yukon concessions in June 2015. Lines of questioning included the number and type of clients, game hunted, seasons, staffing, detailed operational and capital expenditures by location, and 15 qualitative questions about the business and lifestyle of an outfitter, land stewardship, marketing, donations, and industry threats and barriers to growth. To create an accurate profile of the entire industry, estimates were developed for the one outfitter than did not participate in the survey by using averages based on data provided by other outfitters and McDowell Group estimates.

Interviews

About 35 executive interviews were conducted with business owners around Yukon, Yukon government representatives, land and wildlife managers, conservation officers, tourism representatives, regional resource council representatives (including First Nations representatives), leaders from community-based agencies, hunting clients, guided hunting brokers, hunting guides outside of Yukon, and wildlife organizations. The list of interviewees was compiled by McDowell Group and Vector Research with input from and review by Yukon Outfitters Association and the Yukon Department of Economic Development. Attempts were made to sample a variety of interviewees and locales. Quotes from these interviews are interspersed throughout the report to highlight key themes. A list of interviewees is included in Appendix A.

Literature and Secondary Data Review

A review of relevant literature and other data was conducted. A bibliography is included in Appendix B.

Data requests were made to the following:

ENVIRONMENT YUKON, FISH AND WILDLIFE BRANCH

- Non-resident hunter counts
- Non-resident hunting license sales by type and residence
- Non-resident seals purchased, by species
- Non-resident license harvest, by species
- Special guide license
- Special guide license harvest, by species
- Resident and non-resident trapping data

YUKON DEPARTMENT OF TOURISM AND CULTURE

- Outfitter use of tourism cooperative marketing funds

YUKON DEPARTMENT OF HEALTH AND SOCIAL SERVICES AND YUKON BUREAU OF STATISTICS

- Yukon population estimates

Currency

Guided hunt prices, per industry standards, are reported in U.S. dollars. All other figures in this study are Canadian dollars.

Profile of Yukon Outfitting Industry

The outfitting industry has existed in Yukon for more than a century. The business of outfitting is predominately based on guided hunting, which represents 94 percent of bookings and 98 percent of outfitter revenues. The remaining clients and revenues come from guided fishing and wilderness tourism (including a small amount of winter tourism).

Yukon is recognized around the world as a premier hunting destination with pristine wilderness and quality game. Yukon outfitters command a premium price over other destinations with similar game species. Limited concessions allow outfitters to offer exclusive opportunities to hunt high-quality game under wilderness conditions with minimal competition from other hunters. Yukon is recognized for its exceptional sheep, moose, and caribou hunting. Other primary game animals include bison, mountain goats, and grizzly bear. Secondary animals include black bear, wolf, and wolverine, which are most often harvested opportunistically rather than as a primary species target.

Following is an overview of the Yukon outfitting industry in 2014. Data were gathered from a survey of Yukon outfitters, Yukon government, and other sources.

Outfitting as a Business and Way of Life

Outfitting concessions in Yukon are regulated under the Yukon Wildlife Act, stating:

> *"An outfitting concession reserves from all persons other than the holder of the outfitting concession, the exclusive opportunity, in accordance with this Act, to provide guides to persons for hunting big game animals in the outfitting concession area."*[2]

Non-resident big game hunters are required to hire a guide to hunt in Yukon. Concession boundaries were first established through a 1958 agreement between outfitters. Boundaries have changed somewhat since that time and guided hunting is not allowed in all areas of Yukon. Currently, 20 concessions operate in the Territory, as shown in the map to the right.[3] Concession numbers are not consecutive as some concessions are no longer active. Nineteen outfitters are members of Yukon Outfitters Association (YOA), a trade organization that represents Yukon's outfitting industry.

Yukon Outfitting Concessions

[2] (S.Y. 2001, c.25, s.53).
[3] Map source: Geomatics Yukon, GeoYukon Viewer

Outfitting Concession Holders

Outfitters state they love the outdoors and are connected to their concessions. They indicate they work hard to manage game populations and maintain pristine wilderness as these two factors are critical to their business success.

Yukon concession holders average 31 years in the outfitting industry (with an average of 19 years as a Yukon outfitter). Many were introduced to the industry at an early age through family and other connections, and worked their way up from staff to owner. Some concessions are passed through generations, but they can also be sold to other Canadian residents. More than half of outfitters are Yukon residents; nine live in Whitehorse and two live elsewhere in Yukon.

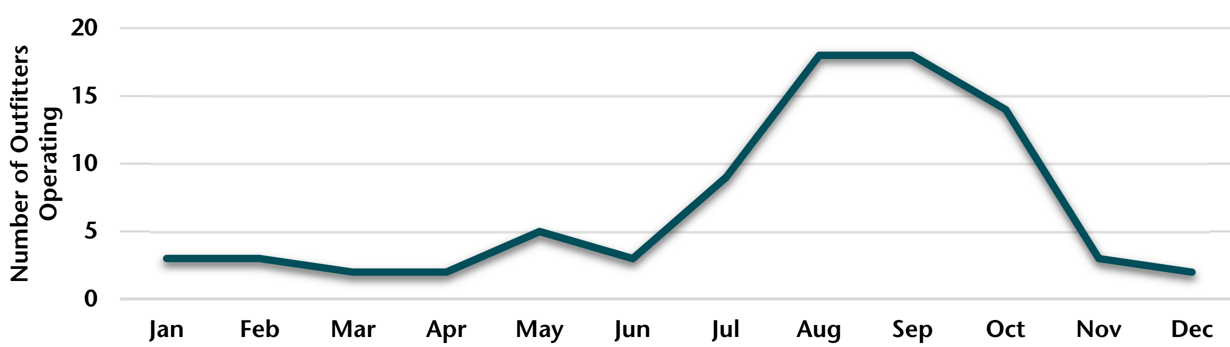
Seasonality

Guided big game hunting in Yukon is seasonal, determined by hunting regulations and environmental conditions. The figure below outlines the months in which outfitters are operating in the field. Peak hunting activity occurs in August through October. June and July activities are generally related to repairs and maintenance of outfitting assets, as well as pre-season scouting for game, though a few outfitters host clients for wilderness tourism or fishing trips before the peak hunting season.

Outfitter activity is lower in winter months, though a few bison hunts are offered, as well as a small number of winter tourism activities. In May and June, several outfitters offer spring hunts for bear.

(see chart next page)

Outfitter Operations, Activity by Month, 2014



Source: Yukon Outfitter Survey.

Staffing

Outfitters employ guides, assistant guides, wranglers, cooks, camp helpers, pilots, and expeditors to directly service clients. Outfitters, guides, and assistant guides are required to be licensed by Yukon government to guide hunters. There are two levels of guides; chief guides and guides. The only difference is that chief guides are required to be certified in first aid. Wranglers primarily tend to horses and provide general camp labor but are not licensed to guide hunters. Each hunter must be accompanied by a guide and guides must be within unamplified communication distance while a client is hunting.

All outfitters reported guiding clients themselves; however, some spend more time with clients than others. Two-thirds of outfitters are pilots and operate their own aircraft, which allows flexibility in moving staff, materials, and clients into and out of the field. Depending on the size of the operation and other factors, some outfitters personally take more responsibility for managing logistics rather than solely guiding. Many outfitters, even those that operate their own aircraft, require their clients to charter flights to and from Whitehorse to the starting point of their trip.

Outfitter employment is mostly part-time and seasonal, though outfitters, family members, and a handful of key staff work year-round on marketing, maintenance, and other tasks.

Additional details concerning the number of key positions, average number of days worked, and residency by position is presented in this report's section on the economic impact of the industry.

Family Business

Sixteen outfitters reported that they employed 39 family members in their operations for an average of 2.2 family members each (in addition to the outfitter). Only two out of 19 outfitters reported no family members working in the business. Outfitters reported they work in an industry they love and sharing this industry with family members is richly rewarding.

Physical Assets

Outfitters own a wide variety of fixed assets and other equipment employed in their operations. All outfitters own cabins, which are used for staging clients and gear near prime hunting areas. The majority of outfitters also own other buildings, watercraft, horses, aircraft, ATVs, Argos, and snow machines. Half of outfitters reported operating a lodge. Table 5 shows the prevalence of each type of asset among Yukon outfitters.

Table 4. Outfitter Physical Assets by Type, 2014

Type of Asset	# of Outfitters	% of Outfitters
Cabins	18	100
Other buildings	15	83
Watercraft	15	83
Horses	15	83
Aircraft	12	67
ATV/Argo	11	61
Snow machines	11	61
Lodges	9	50

Source: Yukon Outfitter Survey.

Clientele

Clients by Type Activity

Outfitters reported hosting 643 clients in 2014 (an average of 32 clients per concession). Table 6 shows the vast majority of clients were hunters or non-hunting companions (94 percent); revenue from these clients represents 98 percent of all outfitter revenues. Activities such as guided fishing (2 percent), wilderness tourism (2 percent), and other activities – such as film crews – constitute a minor portion of the outfitting business.

Outfitters estimated about 10 percent of their clients are highly affluent individuals. Three-quarters of clients are professionals such as doctors, lawyers, executives, and business owners. The remaining 15 percent are individuals who save for a once in a lifetime trip, many of whom make monthly payments to outfitters for years prior to their hunt.

Table 5. Yukon Outfitter Clients, by Activity Type, 2014

	# of Clients	% of Total
Hunters	542	84%
Non-hunter accompanying hunters	64	10%
Fishing	10	2%
Wilderness tourism	16	2%
Other	11	2%
Total	643	100%

Source: Yukon Outfitter Survey. One outfitter did not participate in the survey. An estimate was made for the number of hunters for that outfitter.

Trends in Non-Resident Big Game Hunting in Yukon

Non-Resident Big Game License Sales by Residence

As shown in Table 7 below, the Yukon Government Fish and Wildlife Branch reports selling 579 non-resident big game hunting licenses in 2014. By far, the U.S. is the most important market for Yukon outfitters, representing 72 percent of big game license sales. Non-Yukon Resident Canadians (referred to as non-resident Canadians) accounted for 18 percent of license purchases and non-residents from countries other than the U.S., purchased 9 percent of licenses.

License sales data include guided hunters that actually made it into the field (542 in 2014), as well as a small number of licenses purchased by non-resident guides (in case they had the opportunity to hunt after their guiding season) and guided hunters who ended up cancelling their hunts.

Table 6. Non-Resident Big Game Hunter License Sales, by Origin, 2014

Hunter Origin	2014	% of Market
U.S. Residents	419	72%
Non-Yukon resident Canadian	105	18%
Other International Residents (Non-resident Alien)	55	9%
Total Sales	579	100%

Note: Based to non-resident license sales. Figures have been rounded and may not add to 100 percent.
Source: Yukon Government Fish and Wildlife Branch.

Total non-resident big game hunting license sales in Yukon declined 5 percent over the last ten-year period from 612 in 2005 to 579 in 2014. Sales in 2014 were above the ten-year average of 558 licenses sold.

License sales to U.S. residents declined by 33 percent from 472 in 2005 to 316 in 2011. The U.S. recession contributed to a steep drop in license sales to U.S. residents starting in 2009. License sales to U.S. hunters in 2014 increased to 419, slightly above the ten-year average, but still down 11 percent from 2005. Non-resident Canadian sales increased 83 percent from 57 in 2005 to 105 in 2014. All Yukon hunts are priced in U.S. dollars. When the U.S. and Canadian currencies were roughly equivalent – the period between 2011 and 2014 – it was more affordable for non-resident Canadians to book an outfitted hunt in Yukon.

The number of license holders that actually hunted decreased by 10 percent from 599 in 2005 to 542 in 2014. The number of hunters in 2014 was just slightly above the decade average of 537.

Table 7. Non-Resident Big Game Hunter License Sales, and Hunted Licenses, by Origin, 2005-2014

Hunter Origin	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	% change 2005-14	10 year Avg.
U.S. Residents	472	469	461	449	380	356	316	341	392	419	-11%	406
Other International Residents	83	62	66	70	78	74	70	72	64	55	-34%	69
Non-Yukon resident Canadian	57	55	83	91	98	69	83	76	110	105	84%	83
Total Sales	612	586	610	610	556	499	469	489	566	579	-5%	558
Hunted Licenses	599	569	589	595	541	482	447	464	541	542	-10%	537

Source: Yukon Government, Fish and Wildlife Branch. Based to non-resident license sales. The number of licenses sold is higher than the actual number of non-residents that hunted.

Other Non-Canadian Resident Licenses Sold by Country of Residence

Although non-resident hunters from countries other than the US only represent one out of ten licenses purchased by hunters, these other countries are an important component of outfitting industry markets.

Countries which have served as relatively consistent sources of hunters include Germany, Mexico, and Austria, each averaging about 10 hunters purchasing licenses each year over the last decade. Other important markets include Spain, Denmark, Norway, Sweden, Hungary, Switzerland, Australia, Italy, New Zealand, and Russia.

Appendix C includes a table of the last decade of non-resident license sales, by country of residence, and shows the relative importance of a variety of countries and regions and how sales from those areas change over time.

Seals Purchased

A seal must be purchased prior to hunting for a particular species. The sale of non-resident big game seals increased by 11 percent from 2,125 in 2005 to 2,366 in 2014. The cost of purchasing seals is considered minimal by most outfitters and many purchase all available seals for their clients regardless if they are scheduled to hunt that animal. The cost of seals ranges from $5 to $50. A table of seal fees by species in included in Appendix A. A table of non-resident seals sold for the period 2005 to 2014 is included in Appendix D.

Table 8. Non-Resident Seals Sold, by Species, and Harvest, 2014

	Species							
	Moose	Caribou	Sheep	Goat	Grizzly	Black Bear	Bison	Total Seals Sold
2014 Seals Sold	538	517	365	17	489	432	8	2,366
2014 Harvest	214	96	140	12	41	8	7	

Source: Yukon Government, Fish and Wildlife Branch

Concurrent with increasing seal purchases, the number of non-resident licenses sold for the period declined by 6 percent from 613 (2005) to 579 (2014). This resulted in an increase in the average number of seals sold per license from 3.5 per license in 2005 to 4.1 in 2014.

Non-resident Big Game Harvest Average

Average harvest per non-resident hunter has been stable over the last decade averaging about one big-game animal per hunter.

Table 9. Non-Resident Average Big-Game Harvest Per Hunter, 2005-2014

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total Animals Harvested	623	602	564	573	551	518	495	462	525	518
Hunters	599	569	589	595	541	482	447	464	541	542
Avg. Harvest per Hunter	1.04	1.06	0.96	0.96	1.02	1.07	1.11	1.00	0.97	0.96

Source: Yukon Government, Fish and Wildlife Branch. Includes moose, sheep, caribou, mountain goat, Grizzly, black bear and bison.

Non-resident Harvest By Species

The 2014 harvest of grizzly bears, mountain goat, and bison was above average for the ten-year period while harvest of moose, sheep, and caribou were below average. A table of non-resident harvest for the period 2005 to 2014 is included in Appendix C.

Table 10. Non-resident Harvest by Species, 2014, and Avg. 2005 to 2014

	Moose	Caribou	Sheep	Grizzly Bear	Mtn. Goat	Black Bear	Bison
2014 Harvest	214	96	140	41	12	8	7
Avg. Annual Harvest 2005-2014	225	117	151	38	4	8	3

Source: Yukon Government, Fish and Wildlife Branch.

Outfitters and the Visitor Industry

Outfitting is part of a much larger Yukon visitor industry that attracts nearly 300,000 summer visitors to Yukon between June and September.[4] Visitor industry operators and government officials interviewed indicated that the current state of relations between the outfitting industry, wilderness tourism operators, and other visitor industry business is generally good. Tourism Yukon reported that they support outfitters as an important part of Yukon's visitor industry and welcome outfitter marketing efforts.

Government Support

Outfitters receive supplemental funding for trade show attendance and other marketing activities from Yukon Government through the Yukon Tourism Cooperative Marketing Fund (TCMF). Yukon Tourism and Culture reports that outfitters have increased their use of TCMF funds for marketing activities from $28,000 in 2011 to $114,000 in 2014 (a 300 percent increase). Total expenditures for the TCMF program if FY 2014 were $705,000.

Table 11. Yukon Tourism Cooperative Marketing Fund

Year	Amount
2011	$28,000
2012	$40,000
2013	$97,000
2014	$114,000
2011-2014 Total	$279,000

Source: Yukon Tourism and Culture

Several outfitters mentioned they appreciated the recent trade show attendance by a minister and deputy minister. They felt it was important for a government representative to observe how Yukon outfitters fit in the global arena of big game guiding. This show of government support for their industry was viewed very positively by outfitters.

Outfitter Industry Pricing and Marketing

Pricing

Guided big game hunts in Yukon range from about US$10,000 for a barren ground caribou hunt to sheep hunts that cost US$40,000 or more. Based on outfitter survey data, the average guided hunter paid about

[4] 2012/2013 Yukon Visitor Tracking Program. Summer Report. Yukon Department of Tourism and Culture.

US$20,000 for their hunt (including most fees) plus tax. Hunters that book through a broker may also pay an additional broker's fee. Fishing packages and wilderness tourism packages are generally less expensive than guided hunts. The cost of operating an outfitting concession in the Far North is substantial and requires outfitters to price their products accordingly. A full year's revenues must, for the most part, be generated during the short hunting seasons, and outfitters incur significant expenses for transportation and support of remote wilderness operations as well as marketing and other year-round operational expenditures. A more detailed look at outfitter expenditures is included in the next section.

Industry Marketing

In addition to a strong word-of-mouth network among hunters, outfitter marketing occurs through an array of trade shows, online, and television hunting shows to reach a wide audience and build awareness among potential customers.

Another significant activity that generates awareness of hunting in Yukon are donations to hunting and other organizations. In 2014, outfitters donated more than $200,000 in guided hunts to organizations like Safari Club International, Wild Sheep Foundation, National Rifle Association, and Wounded Warriors. These high profile auctions help raise awareness of guided hunting in Yukon.

Nearly all outfitters mentioned they felt current industry marketing efforts are effective. Many of the older, well-established outfitters said they have just about as much business as they want and because of demand, regularly book clients one to two years in advance. Many outfitters rely heavily on repeat clients and word of mouth recommendations for new business. Some outfitters (especially those with newer operations) are still in the process of establishing themselves and engage more actively in marketing their services.

Outdoor Television

Some outfitters rely heavily on outdoor television shows for their marketing. The outdoor television industry is large and reaches a significant number of hunters around the world. Yukon has incredible scenery and high-quality hunts that have the ability to generate a high level of interest.

Guided hunting is not an easy endeavor and the addition of a film crew significantly complicates outfitters' efforts. However, if successful, the broadcast of a high-quality hunt via a well-produced show can be a highly effective marketing tool. The following statements were made by the host of a popular hunting show when interviewed about the significance of Yukon to his business:

> *To be successful in my industry, you have to have a highly rated program to sell ads. You need quality animals, good film, and good production, to make it work. To have a successful show, you have to go to the great places to hunt. Yukon is one of the top destinations for us. Yukon is the last frontier of top-quality big game hunting in North America.*
>
> *If we have high success rates and great shows, viewers notice. Many hunters have their wish list of hunts and usually moose, sheep, bear, and mountain caribou are on it. If they watch our shows, that drives their interest often to action and booking a hunt. Our show is a great marketing tool for our Yukon outfitter and the industry.*

Industry Ethics

Outfitters are viewed as hard-working and ethical business people who try to do the right thing. While there are occasional wildlife infractions, the relationship between law enforcement and the outfitters is cooperative. Conservation officers hold pre-season meetings with all the outfitters to review new regulations and go over any issues. During the season they conduct field checks and fly-in inspections at remote camps. An officer interviewed for this study stated:

> *We write a handful of tickets each year and have an occasional major infraction, such as poor meat care, but on the whole, outfitter compliance with the regulations is good. The industry understands conservation and wants to display best practices. They have a vested interest in making sure nothing bad happens in their camps. Doing things right helps build political good will. We have been working with outfitters to develop a best practices handbook.*

Economic Impacts of Outfitters

The outfitting industry's economic contribution to Yukon's economy includes direct, indirect and induced impacts. Direct impacts include outfitter and client expenditures for goods and services in the Yukon.

Outfitter Related Revenue and Expenditures

Outfitter Total Revenue and Industry-Related Expenditures in Yukon

Yukon outfitters reported total revenues of slightly more than $11.2 million in 2014. This revenue does not include income from other activities such as farming, trapping, or other employment. As previously mentioned, 98 percent of outfitter revenue is generated from guided hunters and non-hunting companions.

Two-thirds of 2014 total outfitter revenue ($7.3 million) was distributed within Yukon, including $2.8 million in industry compensation (payroll, tips, and outfitters' net profits), $4.1 million in outfitter spending on goods and services, and $437,000 in outfitter capital expenditures.

In addition, outfitter clients spent $1.25 million in Yukon prior to and following their hunt on a variety of goods and services.

Of the total $8.6 million in outfitter industry-related expenditures in Yukon, 70 percent occurred in Whitehorse ($6.0 million) and 30 percent in other Yukon communities ($2.6 million).

Table 12. Summary of Outfitter Related Expenditures in Yukon, 2014

Type of Expenditure	Whitehorse	Other Yukon Communities	Total Yukon
Compensation	$1,525,000	$1,248,000	$2,773,000
Goods and Services	$2,952,000	$1,170,000	$4,122,000
Capital Spending	$400,000	$36,000	$436,000
Client Spending	$1,084,000	$163,000	$1,247,000
Total	$5,961,000	$2,617,000	$8,578,000
% of Total	70%	30%	

Note: Figures have been rounded.
Source: Yukon Outfitter Survey and McDowell Group estimates.

Operational Spending on Goods and Services

Outfitters spend money on a wide variety of goods and services, including transportation (aircraft, boats, ATVs, other vehicles, and fuel), groceries, and a variety of outdoor equipment and gear. The survey of Yukon outfitters indicates expenditures of this nature totaled $4.1 million in Yukon in 2014.

The most significant expenditures were for aircraft operations at $1.4 million, including outfitter-owned aircraft as well as commercial flights. Additionally, a significant portion of fuel expenditures ($456,000) were for aviation fuel. Expenditures for supplies totaled nearly $1 million, and food and beverage expenses neared $400,000. A total of 72 percent ($2.6 million) was spent on goods and services purchased from Whitehorse based businesses, with the remaining 28 percent ($1.2 million) was spent with businesses in other Yukon communities.

Table 13. Operational Expenditures for Goods and Services, 2014

Category	Total Yukon	Whitehorse	Other Yukon Communities
Aircraft operations	$1,395,000	$942,000	$453,000
Fuel	$456,000	$254,000	$202,000
Supplies	$956,000	$724,000	$232,000
Food/Beverage	$396,000	$313,000	$83,000
Insurance	$100,000	$96,000	$4,000
Marketing	$64,000	$44,000	$20,000
All other	$756,000	$579,000	$177,000
Total	$4,123,000	$2,952,000	$1,171,000
% of Total Yukon spending	100%	72%	28%

Note: Figures have been rounded.
Source: Yukon Outfitter Survey and McDowell Group estimates.

Outfitter Capital Expenditures

In 2014, outfitters reported spending $436,700 in Yukon on capital investments in support of their operations. Capital expenditures included:

- $176,600 for improvements to facilities and land;
- $139,200 for equipment such as snow machines, Argos, and machinery;
- $89,000 for the purchase of boats and motors;
- $16,900 for horses; and
- $15,000 for trucks and other vehicles.

Nearly all capital expenditures (92 percent) occurred in Whitehorse, which is the primary supply hub in Yukon.

Outfitters were asked if their 2014 capital spending was more, less or about the same as in recent years. There was an equal split with one-third each stating more, less, and about the same.

Table 14. Outfitter Capital Expenditures, 2014

Category	Total Yukon	Whitehorse	Other Yukon Communities
Land/facility improvements	$176,600	$150,000	$26,600
Equipment	$139,200	$139,200	$0
Boats & motors	$89,000	$82,300	$6,800
Horses	$16,900	$13,900	$3,000
Vehicles	$15,000	$15,000	$0
Total	$436,700	$400,400	$36,400
% of Total Yukon Spending	100%	92%	8%

Source: Yukon Outfitter Survey and McDowell Group estimates. Figures have been rounded.

Yukon Outfitting Industry Employment and Compensation

Staffing

Outfitters provided direct employment for 290 individuals in Yukon in 2014. The vast majority of industry jobs are seasonal, with the exception of outfitters, family members, and a handful of year-round staff. Peak seasonal employment is August through early October. About half of all staff (52 percent), including outfitters, are Yukon residents. Thirty percent of all outfitter staff live in Whitehorse and 22 percent in other Yukon communities.

Table 15. Yukon Outfitters and their Employees, by Position, Area of Residence, and Days Worked, 2014

Position	Outside Residents	Whitehorse Residents	Other Yukon Residents	Total Individuals	Avg. Days Worked
Outfitters	9	9	2	20	315
Guides	89	32	30	151	70
Assistant guides/wranglers	28	9	13	50	80
Cooks	3	5	9	17	65
Other	11	31	10	52	60
Total	139	86	64	290	
% of Total positions	48%	30%	22%		

Source: Yukon Outfitter Survey and McDowell Group estimates.

Outfitters

Outfitters reported they work at their outfitting business, on average, 315 days a year. However, nearly all of them reported they engaged in client communications and other marketing support activities more or less year-round. More than half (55 percent) of outfitters are Yukon residents, with nine living in Whitehorse and two living in other Yukon communities.

GUIDES

There were a total of 151 guides in 2014, working an average of 70 days. Two out of five guides (41 percent) were Yukon residents, with 32 living in Whitehorse and 30 in other Yukon communities.

ASSISTANT GUIDES/WRANGLERS

A total of 50 assistant guides and wranglers worked an average of 80 days in 2014; 22 are Yukon residents, with nine living in Whitehorse and 13 in other Yukon communities.

COOKS

Seventeen cooks worked 65 days on average. Four out of five cooks were Yukon residents. Yukon residents were split about evenly with 31 living in Whitehorse and 29 in other Yukon communities.

OTHERS EMPLOYMENT

Other employment included expediters, accountants, marketers, pilots, maintenance personnel, and general laborers. Outfitters reported employment of 52 other individuals in 2014. Other employment in support of their outfitting operations ranged from a few days to 300 days with an average of about 60 days.

Four out of five other positons (79 percent) were filled by Yukon residents, with 31 living in Whitehorse and 10 living in other Yukon communities.

FIRST NATIONS EMPLOYMENT

Half of the outfitters said they employed First Nations staff, with a total of 26 First Nations staff employed in 2014. This represented about one out of ten industry jobs in 2014. Outfitters said they look for opportunities to hire First Nations staff for their outdoor skills and local knowledge.

Outfitting Industry Compensation

According to outfitters surveyed, compensation for workers in Yukon's outfitting industry totaled $6.4 million in 2014. Total compensation includes payroll, tips, and outfitters retained earnings.

A total of 44 percent of total compensation was paid to Yukon residents. Of the Yukon compensation, 55 percent went to Whitehorse residents and 45 percent went to residents of other Yukon communities.

It is important to note that non-Yukon residents working in the industry live in Yukon for anywhere from 30 days to 6 months per year. During this time, they spend a portion of their compensation on living expenses and other personal goods and services in Yukon. As a result, the actual dollar amount of total compensation that moves through Yukon's economy is higher than $2.8 million.

(see table next page)

Table 16. Total Compensation by Residency, 2014

	Compensation	% of Total
Outside	$3,590,000	56%
Whitehorse	$1,525,000	24%
Other Yukon	$1,248,000	20%
Total Compensation	$6,363,000	
Yukon Resident Compensation		
Whitehorse	$1,525,000	55%
Other Yukon Communities	$1,248,000	45%
Total Yukon Compensation	$2,773,000	

Source: Yukon Outfitter Survey and McDowell Group estimates.

Outfitter Impacts in Yukon's Business Community

OUTFITTING IS A PRIMARY INDUSTRY

Yukon outfitters conduct business with hundreds of suppliers of goods and services all across Yukon. Outfitters were asked to detail their Yukon expenditures for goods, services, and capital expenditures and to identify businesses they frequented. A series of interviews were conducted with suppliers to better understand the importance of the outfitting industry to the Yukon economy. Suppliers represented a cross-section of business types, including accommodations, air charters, butchers, wholesale food distribution, feed sales, fuel distribution, taxidermy, and a retail gift shop. A significant amount of Yukon outfitter spending reaches the smallest Yukon communities. These dollars are particularly important as any influx of new dollars helps these communities survive economically.

Similar to timber and mining, the outfitting industry is a primary industry and an important source of new dollars for Yukon. Peak outfitter activity takes place in the months of August, September, and October, when most clients are in the field, but many of the outfitters spend money with local businesses year-round. Slightly more than half of Yukon outfitters live in the Territory. Beyond business expenditures, these outfitters spend money earned through outfitting on maintenance of their homes and properties, entertainment, and other typical household expenditures year-round.

While peak outfitter employment occurs during the period clients are present, a number of staff work before and after the peak season and a few work full-time, year-round. Outfitters and their staff that live in Yukon year-round spend more annually than non-resident staff. However, non-resident seasonal spending is also an important revenue source for local businesses.

Suppliers reported that outfitting operations are highly complementary with their business cycle, especially September and October activity which occurs at a time of year when summer tourism has begun to slow down significantly. For many suppliers, the outfitters seasonal business is an important source of revenue that helps maintain their operations year-round. Unlike other industries such as mining, Yukon outfitter expenditures are relatively steady year after year. Even for suppliers who receive a relatively small share of outfitter business, the year-after-year nature of the business is appreciated.

HORSES

Horses are a big part of Yukon's hunting experience. Four out of five outfitters (83 percent) use horses in their operations, and their clients enjoy the rustic, old West appeal of travelling by horseback. Use of horses also creates jobs. They need to be fed and cared for, and tack and other gear must be purchased. Some outfitters winter their horses in Yukon, though many are taken outside. Several outfitters farm hay to feed their stock and sell excess hay to non-outfitter residents that own livestock. If not for these outfitters growing hay, the cost of purchasing hay would likely be higher for other Yukon residents.

Following are selected comments from business owners on the importance of outfitter expenditures.

> *There are hundreds of people in the bush that need to be supplied in the fall. We ship out people, food, ATVs, snow machines, parts, boats, and motors all the time.*
>
> *Outfitters are active during times of the year when nobody else is coming to visit.*
>
> *Outfitters are about 30 percent of our business overall and about 90 percent in September.*
>
> *Nearly all of my annual income is from the outfitting industry. It allows me to stay in business year-round.*
>
> *Outfitting is not a huge part of our business, but everything helps. We get by on bits and pieces of business out here.*
>
> *Outfitters are an anchor client. Their business helps keep my guys employed year-round.*
>
> *Spending by outfitters is steady year after year. Not boom and bust like mining.*
>
> *We would be a lot leaner in September and October without hunters.*
>
> *Outfitters bring their clients into our store. They like to buy locally made gifts and jewelry.*

Client Spending

Another important outfitter-related source of revenue for local businesses is expenditures by clients prior to and after their hunt.

A total of 643 outfitter clients spent an estimated $1.25 million in Yukon in 2014 (in addition to direct payments to the outfitters for their trip). Top expenditures included $405,000 for taxidermy and handling, followed by $335,000 for air transportation.

Table 17. Pre-and-Post Trip Expenditures by Outfitting Clients in Yukon, 2014

	Total Yukon	Whitehorse	Other Communities
Taxidermy & Handling	$405,000	$405,000	-
Air Transportation	$335,000	$235,000	$100,000
Gifts & Souvenirs	$155,000	$140,000	$15,000
Food & Beverage	$130,000	$117,000	$13,000
Accommodations	$125,000	$100,000	$25,000
Personal Supplies	$100,000	$90,000	$10,000
Total Spending	$1,250,000	$1,087,000	$163,000
% of Total Spending	100%	87%	13%

Note: Figures have been rounded. Source: Yukon Outfitter Survey and McDowell Group estimates.

Most client spending took place in Whitehorse ($1.1 million). Spending in other Yukon communities is estimated at $163,000. The most significant expenditures were air transportation to and from Whitehorse to remote communities in or near the outfitters concession where they began their trip. Client air transportation expenditures do not include tickets purchased for jet travel to Whitehorse, though an unknown portion of those tickets sales impacts Yukon's economy through airline payroll and expenditures for goods and services.

Outfitter clients spent on average, $1,944 each in the Yukon in addition to payments to the outfitter. Estimated per day expenditures were $865 (not including payments to outfitters). This is significantly higher than the average per day expenditure of $82 for summer 2012 Yukon visitors.[5]

Multiplier Effects of Outfitting in Yukon

In addition to direct expenditures and employment, indirect and induced impacts result from spending by the outfitters, their staff, and clients. To quantify these additional impacts, multiplier analysis was performed using input/output multipliers for Yukon published by Statistics Canada. The indirect and induced impacts of the outfitting Industry within Yukon have been estimated for four different economic aspects: output, Gross Domestic Product (GDP), full-time equivalent employment, and labour income. The results of the multiplier analysis are presented in table 19.

- Direct impacts include outfitter and client expenditures for goods and services in the Yukon. Outfitters provided expenditure data and estimates for additional client spending while in Yukon. Indirect and induced impacts are defined as:
- Indirect impacts arise from the associated changes in activity experienced by businesses that supply goods and services to businesses where outfitters and their clients make purchases.
- Induced impacts measure the changes in the production of goods and services in response to the spending of wages generated by the direct and indirect production of goods and services.

The most recent input/output (I/O) multipliers published by Statistics Canada were applied to direct outfitter and client expenditures to estimate the indirect and induced impacts. Statistics Canada's I/O multipliers are derived from the system of national economic accounts for Canada.

[5] DataPath Systems. 2012/2013 Yukon Visitor Tracking Program: Summer Report. Prepared for Government of Yukon Department of Tourism and Culture.

Outfitter expenditures were categorized by food and beverage, fuel, supplies, aircraft operations, insurance, marketing, and other expenses. Client spending was categorized by taxidermy and handling, air transportation, gifts and souvenirs, food and beverage, accommodations, and personal supplies. Multipliers specific to each of the categories were applied to the corresponding outfitter spending estimates.

Table 18. Direct, Indirect and Induced Economic Impacts of the Yukon Outfitting Industry within Yukon, 2014

	Direct	Indirect & Induced	Combined Total Impacts
Output (outfitter and client expenditures)	$8,583,000	$3,168,000	$11,751,000
Gross Domestic Product	$4,567,000	$2,024,000	$6,591,000
Labour Income	$2,773,000	$796,000	$3,569,000
Employment (Full-Time Equivalent)	75	16	91

- Direct expenditures by outfitters and their clients (output) totaled $8.6 million in 2014. Economic output is the total dollar value of outfitting-related expenditures in Yukon including goods and services expenditures by Yukon outfitters, owner and employee compensation, as well as additional purchases made by outfitting clients. With indirect and induced effects added in, total estimated output of Yukon's outfitting industry is valued at $11.8 million in 2014.

- In terms of Gross Domestic Product (GDP), the direct impacts on Yukon GDP from expenditures in Yukon's outfitting industry in 2014 totaled $4.6 million. GDP is the incremental value created in Yukon's economy through the sale of outfitting related services in Yukon. With indirect and induced impacts added in, the total impact on Yukon GDP was $6.6 million in 2014.

- Direct labour income associated with outfitter industry employment for Yukon residents was estimated at $2.8 million. Total labour income including direct, indirect, and induced employment was $3.6 million.

- Statistics Canada multipliers can also be used to estimate the level of full-time equivalent (FTE) employment associated with a given level of industry spending. Total direct employment corresponding to Yukon outfitters and client spending in 2014 was estimated at 75 FTEs (this the full-time equivalent of the 289 people employed mostly seasonally in the industry). An additional 16 FTEs of indirect and induced employment were generated for a total estimated 91 outfitter industry FTEs.

Outfitting Industry Related Taxes, Licenses, and Fees

The Yukon outfitting industry also brings a significant amount of revenue in the form of Goods and Services Tax (GST), federal and territorial income taxes, property taxes, crown leases, and various fees, including those related to vehicle licenses, guide licenses, hunting licenses, big game seals, and trophy fees. Some fees are paid by the outfitters and some are paid directly by clients. The majority of this revenue is spent in the Territory through services provided by the government to all Yukon residents. In total, Yukon outfitters and their clients paid an estimated $1,243,000 in federal, territorial, and municipal taxes and fees in 2014. These government revenues are highlighted below.

Estimated Outfitter Taxes and Fees

- $556,000 in GST (generated by total revenues of $11.1 million)
- $370,000 in federal and territorial taxes and fees, including personal and corporate taxes, property taxes, crown leases, concession fees, wilderness tourism fees, and vehicle license fees paid by outfitters
- $7,500 in outfitter/guide license fees, including those required for guided hunting, fishing, and trapping

Estimated Client Taxes and Fees

- $80,000 in client hunting license fees
- $16,000 in client fishing license fees.
- $24,000 worth of big game seals purchased by clients
- $115,000 in harvest fees paid by clients
- $62,000 in GST from additional client spending of $1.25 million for goods and services
- $12,000 in GST generated by $235,000 spent on license, seals, and harvest fees

Other Impacts

Meat Sharing with Yukon Residents

Meat sharing by outfitters is a long-standing tradition in Yukon and part of the cultural fabric of the Territory. Donated meat plays an especially important role in remote communities where the cost of living is high and in First Nations cultures that place an emphasis on wild food.

The selling of wild game meat has been prohibited in Yukon since 1951, and the Yukon *Wildlife Act* clearly states that all big game meat must be consumed, with severe penalties for noncompliance. An estimated 25 percent of the meat harvested by Yukon big game outfitting clients is shipped out with hunters when they return home. The other 75 percent is donated within the Territory, including to individuals, community agencies and organizations, and First Nations entities.

Each outfitter distributes their excess game meat through their own network of contacts and relationships. Many also work through First Nations, Game Guardians, Renewable Resource Councils, and community representatives to distribute donated game meat to individual families. It is estimated that Yukon outfitters and their clients donated 150,000 pounds of high-quality game meat in 2014.

MEAT DONATIONS CASE STUDY: WHITEHORSE GENERAL HOSPITAL

For more than 20 years, Whitehorse General Hospital (WGH) has run an innovative program, the First Nations Health Program (FNHP), which provides compassionate care for First Nations people based on First Nations culture and values. Through the FNHP, approximately 3,000 traditional meals are served each year to patients at WGH. Moose stew is a favourite dish, as well as meals with caribou and sheep. Traditional food service was recently expanded to include Watson Lake Community Hospital and will soon add Dawson City Community Hospital.

Yukon outfitters play a crucial support role for the FNHP by making significant volumes of meat donations every year. Over the last two years, eight different Yukon outfitters donated wild game meat to Whitehorse General Hospital. In 2015, donations to WGH totaled approximately 2,100 pounds.

> *Traditional foods for First Nations patients is a key part of our mandate for over 20 years. We would have a hard time running the program without outfitter support. Because of this program, WGH is the envy of other institutions and has been for a long time.*
>
> *We have always recognized that patients tend to eat better when traditional foods are available. Patients tend to not have a big appetite when in hospital and it's hard to get them nourishment especially if they are used to having game meat at home. They recognize how nourishing traditional food can be, nourishing and healing. The meat is almost considered as medicine.*

Estimated Value of Game Meat Donated by Outfitters

The value of meat donations can be estimated by comparing the cost of similar products. Beef is arguably the most likely substitute for game. Table 19 models the estimated value of donated meat, based on the cost to replace it with beef hamburger and steaks. The model assumes that after deboning, about 65 percent of total donations result in an equal amount of steaks and burger. It is also assumed that two-thirds of the substituted meat is purchased in remote communities at a higher price than in Whitehorse.

Using the model based on beef substitution, the value of donated meat to Yukon residents is $1.2 million.[6] Without the donations, meat recipients would likely need to purchase this meat or get by with much less high-quality protein in their family's diet.

Table 19. Estimated Replacement Value of Meat Donated by Yukon Outfitters, 2014

	Burger	Steak	Total
Est. Pounds of Boneless Meat Donated in Whitehorse	16,250	16,250	32,500
Whitehorse Price/Pound for Beef	$4.45	$16.50	
Value of Meat Donated in Whitehorse	$72,300	$268,100	$340,400
Est. Pounds of Boneless Meat Donated in Remote Communities	32,500	32,500	65,000
Remote Community Price/Pound for Beef	$5.80	$21.45	
Value of Meat Donated in Whitehorse	$189,500	$697,100	$885,600
Estimated Replacement Value of all Donated Meat			$1,226,000

Note: Beef prices are based on July 25, 2015 prices at Wykes Grocer, Whitehorse, for burger and strip loin steaks. Remote community prices are estimated to be 30 percent higher than Whitehorse prices. Figures have been rounded.
McDowell Group estimates.

[6] Alternatively, using the price of ranch-raised elk sides ($9.75 per pound at Circle D Ranch in Whitehorse), meat donated by the outfitters would be worth slightly less than $1.5 million.

Yukon Preservation Fund

A self-imposed industry fee of $125 is assessed on each guided hunter and deposited in the Yukon Preservation Fund. This fund is managed by Yukon Outfitters Association (YOA) and used for a variety of industry support services including:

- Wildlife enhancement and conservation projects directed by YOA.
- Funding support for organizations or individuals for wildlife conservation and/or enhancement projects.
- Legal fees and court costs incurred by YOA for association-related cases and activities.
- Yukon Outfitters Association administration.

Donations

In 2014, outfitters donated $208,000 in guided hunts to organizations that support hunting in Yukon such as the Wild Sheep Foundation, Safari Club International, and the National Rifle Association. The organizations auction these hunts as fundraisers. Funds raised from one of these fundraisers allowed two disabled soldiers from the Wounded Warrior Foundation to enjoy a guided hunt of a lifetime in Yukon.

Outfitter Donations within the Yukon

In 2014, outfitters donated an estimated $25,000 in cash and in-kind services to individuals and organizations in Yukon. Donations included:

- Support for hockey schools in Whitehorse, Pelly, and Faro.
- Support for school field trips.
- Support for trappers, including breaking trails, moving supplies, cutting firewood, and purchasing pelts.
- In-kind flights to remote areas for various people and in support of various activities, including search and rescue.
- Donation of fishing rods for kids.

Yukon Outfitter Industry Situational Analysis

Yukon outfitters face a variety of challenges. The following section briefly describes issues of concern mentioned during interviews with Yukon outfitters, government land and wildlife managers, big game hunting clients, and other key stakeholders.

Regulatory Environment

Site Tenure

The outfitting industry has a long and complex history of regulation involving the Federal government and multiple Territorial departments. One of the primary issues mentioned by many outfitters is site tenure. While there is currently a limited number of outfitter site leases for existing sites, the industry has a strong desire to acquire site tenure that would allow for the construction of new facilities at new sites.

Undoubtedly, the unsettled nature of site tenure has likely resulted in less capital investment than would occur under a more flexible management structure. If outfitters are able to reach an agreement with Yukon government that settles old and new site tenure issues, there will likely be a significant increase in capital expenditures in Yukon with benefits to many local businesses.

A more detailed history of this complex issue is included in Appendix D.

Game Quotas

Game quotas have the potential to limit or reduce growth in big game guiding. Quotas for caribou and moose have been introduced for all but four outfitters. These are two of the top three most sought after species in Yukon. Concerns were raised about restrictions that cap potential harvest at historical averages may curtail future growth potential and further reductions in harvest could result in industry contraction. Although there is also some potential to increase prices for species with limited access, it is unlikely that increasing prices would make up for reductions in total harvest related to implementation of quotas.

Financing a Concession

Currently, a concession license may be revoked with cause by the Minister of the Environment without compensation. Because of this potential, banks will not allow outfitters to use a concession for collateral to receive a bank loan to fund the purchase of a concession or for capital improvements. Therefore, potential entrants must have a source of private capital either through personal savings or by partnering with others to acquire an outfitting license. The necessity of a large cash transaction is a significant hurdle to many Canadians that may be interested in entering the industry.

Game Populations

Outfitters spend a significant amount of time on the land in remote areas and observe the status of wildlife populations where few land managers frequent. Outfitters share this information which allows those responsible for managing the game to have a higher level of confidence when making management decisions. It is in the interest of outfitters to manage the game in their concessions to prevent over-harvest that would lead to a decline in game quality. Some outfitters voluntarily stop hunting certain areas for a number of years if the population of game animals starts to decline – some to the point of booking fewer hunts than they could sell. This practice allows populations to rebound which benefits outfitters and resident hunters.

Overall, outfitters and game managers report that big game populations are healthy in the Territory. One area of concern mentioned is the health of wild sheep populations, which are highly susceptible to pneumonia transmitted from domestic sheep. Domestic sheep may need to be isolated from wild sheep. The Yukon Government is considering conducting an assessment of domestic sheep and goats in Yukon to better understand the scale of the issue and whether regulation is needed.

Sheep are the premium game animal in the Territory, with the highest value of all species. A decline in sheep populations could impact the reputation of Yukon and have serious financial consequences for outfitters. Resident sheep hunters would also be affected if sheep populations decline.

Predator Management

An issue mentioned by many outfitters is the need for increased predator management. Although Yukon Government has previously tried aerial hunting on a small scale, there is no current predator management program. According to a government official interviewed:

> *Predator management is expensive and the Territory's wildlife research budget is only about $1 million annually.*
>
> *We have so much land that aerial hunting is just not practical or affordable, and the effects were limited.*
>
> *Predator management is controversial. There is not a lot of public support from Yukon residents or people living elsewhere for aerial hunting in Yukon. We have seen protests related to wolf hunting damage our tourism industry before. Alaska has had problems also. Tourism is very important to our economy.*

The Yukon Wolf Conservation and Management Plan was created by Yukon government in the early 1980's to test the effectiveness of aerial and other wolf management strategies. There was evidence, particularly in the Finlayson Recovery program, that aerial wolf control positively affected game populations. After aerial predator control was instigated, the Finlayson caribou herd had doubled in size between 1983 and1990 to about 6,000 animals and regional moose numbers were estimated to have almost tripled from 3,000 to 9,000.[7]

The 2012 update of the Yukon Wolf Conservation and Management Plan states that aerial control is no longer a recommended management tool because of public opposition, high cost, and short-term impacts. While earlier management efforts were successful, the increase in ungulates after aerial control was not sustainable without ongoing control efforts.[8]

[7] http://www.yfwcm.ca/YukonWolfPlanReview/going/documents/Finlayson_wolf_management_program_FINALApr_11_206.pdf
[8] Yukon Fish and Wildlife Management Board. 2012. Yukon Wolf Conservation and Management Plan.

Wolf hunting and trapping regulations are liberal in Yukon, but hunters take relatively few wolves and trapping is a challenging and expensive undertaking, especially in remote areas during winter conditions.

The total harvest of wolves by trappers in 2012-2013 was 183. On average, trappers harvested 192 wolves per annual trapping season, from 2005-2006 through 2012-2013 (see table 21). In addition to trapping, the total harvest of wolves by resident and non-resident hunters combined in 2012-13 was 42. A combined harvest of 225 wolves Territory-wide in 2014 likely had minimal effect on increasing, enhancing, or protecting ungulate populations. Wolf bag limits are more generous for residents (7 wolves) than for non-residents (2 wolves). Increasing the bag limit for non-resident hunters would allow for an increased harvest at zero cost to the government and in fact, would increase revenues through higher harvest fees and would likely be much less controversial than other methods of wolf management.

Table 20. Yukon Wolf Trapping Statistics, 2005-2006 to 2012-2013 Seasons

Season	Concession Holders with Trapping Licenses	Assistant Trappers	Total Licensed Trappers	Wolves Taken	Avg. Pelt Value	Wolf Pelt Value
2012-13*	316	212	528	183	$197	$36,051
2011-12	320	221	541	248	$181	$44,888
2010-11	294	174	468	237	$144	$34,128
2009-10	280	169	449	221	$150	$33,150
2008-09	319	164	483	172	$168	$28,896
2007-08	300	143	443	169	$161	$27,209
2006-07	319	145	463	145	$152	$22,040
2005-06	319	140	459	164	$129	$21,156
Average	308	171	479	192	$160	$30,940

Note: Information for 2012-2013 are incomplete due to lag in submission and cataloging fur harvest information.
Source: Yukon Government

Outfitters engage in predator management in various ways. About half of outfitters have trapping licenses and engage directly in predator harvest (wolf and wolverine). Some provide snares and other support to local trappers to help increase their take. In addition, Yukon Outfitters Association, in partnership with Yukon Fish and Wildlife Enhancement Trust, awards $200 per wolf to any person holding a valid trappers license that provides seal receipt from the Yukon government. In addition to contributions from the Yukon Outfitters Association, the Wild Sheep Foundation, has provided $5,000 annually for the past few years for the Wolf Pelt Handling Program. This program was designed to reward ethical practices in the trapping of wolves. These monetary awards help to support local trappers and keep them in the field. Outfitter support for predator management benefits their operations, as well as all hunters in the Territory, by helping to keep predator populations in check and reduce predation of game animals.

Resource Development

Starting in 2010, Yukon experienced unprecedented levels of mineral exploration activity which lasted for several years. Outfitters – who market the ability to hunt in near-solace – were faced with an increased level of helicopter and fixed-wing flight activity, which can spook big game and impact the experience of hunters seeking a pristine wilderness experience. Sheep are particularly vulnerable to impacts from helicopters, as they are easily run off the mountains and tend to stay off for periods of time. This can be a problem for the outfitter if the sheep are run off just prior to the hunting season. It can also be a game management problem if the sheep are run off of their wintering areas or if they are disturbed while they are having lambs.

The requirement to physically stake mineral claims drives the demand for helicopter and fixed-wing flights. The *Quartz Mining Act* requires miners to move dirt to keep claims in good standing and can result in lingering effects on the land beyond the initial exploration activity. Companies conducted widespread staking and sampling, and some left stakes, core samples, and packing materials behind. In addition, mining activity that opens up access to remote areas results in increased off road vehicle (ORV) activity and higher numbers of hunters and increased harvests. In recent years, talks between outfitters and the mining industry – as well as a decline in exploration – have resulted in a reduction in conflicts.

Off Road Vehicles (ORV)

Mining activity includes the development of access roads to remote sites. ORV riders take advantage of these routes to reach deeper into the wilderness and once a route is established, they tend to be extended over time and provide increased access into ever more remote areas.

Outfitters reported they are not at all anti-resident hunting. They share a common interest in outdoors activities and concern for wildlife and the environment. However, increased access can complicate outfitter stewardship of the land and increase harvest of animals in the concessions they manage. The most critical components of the outfitters product are pristine wilderness and the opportunity for their clients to harvest a quality animal. Even a small amount of increased activity can inadvertently blemish a hunt from the client's perspective.

Some outfitters and residents have also increased their use of ORVs, particularly Argos. ORV use tends to disturb the environment much more than traditional hunts via horses. ORVs are noisy and impact trails much more than horses. Once established, ORV trails can remain visible for decades. Outfitter clients as well as other interviewees, mentioned ORV use as detracting from the quality of the hunt. There are currently no Yukon-wide ORV regulations that limit use.

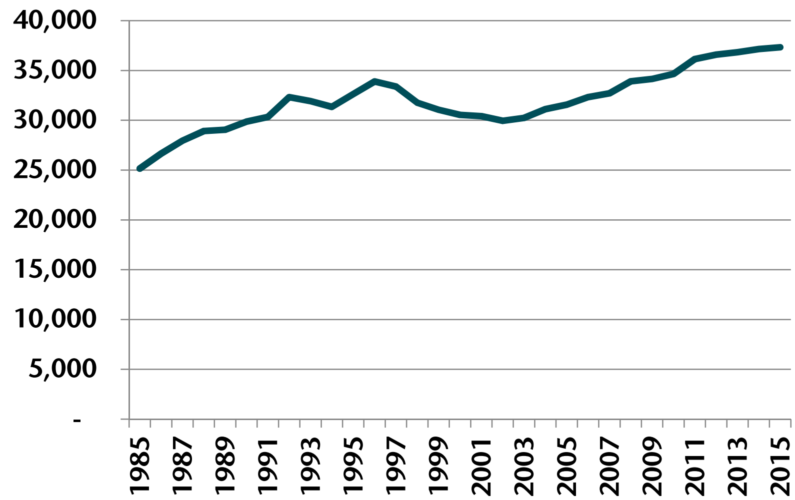
> *ORVs are no good, they can screw up the land in one pass. Water starts to flow in the tracks and tends to erode the land.*

> *Allow ORV use on mining roads only. Hunters [guided and resident] can walk from there. If they drive even 10 feet off the roads, they should get into trouble.*

Increased Hunting Activity

While the number of outfitting industry clientele has remained relatively stable over the last two decades, there has been a rise in the estimated resident population of 14 percent from 32,635 in 1995 to 37,343 in 2015. Resource development and growth in government (Federal, Territorial and First Nation) have been the primary drivers of this increase. Along with this increase in population is an increase in resident hunting activity which puts more pressure on game populations, especially in the most accessible areas.

Yukon Population Estimates, 1985 to 2015

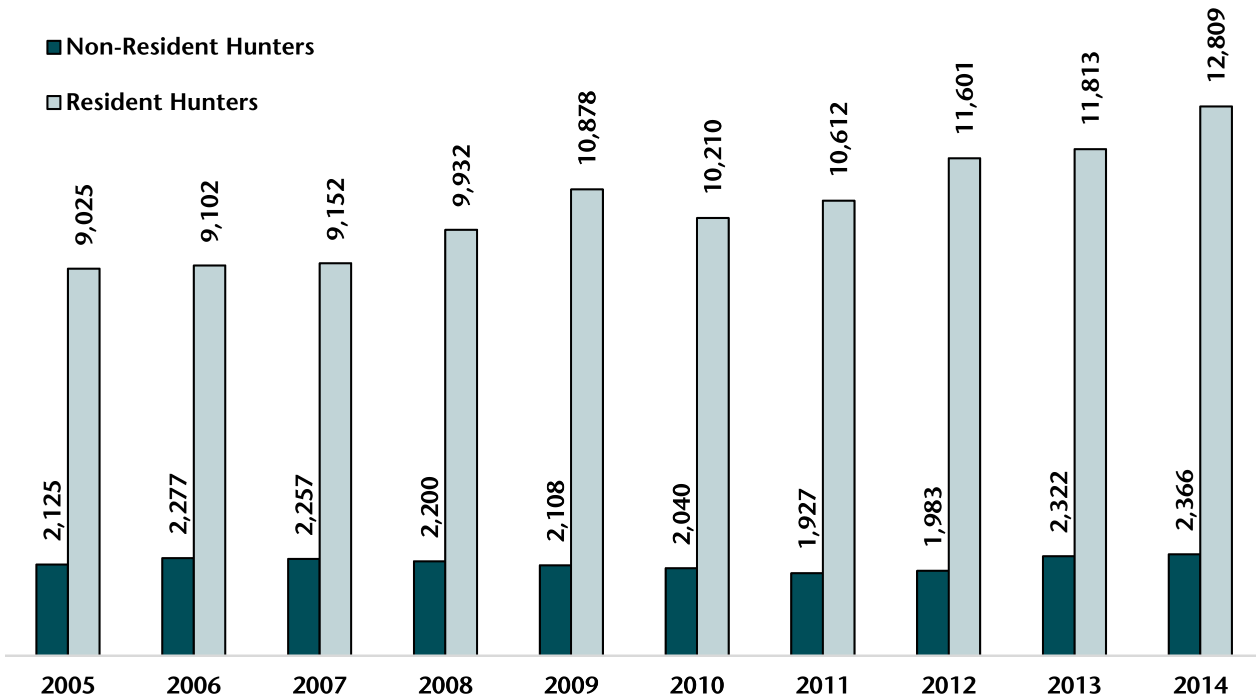


Source: Government of Yukon, Department of Health & Social Services and Yukon Bureau of Statistics.

As illustrated in the chart below, the number of big game seals purchased by non-resident hunters has increased by 11 percent from 2,125 in 2005 to 2,366 in 2014. In contrast, the number of big game seals purchased by Yukon resident hunters (Aboriginal and non-Aboriginal) increased by 42 percent from 9,025 in 2005 to 12,809 in 2014. This study did not review data on resident harvest but it is assumed that as the number of seals sold increases so does the harvest.

An increase in overall hunting activity especially in the most accessible areas could result in greater pressure on localized populations of big game animals.

Big Game Seal Sales, Resident and Non-Resident, 2014



Note: resident seals include aboriginal and non-aboriginal hunters.
Source: Yukon Government, Fish and Wildlife Branch.

Special Guide Permits

Several outfitters mentioned they had concerns with abuse of the special guide license system that allows Yukon residents to guide non-resident Canadians. It is unlawful for the guide to accept payment or any kind of reward for guiding. There were 100 special guide licenses issued in 2014 and hunters are allowed to harvest multiple species after purchasing the appropriate seals. When asked about abuse and enforcement, a government representative stated:

> *We work hard to enforce the regulations. They get hammered if they get caught. If we find it happening, we act on it. These permits don't have a huge effect on game populations, a hundred hunters take about 20 moose a year.*

Hunters with special guide licenses take relatively few animals. Permit hunters are not eligible to hunt sheep or grizzly bears. The primary species sought are moose and caribou. In 2014, hunters harvested 29 moose and 15 caribou, close to the 10 year annual average of 26 moose and 16 caribou.

Table 21. Special Guide License Harvest Moose, and Caribou, 2005 to 2014

Year	Moose	Caribou
2014	29	15
2013	17	12
2012	24	5
2011	33	14
2010	20	20
2009	23	18
2008	32	32
2007	25	12
2006	33	13
2005	23	16
Average	26	16

Source: Yukon Government, Fish and Wildlife Branch.

It is unlikely that many of the non-resident hunters that are guided under a special permit would book hunts with Yukon outfitters in the absence of the special guide license. With the implementation of quotas for moose and caribou, outfitters are likely more concerned with the harvest levels and the effects this may have on their allocation. It could also be problematic if special guide hunter efforts were concentrated in certain areas that also receive pressure from resident hunters and outfitters.

From the outfitter's perspective, limiting the number of permits and implementation of a system that only allows special guide permits for Yukon resident's relatives could reduce the overall harvest and limit the potential for abuse of the system.

Handling of Game Meat

The Environmental Health Services branch of Yukon Department of Health and Social Services – as part of its responsibility to ensure the safety of water and food consumed in public places – issued new regulations in late 2014 related to the public consumption of game meat. While the Branch acknowledges the cultural and nutritional benefits of consuming wild game meat, it categorizes wild game meat as "uninspected." As a result, special permission is required before wild game can be served to the public, such as at schools, hospitals and long-term care facilities, and public events. Meat donations made to individuals do not require special permission.

Receiving special permission requires that safe food handling guidelines have been followed. Both the hunter and the receiver of each donation of meat must sign forms that document the handling of the meat from the kill site to the kitchen. For regulated kitchens in Yukon, this 2014 change means additional attention to safe handling guidelines, including kitchens at small community organizations. For outfitters, this change means additional paperwork and continued effort to keep meat cool and clean, and deliver it quickly from remote kill sites to recipients. It is important for outfitters to understand the new regulations and handling practices in order to operate the most effective and wide-spread donation program possible. By most accounts, Yukon outfitters are doing an excellent job of donating meat that has been properly handled, but the new regulations will require additional efforts.

Public Relations

Many outfitters feel the industry as a whole would benefit more from public relations outreach within Yukon. Relationships between the outfitters, government, and the public have at times been strained. There is likely a lack of understanding of the industry by many residents as, for the most part, the outfitter's product is created and consumed in remote parts of the Territory. Anti-hunting sentiments and predator management can be extremely emotional issues for some segments of the population. While a well-crafted PR campaign may not change some people's opinions, outfitters should highlight the positive aspects of their activities and how they benefit other Yukon residents.

Industry Outlook

Strong Global Market

Yukon outfitters have a strong global market position. Ranking guided hunting destinations is subjective, and to a large degree depends on the game desired. However, there are a handful of locations that are near the top for most hunters around the world, and Yukon is one of them. Other top hunting destinations around the world include Africa, Alaska, Asia, British Columbia, Alberta, and Northwest Territories. Other destinations that provide quality guided hunting experiences include Mexico, Australia, and New Zealand.

Political stability is an issue in the world of guided hunting. Some destinations in Africa and Asia are inaccessible because of political strife. Russia is a desirable location for many hunters, but crime, political corruption, poor infrastructure, and politics make it a difficult choice. North America, including Yukon, benefits from long-term political stability.

While there is no aggregate data available on the volume of guided hunting globally, the industry appears to be in relatively good shape. One measurable example of interest in guided hunting (particularly among the critical US market) is that Safari Club International (the world's largest sport hunting organization) reports an increasing number of vendors and attendees at their annual convention and trade show in Las Vegas in recent years. The trend for Yukon hunters has also been positive in recent years and preliminary data for 2015 shows another year of growth. The following comments gathered during interviews provide some insight into the current and potential outlook of the industry.

> *Yukon has gained in brand recognition the last couple decades, especially with Europeans. Although, more Americans are starting to hunt sheep in the Yukon because of trophy quality.*
>
> *It used to be people would think "white sheep" that's Alaska. But there has been a shift to Yukon because of quality animals there. It takes time for the market to realize there are changes but word spreads. Yukon is getting a 20 to 30 percent premium now over a comparable Alaska*

sheep hunt. Most of Alaska's opportunity for big sheep are drawing only, with no non-resident hunters allowed.

The value of a guided hunt is depressed in Alaska. We don't have certainty or areas and allocation. Canada is more stable in the long run, politically and in the quality of game and outdoors. Low resident populations and exclusive concessions allow for high-quality wilderness hunting opportunities.

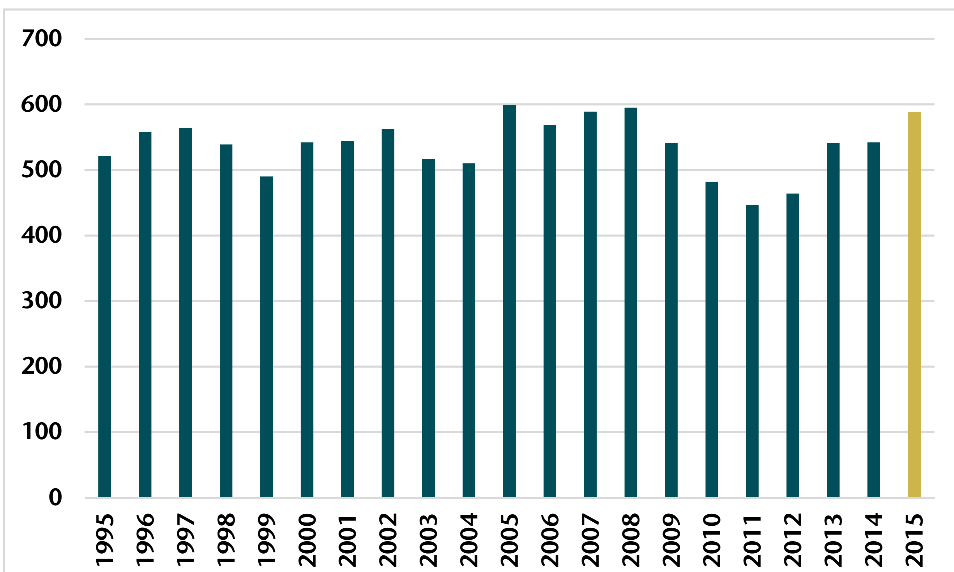
Anti-Hunting Sentiments

Ever-present anti-hunting sentiments were rekindled in 2015 with the widely-publicized death of "Cecil the Lion" in Zimbabwe by a guided hunter. After the incident, several national and international airlines announced they would not transport animals harvested on guided hunts, which could make it more difficult for some Yukon hunters to bring their animals home with them. Whether the events of 2015 will effect sales of guided hunts in Yukon is not yet known, as most hunts are booked at least a year in advance.

Outlook

The table below shows that the number of guided Yukon hunters from 1995 through 2015 has been relatively stable. The most significant decline was in the 2010 to 2012 period when a serious recession affected the US and other economies. The annual average for the 21-year period is 538 hunters. A preliminary count of hunters in 2015 showed 588 hunters, significantly above the long-term average. 2015 would mark the fourth year of growth in hunters after the 2011 bottom.

Table 22. Yukon Guided Hunters 1995 to 2015 (preliminary)



Source: Yukon Government, Fish and Wildlife Branch and The Yukon Outfitting Industry: An Economic Analysis of the Yukon Outfitting Industry, 2005, Pacific Analytics.

Two issues mentioned as potentially impacting outfitters are a strong U.S. dollar and game quotas that significantly reduce outfitters ability to harvest key species. All Yukon hunts are priced in U.S. dollars and the U.S. dollar has strengthened considerably versus the Canadian dollar and other currencies over the last couple years, resulting in an increase in the cost of a hunt when purchased with other currencies. Historically, there seems to be little effect on the volume of U.S. hunters during times of a strong US dollar, while the purchasing power of Canadians and non-U.S. alien hunters is somewhat diminished.

As previously mentioned, quota restrictions on big game animals taken by outfitter clients could also impact the volume of outfitter bookings and reduce outfitter revenues and spending within the Territory.

Many outfitters express some degree of stress and frustration because of the challenges facing their industry. Still, the majority of outfitters reported they are optimistic about their industry and livelihoods, and the benefits their industry brings to Yukon. Assuming that Yukon maintains quality animals and environment, and the industry does not suffer significantly restrictive quotas, it seems likely the state of the global economy and more importantly, the U.S. economy will be the most significant factor in future demand for Yukon hunts.

Opportunities for Increasing Wilderness Tourism

Several interviewees mentioned that wilderness tourism is a potential growth area for outfitters. In 2014, only five outfitters provided a service to their clients other than hunting. Among the five outfitters there were 10 fishing clients and 13 wilderness tourism clients (including winter activities). Three of those five outfitters also hosted film crews.

There is no doubt that Yukon has premier products to offer wilderness tourism clientele and that outfitters have offered such products for the last 100 years. Site tenure and land use issues aside, wilderness tourism is challenging because of outfitter's operating model. Outfitters have significant expenses in maintaining infrastructure and transporting clients to remote areas. This necessitates fairly high fees for wilderness tourism packages. The volume of clients willing to pay premium prices for activities such as horseback riding, canoeing, and photography is relatively limited. It is also much more difficult and expensive to market to this audience. One outfitter mentioned frustration that he had spent $5,000 recently on wilderness tourism marketing with no related bookings.

One advantage of wilderness tourism is that groups can be guided by one guide, resulting in lower payroll expenses. It is likely easier for outfitters located closer to roads and communities to conduct wilderness tourism activities, as transportation costs will be lower.

Wilderness tourism can supplement outfitters primary activity of hunting but is unlikely to generate comparable levels of revenue for the same level of effort as guided hunting and will likely remain a minor portion of outfitter revenues.

Appendix A: Interviewees

The following were interviewed or provided data for this study:

Adrian Skok, Hunt broker and Canadian guide, Global Sporting Safaris, Inc.

Carol Wrenshall, British Columbia Fish and Wildlife Branch

Mike Walowitz, British Columbia Fish and Wildlife Branch

Rob Hollindar, Conventions and Events, Safari Club International

Ed Grasser, Vice President, Safari Club International

Michael Roqueni, Director of Membership Development, Safari Club International

Steve, Co-owner, Gold Originals by Charlotte

Dan Lindsay, Director, Fish and Wildlife Branch, Yukon Environment

Kris Gustafson, Director, Conservation Officer Services, Yukon Environment

Graham Van Tighem, Executive Director, Yukon Fish and Wildlife Management Board

Pierre Germain, Director Tourism, Yukon Tourism

Tim Dewhurst, Teslin RRC Member, Teslin Tlingit Council

Ian Frazer, Dawson City RRC

Tim Mervyn and Dean Sandulak, Yukon Outfitters Association officials

Mark Broadhagen, Conservation Officer (and Kaska member), Liard First Nation

Susan Smith, Secretary, Alsek RRC

Lyle Henderson, ADM Sustainable Resources, Yukon Energy Mines and Resources

Colin McDowell, Director, Land Management Branch, Yukon Energy, Mines and Resources

Terry Kennedy, CORE Committee – Consultant, Yukon Energy Mines and Resources

Kerry Nolan, Victoria Faulkner Women's Centre

Laura Salmon, Director – First Nation Health Programs, Whitehorse General Hospital

Tristan Newsome, Whitehorse Food Bank

Benton Foster, Environmental Health Services, Yukon Health and Social Services

Blake Rogers, Executive Director, Tourism Industry Association Yukon

Murray Hampton, Faro Studio Hotel

Gerd Mannsperger, Chief Pilot, Alpine Aviation

Derrick Drinnan, Owner, Blacksheep Aviation

Mark LeBlanc, Manager, Pacesetter Petroleum

John Pausch, Owner, Off the Hook Meat

Kyle Doll, Owner, GP Distributing

Thor Stacey, Alaska Big Game Guide, Lobbyist for the Alaska Professional Hunting Guides Association.

Russ Giesbrecht, Northfork Taxidermy

Pat, Jay, Paul, and Bob, guided Yukon hunters

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Appendix C: License, Seal and Harvest Fee Data

Table 23. License Fees

	Cost
Non-resident Canadian	$75
Non-resident alien	150

Source: Yukon Hunting Regulations Summary, 2014-2015

Table 24. Big Game Seal Fees

Species	Cost
Moose	$5
Caribou	5
Sheep	10
Goat	20
Deer	50
Elk	10
Bison	10
Grizzly bear	25
Black bear	5

Source: Yukon Hunting Regulations Summary, 2014-2015

Table 25. Non-resident Harvest Fees

Species	Cost
Coyote	$50
Wolverine	75
Moose	150
Mountain goat	200
Grizzly bear – male	500
Grizzly bear – female	750
Wolf	75
Black bear	75
Caribou	150
Mountain sheep	250
Bison	500

Source: Yukon Hunting Regulations Summary, 2014-2015

Table 26. Non-Resident Licenses Sold by Country of Residence, 2005-2014

Country	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	Total
USA	472	469	461	449	380	356	316	341	392	419	4,055
Canada	57	55	83	91	98	69	83	76	110	105	827
Germany	19	8	19	11	10	10	14	9	8	5	113
Mexico	11	11	9	9	6	15	11	8	5	15	100
Austria	13	7	2	4	14	11	8	21	9	7	96
Spain	12	9	7	6	1	4	1	1	1	3	45
Australia	3	4	5	2	--	1	12	2	7	2	38
Denmark	1	3	8		--	4	2	3	5	3	29
Norway	2	--	4	1	1	6	--	6	4	3	27
Switzerland	1	--	--	4	5	3	3	1	7	3	27
Italy	7	1	1	6	3		2	3	2	1	26
Sweden	5	3		5	7	3	2	--	--	--	25
New Zealand		1		2	4	1	3	4	4	5	24
Hungary	4	11	1	4	--	--	--	--	--	--	20
Belgium	2		1		1	5	--	2	2	--	13
Czech Republic	1	--	--	4	3	2	--	--	--	--	10
Poland	--	--	--	--	6		4	--	--	--	10
Russia	--	--	--	--	--	--	5	2	1	2	10
Argentina	--	--	--	--	3	2	--	1	3		9
Slovakia	--	--	3	3	2		--	--	1	--	9
France	--	--	--	2	1	1	--	1	1	1	7
Portugal	--	1	--	1	3	1	--	--	--	--	6
Bulgaria	--	--	--	--	2	--	--	2	--	--	4
England	--	2	1	1	--	--	--	--	--	--	4
South Africa	--	--	2	--	1	--	1	--	--	--	4
Croatia	--	--	--	--	--	--		3	--	--	3
Kuwait	--	--	--	--	1	1	--	--	1	--	3
United Kingdom	--	1	--	2	--	--	--	--	--	--	3
Buenos Aires	--	--	--		2	--	--	--	--	--	2
Finland	--	--	--	1	1	--	--	--	--	--	2
Guanajuato	--	--	--	--	--	--	--	2	--	--	2
Netherlands	--	--	--	--	--	--	--	--	2	--	2
Turkey	--	--	2	--	--	--	--	--	--	--	2
Others*	2	--	1	2	1	4	2	1	1	5	19
Total	612	586	610	610	556	499	469	489	566	579	5,576

*Countries with one visitor grouped in the "other" category include: Bahamas, Columbia, Costa Rica, Egypt, Latvia, Luxembourg, Moscow, Namibia, Niger, Nigeria, Panama, Ukraine. Total unknown visitor origin is 7 from 2005–2014.
Source: Yukon Government, Fish and Wildlife Branch.

Table 27. Non-Resident Seals Sold, by Species, 2005 – 2014

Year	Moose	Caribou	Sheep	Goat	Grizzly	Black Bear	Bison	Total
				Species				
2014								
Seals Sold	538	517	365	17	489	432	8	2,366
2013								
Seals Sold	501	515	327	20	476	480	3	2,322
2012								
Seals Sold	444	436	279	25	412	385	2	1,983
2011								
Seals Sold	427	447	267	16	416	353	1	1,927
2010								
Seals Sold	465	496	277	12	435	351	4	2,040
2009								
Seals Sold	472	511	292	10	426	397	0	2,108
2008								
Seals Sold	511	503	320	14	463	389	0	2,200
2007								
Seals Sold	503	555	312	15	455	415	2	2,257
2006								
Seals Sold	504	506	350	19	456	440	2	2,277
2005								
Seals Sold	464	515	326	9	426	380	5	2,125
Annual Average	483	500	312	16	445	402	3	2,161

Source: Yukon Government, Fish and Wildlife Branch.

Table 28. Non-resident Harvest by Species, 2005 – 2014

Year	Moose	Caribou	Species Sheep	Grizzly Bear	Goat	Black Bear	Bison	Annual Total
2014								
Total	214	96	140	41	12	8	7	511
2013								
Total	207	126	130	43	7	9	3	522
2012								
Total	183	103	131	34	0	9	2	460
2011								
Total	212	110	120	42	1	9	1	494
2010								
Total	229	100	139	38	4	4	4	514
2009								
Total	224	129	152	36	2	8	0	551
2008								
Total	238	130	157	32	5	11	0	573
2007								
Total	243	120	164	27	2	6	2	562
2006								
Total	251	110	190	36	5	9	1	601
2005								
Total	247	142	186	46	0	6	5	627
Annual Average	225	117	151	38	4	8	3	542

Source: Yukon Government, Fish and Wildlife Branch.

Appendix D: Outfitter Regulation in Yukon

The current approach to big game outfitting in Yukon can be traced back to the earliest days of territorial governance. Yukon was granted the legislative responsibility for game resources in July 1900 and that responsibility was first exercised in 1901 with the passage of *An Ordinance Respecting the Preservation of Game in the Yukon Territory.* A revised *Yukon Game Ordinance,* passed in 1920, created a licensing system for Chief Guide, Assistant Guide and Camp Helper. A 1933 amendment to the *Game Ordinance* required, for the first time, that non-Yukon resident hunters had to hire guides while hunting in Yukon.

In 1947, the *Yukon Game Ordinance* was again revamped and introduced a new class of licensee, an "Outfitter", defined as one who "carries on or is engaged in or concerned in the business of renting or letting for hire saddle horse, pack horse, vehicles, boats or other equipment for the purpose of being used in the hunting or taking of big game." (McCandless; 1976, 9). Soon after the 1947 revamp of the *Yukon Game Ordinance,* outfitters in Yukon organized themselves into an association of sufficient cohesion to begin to delineate exclusive hunting areas in the Territory. A 1952 amendment to the *Ordinance* introduced the concept of "guiding territory" and a 1958 "gentlemen's agreement" between outfitters regarding concession areas was later formalized with the creation of 22 Registered Guiding Areas in 1959 (there are currently 20 concessions).

Outfitting concessions in Yukon are currently regulated under the Yukon *Wildlife Act* which grants an exclusive opportunity for big game guiding in each concession area. The use of the phrase "*exclusive opportunity"* is important to emphasize for two reasons. First, it confirms that assignment of an outfitting concession by Yukon Department of Environment does not confer "ownership" of the wild game resource, as the resource continues to be managed by Yukon Government and publically owned. Second, the use of the word "opportunity" means that the acquisition of an outfitting concession does not confer rights of ownership for continued use of the outfitting concession.

Administration of Wildlife and Lands

A key feature of the regulatory context of Yukon's outfitting industry involves the separation of responsibility for the administration of wildlife from the administration of lands.

The construction of infrastructure necessary to operate an outfitting business – including hunting lodges, cabins, landing strips, and docks – requires the occupation and use of Commissioner's (Crown) land. However, tenure over outfitting territories was never granted to outfitting license holders, and the issue of land tenure for necessary outfitting infrastructure has fallen to a separate department (Energy, Mines and Resources (EMR)) administered by separate legislation (the *Territorial Lands Act).*

The transfer of responsibility for the management of game in Yukon was among the first examples of the devolution of federal responsibilities to the Yukon Territory in 1900. In contrast, the transfer of authority for the administration of lands in Yukon was among the very last in 2003 when the process of federal-territorial devolution was completed.

The organizational history is illustrated below in a timeline of management responsibility for wildlife and lands in Yukon from 1900 to present.

Table 29. Timeline of Management Responsibility for Wildlife and Lands Canada and Yukon – 1900 to Present

	1900	1910	1920	1930	1940	1950	1960	1970	1980	1990	2000	2010
Wildlife	Yukon											
Lands	Canada											Yukon

SITE TENURE

Yukon's outfitting industry has been confronted in recent years with a rapid shift in the administration of lands in Yukon. Whereas the Government of Canada's approach to land tenure issues between 1900 and 2003 could perhaps be described as *laissez faire,* Yukon's government moved quickly to address the specific-site land use tenure issue after taking on responsibility for management of Yukon lands in 2003. Site-specific land tenure means that outfitters would pay a lease fee and be allowed (under a set of guidelines) to develop pre-existing and new sites within their concessions. Prior to 2003 there were only a few site leases granted by the Federal government for existing sites.

By 2006, the EMR Land Management Branch had approved a *Big Game Outfitting Land Application Policy* with an objective "to facilitate tenure applications for longstanding occupancy situations (pre-existing sites) from big game outfitting concession holders." Only three outfitters have made applications for land under the new policy since 2006. From the outfitters perspective, the *Big Game Outfitting Land Application Policy* is deeply flawed having been conceived without consultation with Yukon outfitters. The policy while allowing application for existing sites, had no provision for acquiring tenure to new sites which would allow outfitters to be more flexible, expand the reach of their guiding operations within their concessions, and provide a higher quality of accommodations and service that their clientele demands.

Further complicating operational efficiencies is that land tenures acquired under the *Big Game Outfitting Land Application Policy* now permit use of those sites for backcountry pursuits such as wilderness tourism, sites for which tenure has not been acquired, may only be used for outfitting activities. Thus, an outfitter who has not acquired site tenure and who also provides wilderness tourism services may not use a cabin on non-tenured land for wilderness tourism activities such as wildlife photography or snowmobile touring.

This "silo" approach to backcountry land tenure has served to increase tensions between Yukon outfitters and the Yukon EMR as, from the outfitter's perspective, it serves to limit the growth of Yukon's outfitting industry. From the EMR perspective, however, the department bears a responsibility to ensure that all activities on Commissioner's land are undertaken under proper land use authorizations to limit liability and risk.

A committee has been meeting in recent years to define policy elements and move the discussion of site tenure and other issues forward. The committee is composed of representatives of the EMR, Department of Environment, Yukon Outfitters Association, Yukon Miners Association, and others.