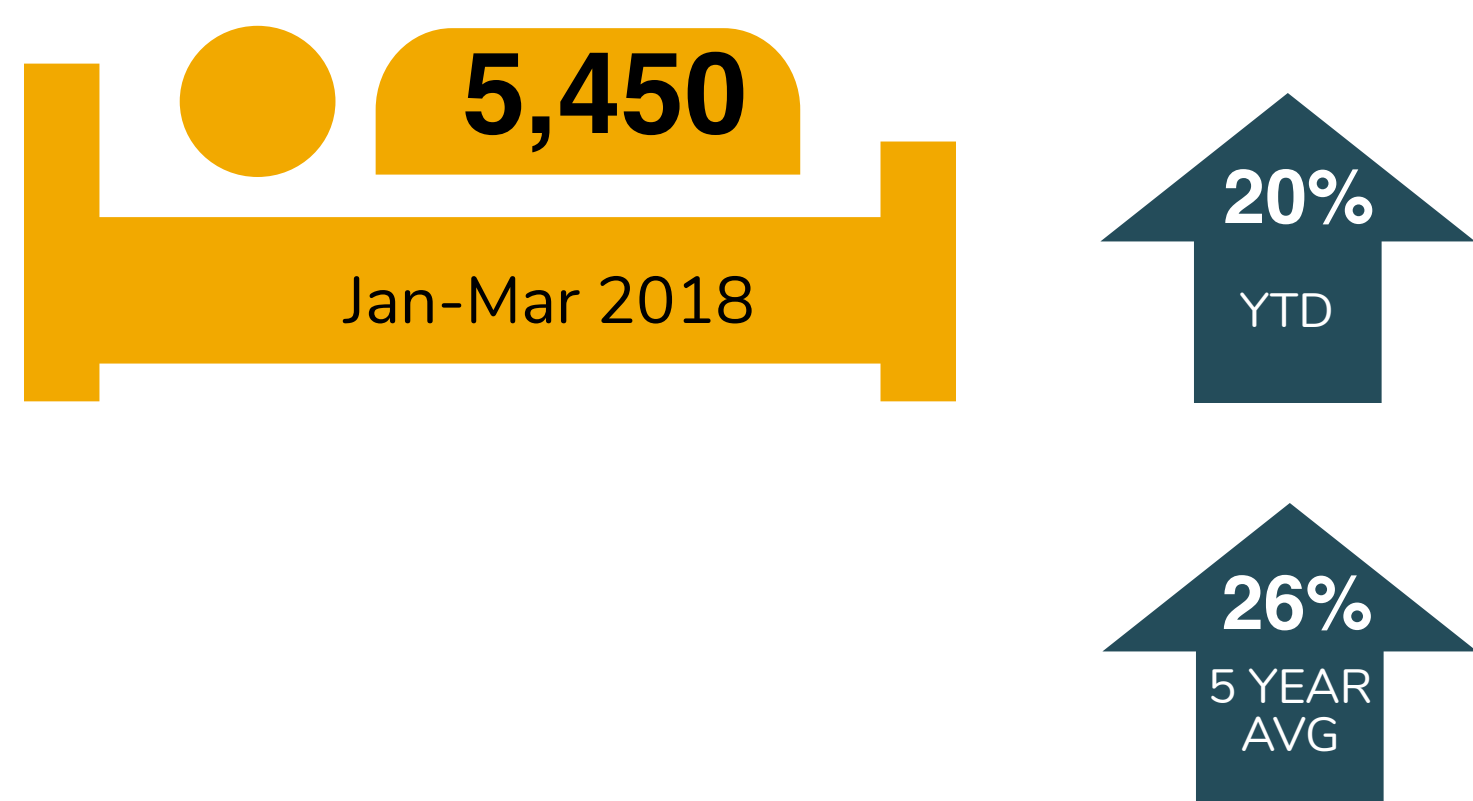


# Yukon Tourism Visitation Report

## Jan - Mar 2018

### Q1 Highlights

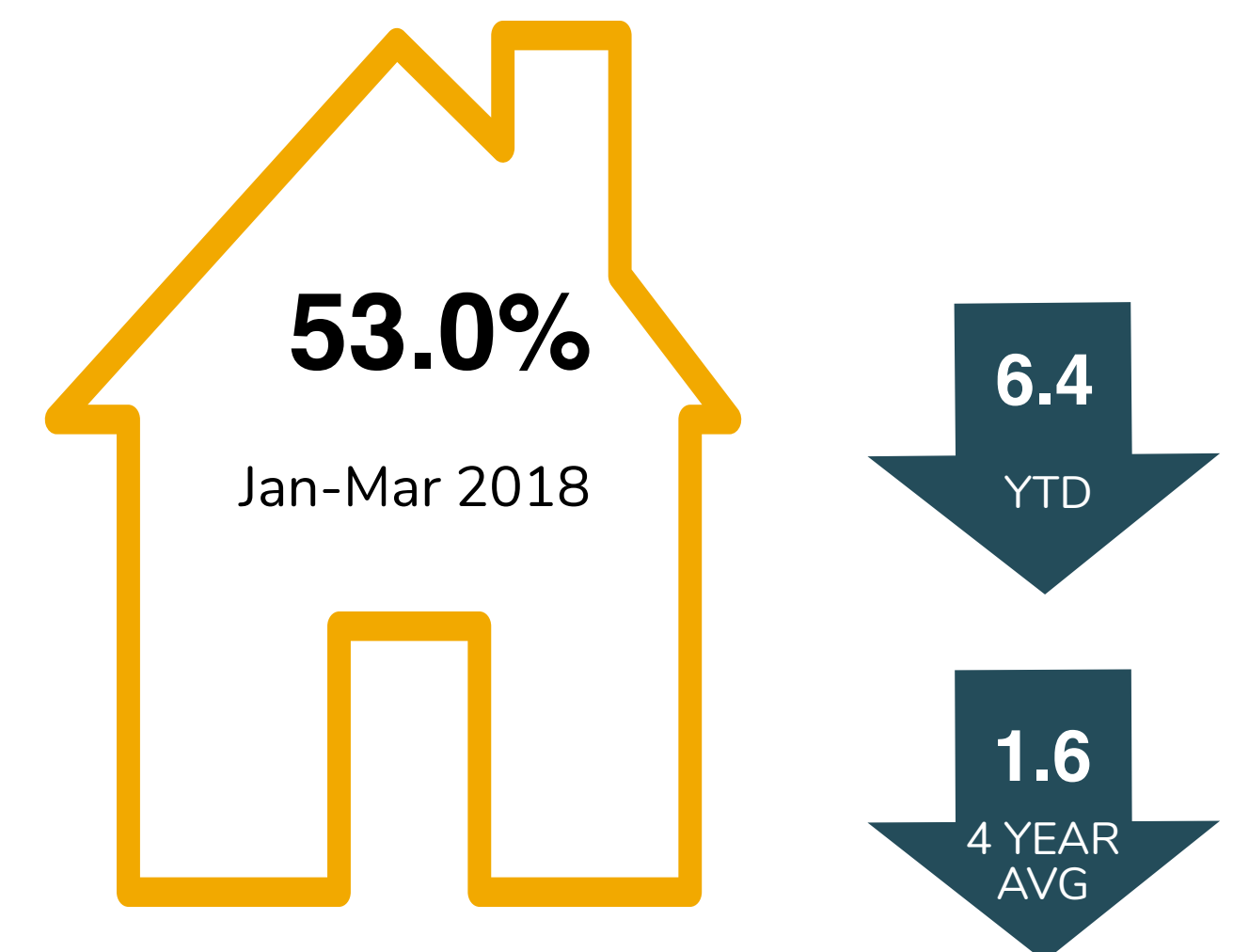
#### International Overnight Visitation (1+ Nights)



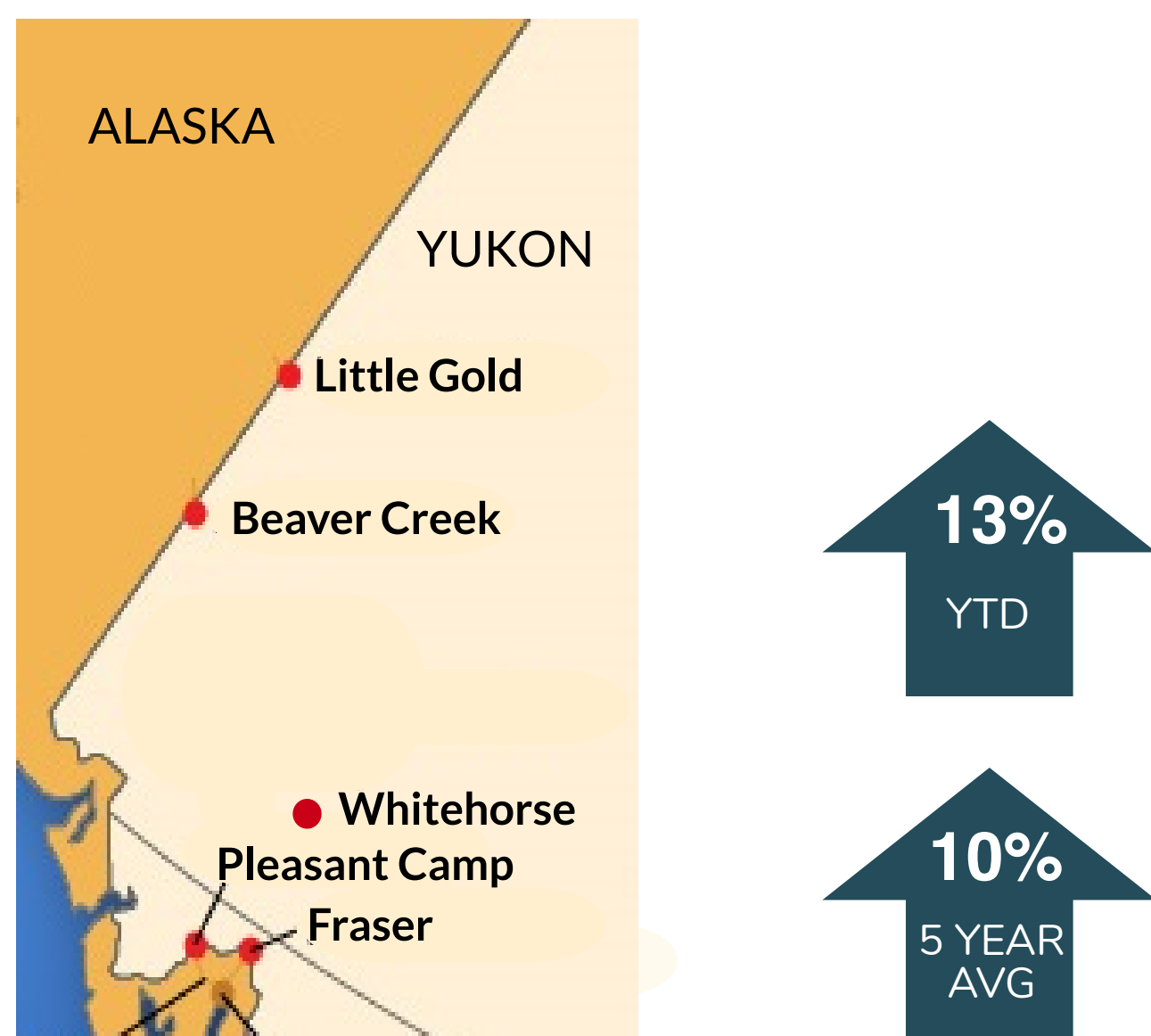
#### Air Arrivals at Erik Nielson Whitehorse International Airport



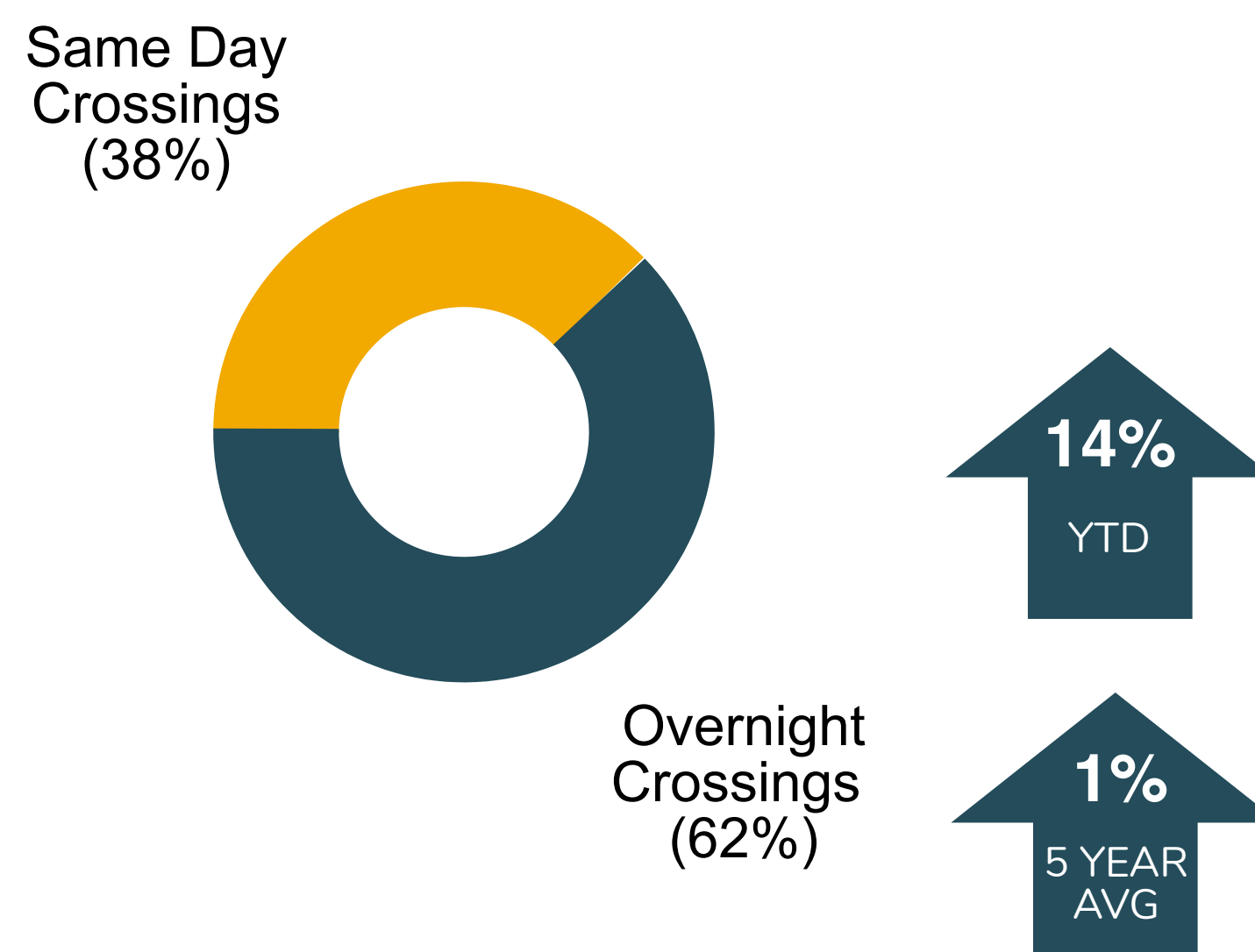
#### Occupancy at Select Fixed Roof Accommodations



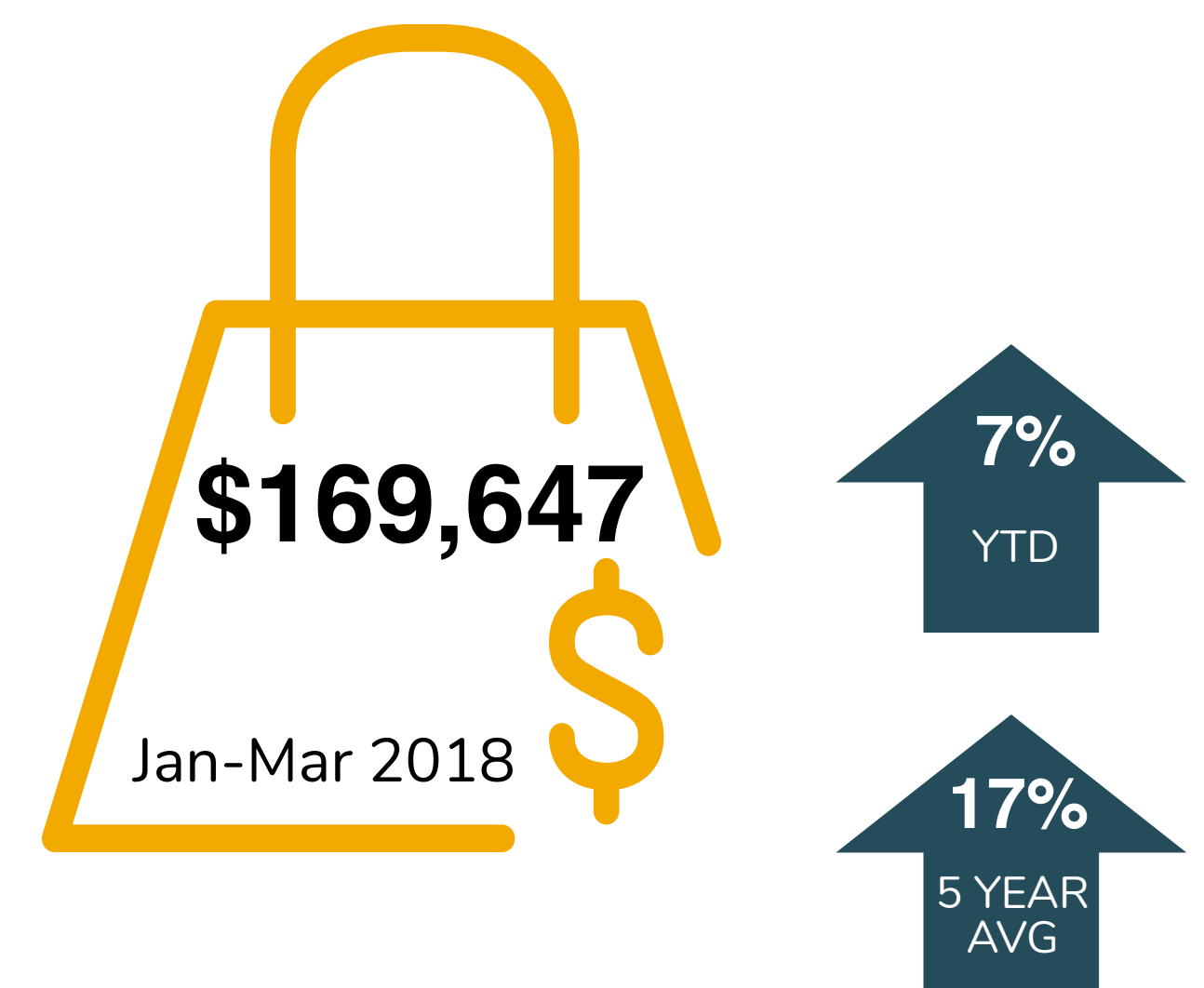
#### International Border Crossings (Into Yukon)



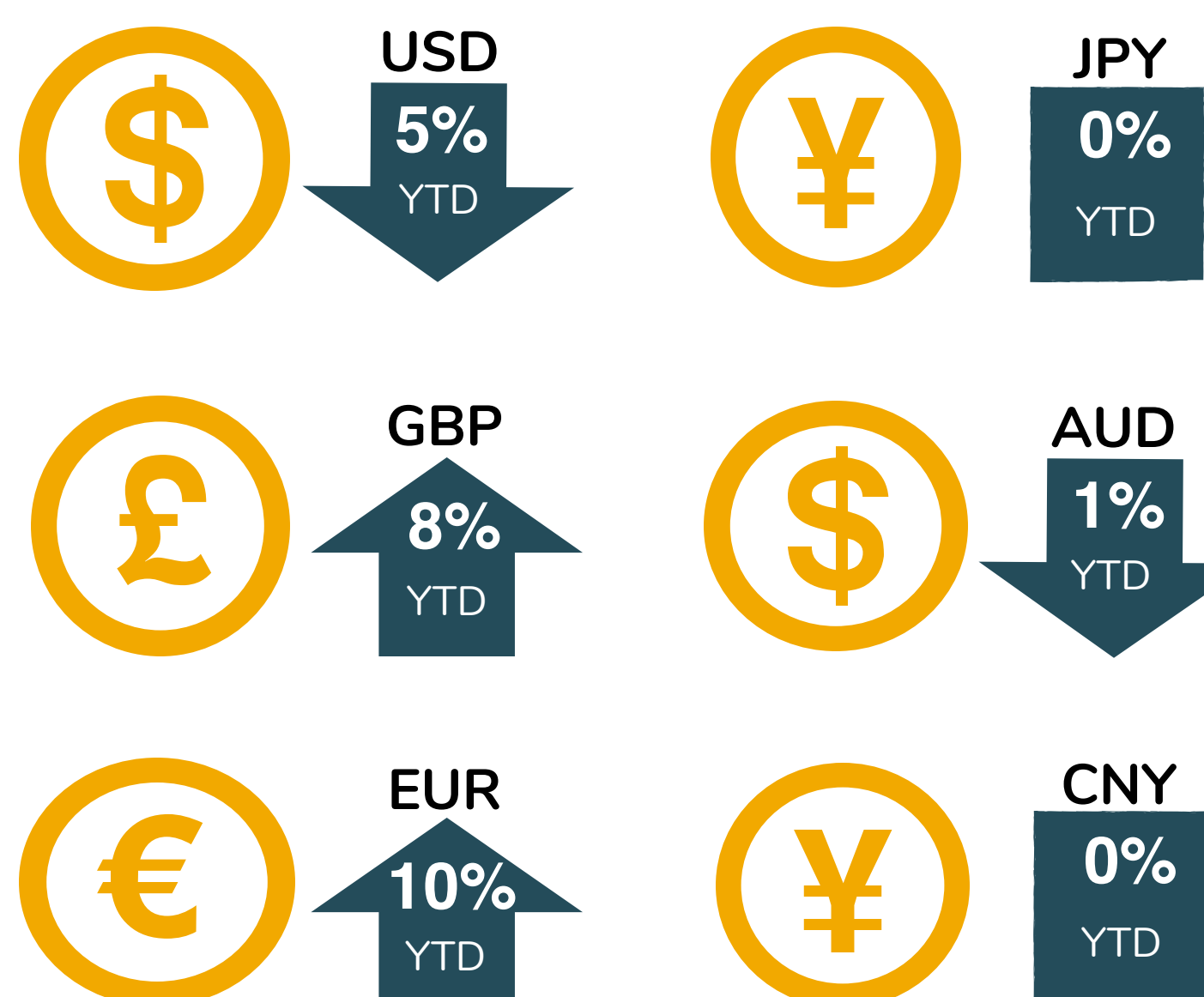
#### Same Day International Border Crossings (Into Yukon)



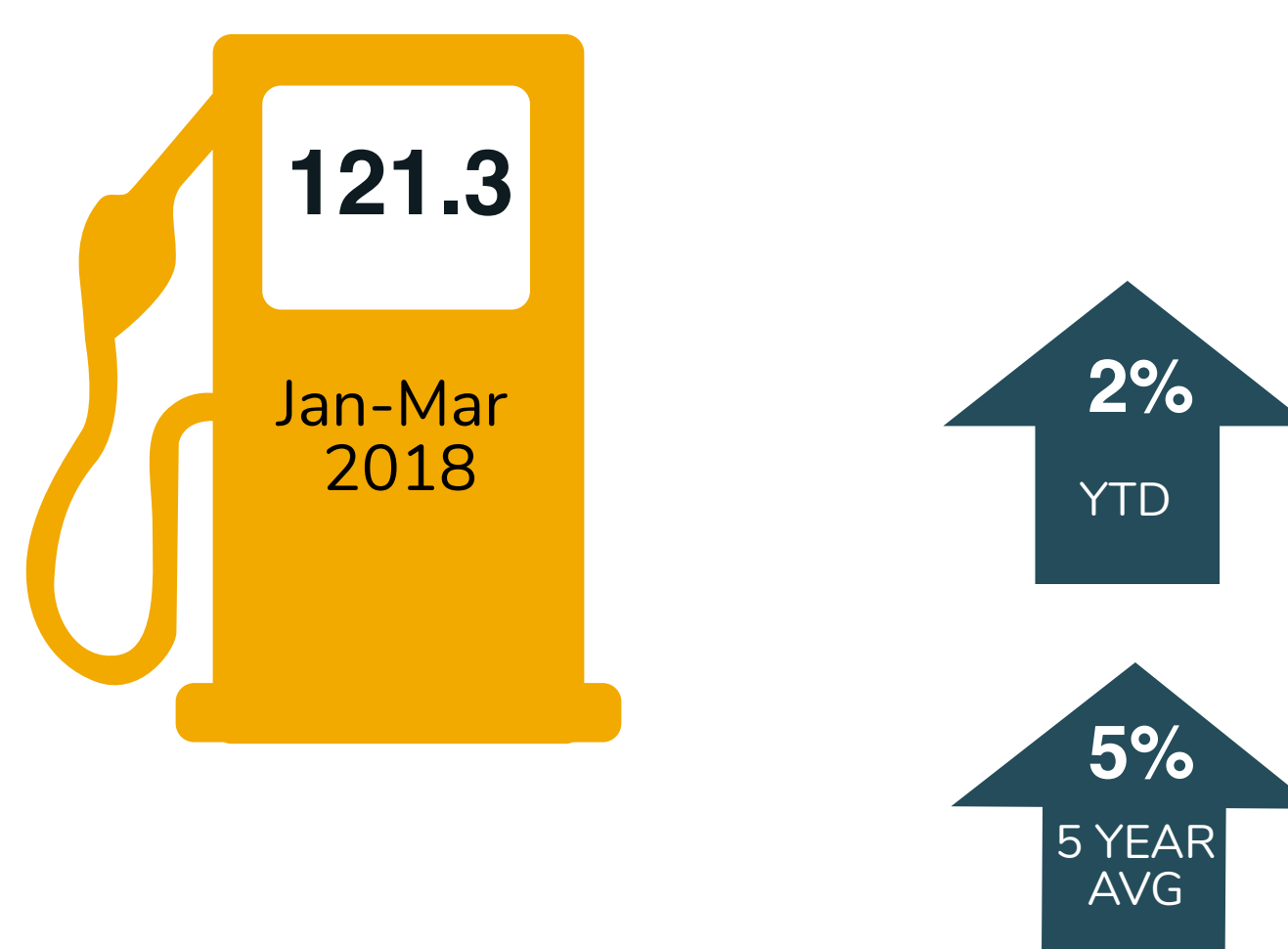
#### Retail Sales (Total \$000)



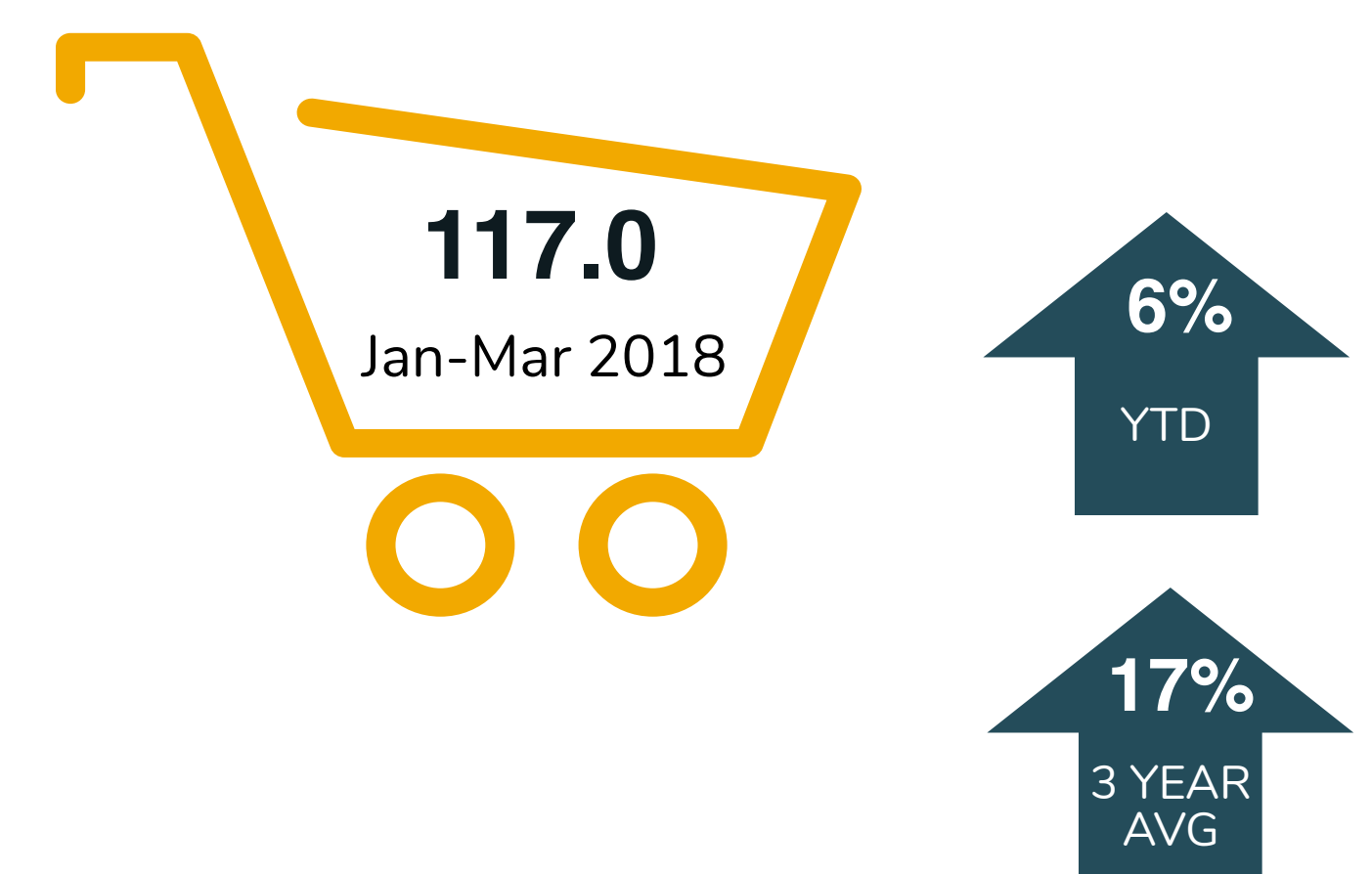
#### Exchange Rates (For CAD)



#### Average cost per litre of regular self-serve gasoline in Whitehorse



#### Consumer Confidence in Canada



Source: Government of Yukon Socio-Economic Web Portal, Motor Fuel Prices (Whitehorse)

Source: Conference Board of Canada, Index of Consumer Confidence

# Yukon Tourism Visitation Report

## Jan - Mar 2018

### Year-to-date vs. 5 Year Average

#### International Overnight Visitation (1+ Nights)

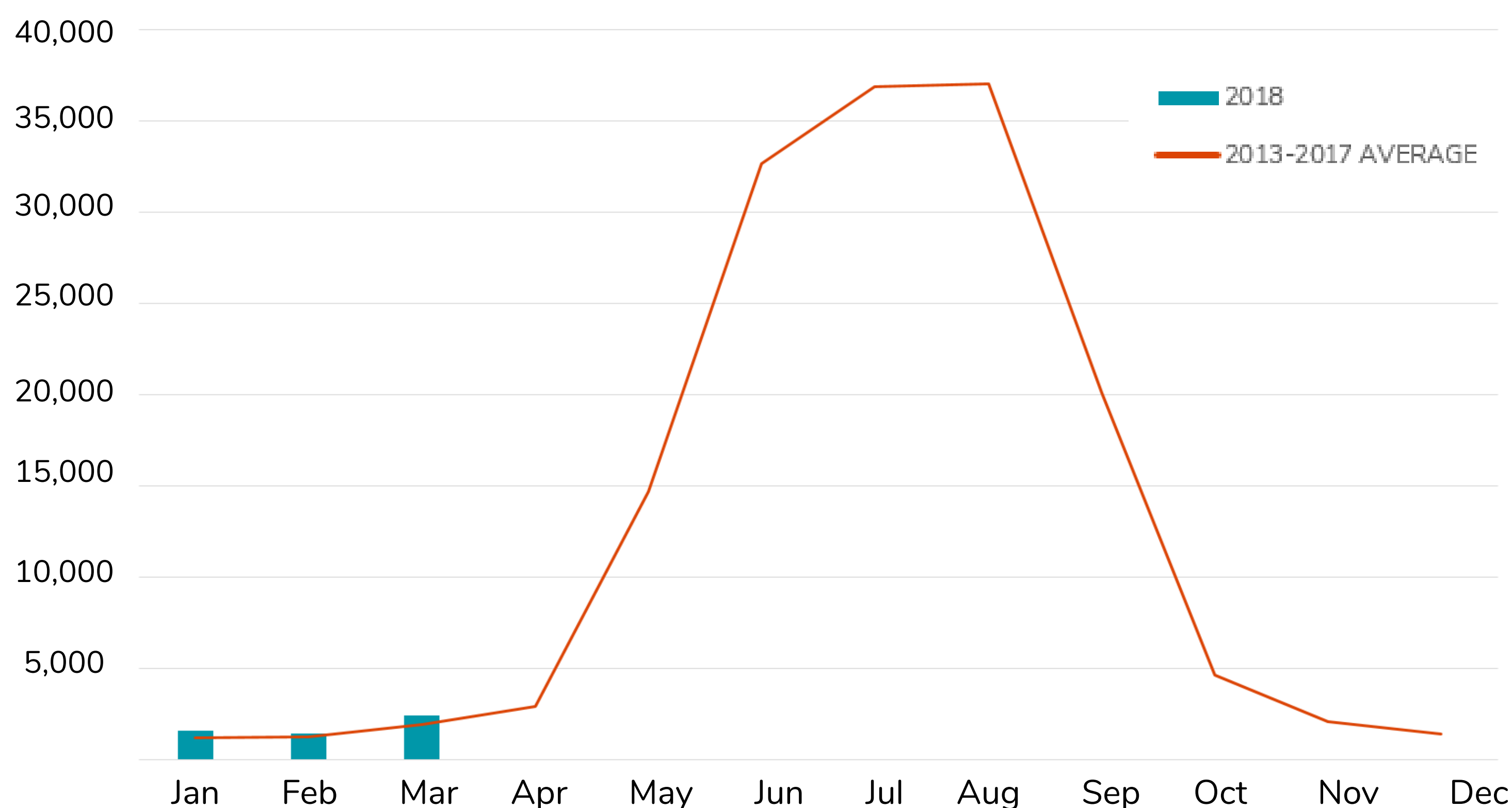
First quarter (Q1) overnight visitation for international visitors is 20% higher than the same period in 2017.

The month of January saw an increase of 35% in overnight visitation compared to the 5 year average (2013-2017).

Q1 overnight visitations is 26% higher than the 5 year average.

Source: Statistics Canada, CANSIM 427-0004.

American and Overseas visitors only, no Canadian visitors are included.



#### Air Arrivals at Erik Neilson Whitehorse International Airport

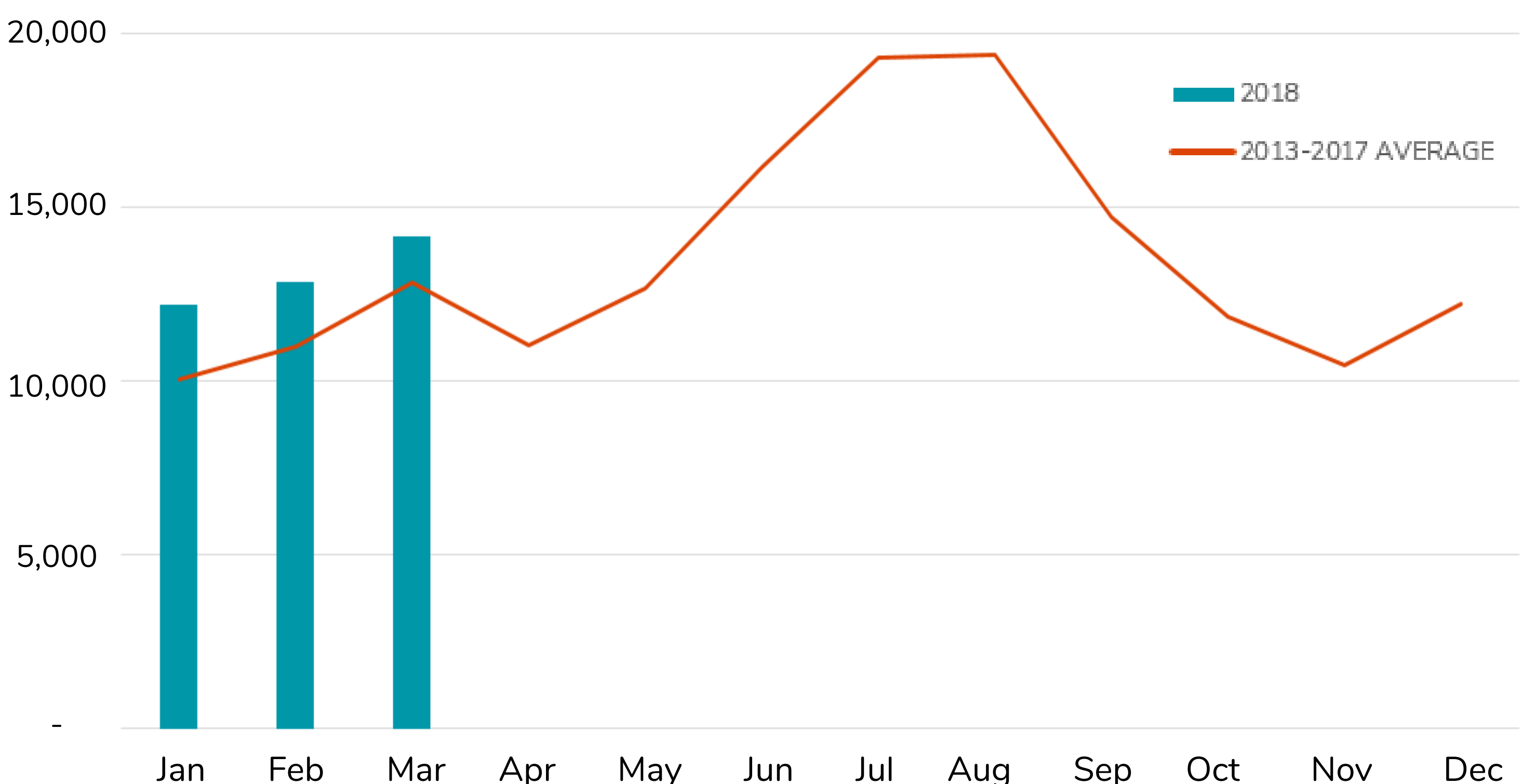
Q1 air arrivals have grown by 6% or 2,000 more passengers than in 2017.

Over the last 5 years, air arrivals have grown by 29% or 8,800 more passengers than 2014.

First quarter performance is 16% higher than the 5 year average (2013-2017).

Source: Government of Yukon, HPW.

Includes business, pleasure and local air passenger arrivals.



#### Occupancy at Select Fixed Roof Accommodation

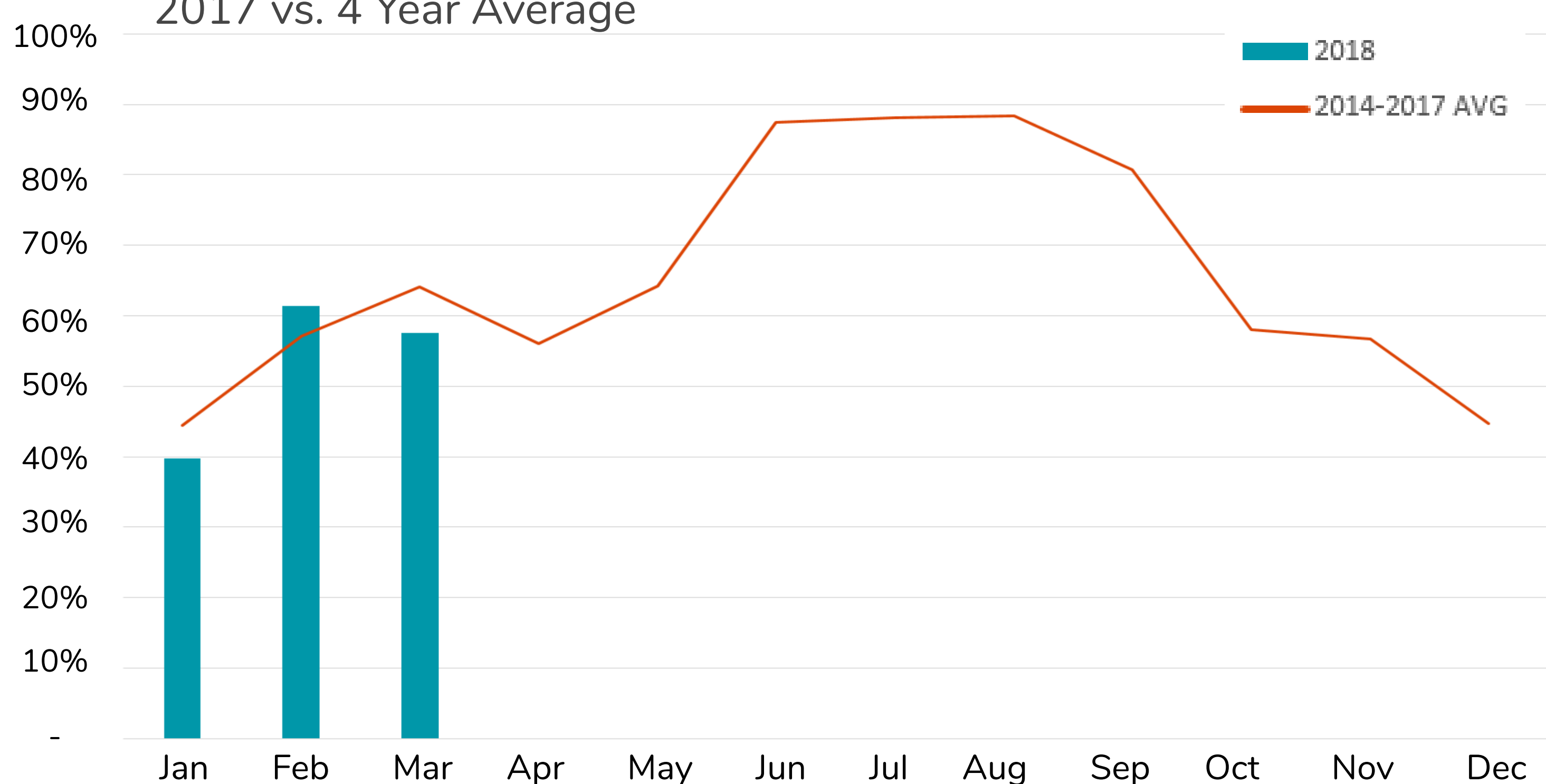
Q1 occupancy is 1.6 points lower than the 4 year average\* (2014-2017).

YTD Yukon occupancy rates are 4.2 points lower than national rates (57.2%).

Source: Canadian Tourism Research Institute, Hotels Trends in the Hotel Industry National Market Report; YBS, Monthly Statistics Review.

Figures represent approximately 500 rooms in Yukon and should not be generalized to the whole accommodation market. Figures are presented as an indicator only. \*2012-2013 data unavailable.

#### 2017 vs. 4 Year Average



# Yukon Tourism Visitation Report

## Jan - Mar 2018

### International Border Crossings (Into Yukon)

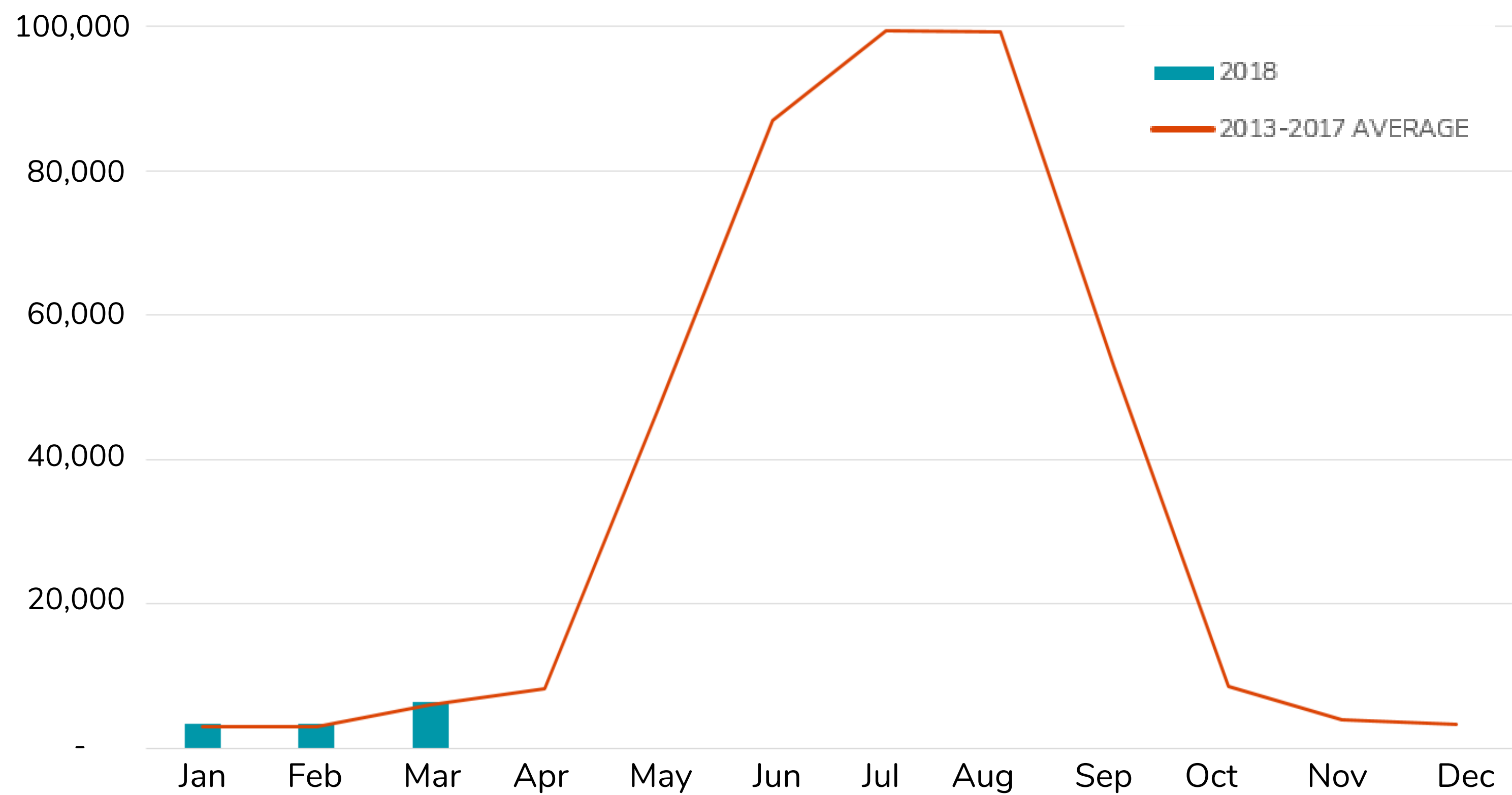
Q1 border crossings are 13% higher than in 2017.

The month of March saw a 30% increase in border crossings compared to 2017.

YTD crossings through Canadian Border Services Agency ports of entry are 10% higher than the 5 year average (2013-2017).

Source: Statistics Canada, CANSIM 427-0001.

Excludes travellers entering Yukon via BC on the South Alaska or Stewart-Cassiar Highways, the NWT on the Dempster Highway or on domestic flights. Total includes Yukoners.



### Same Day International Border Crossings (Into Yukon)

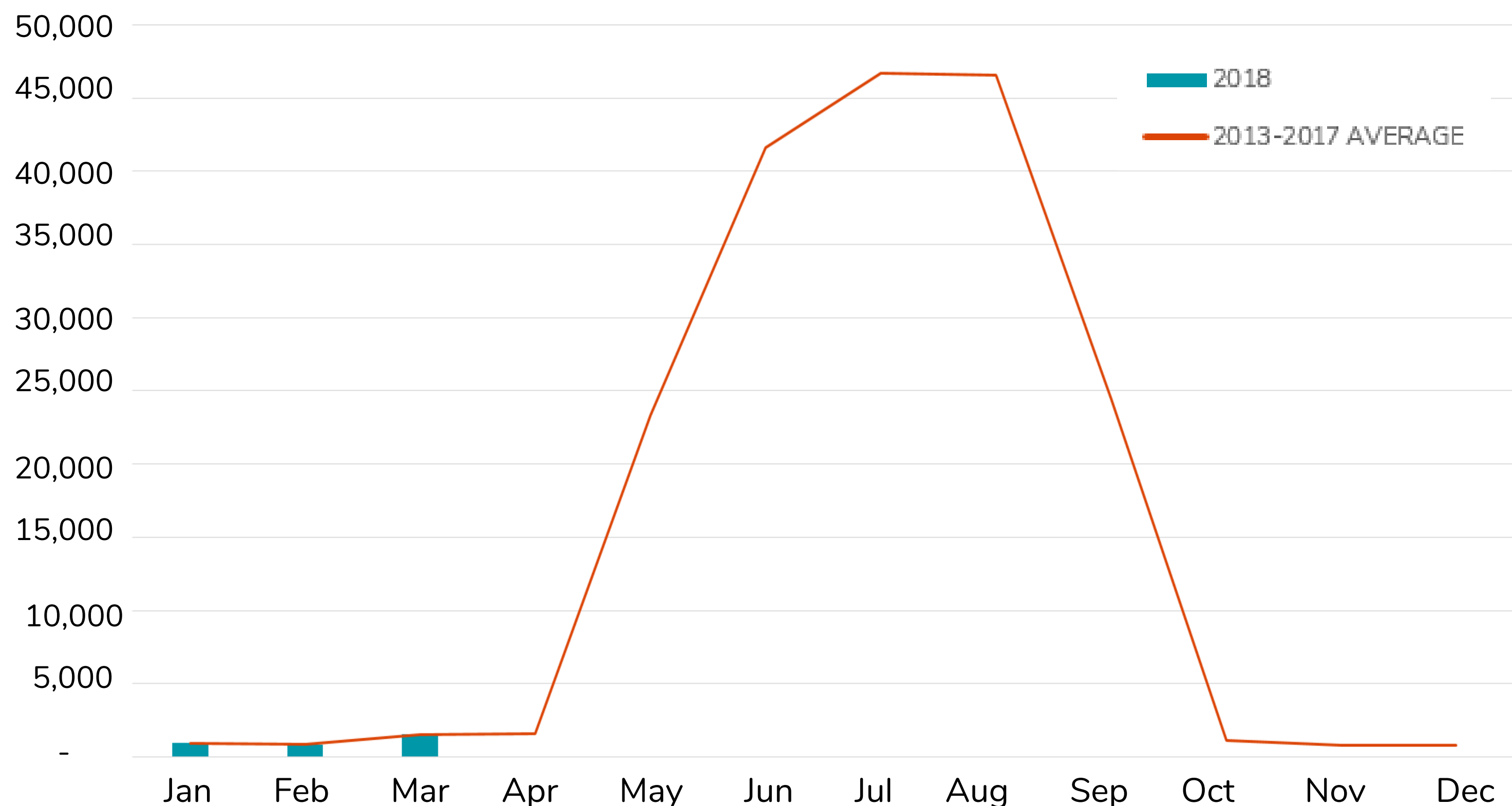
Q1 same day border crossings are 14% higher than 2017.

The month of March saw a 19% increase in same day border crossings compared to 2017.

Q1 same day border crossings are 1% higher than the 5 year average.

Source: Statistics Canada, CANSIM 427-0001.

Excludes travellers entering Yukon via BC on the South Alaska or Stewart-Cassiar Highways, the NWT on the Dempster Highway or on domestic flights.



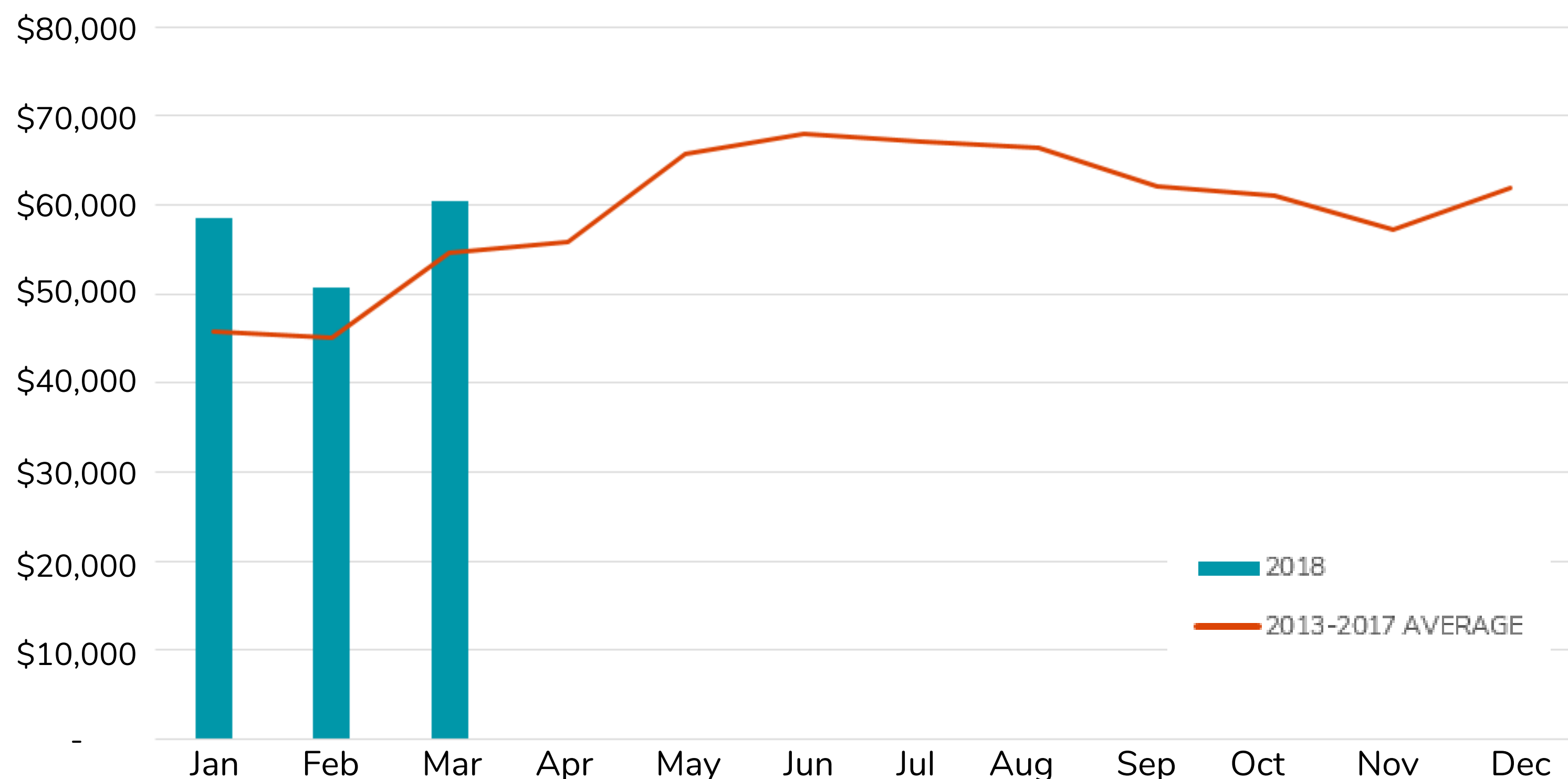
### Retail Sales (Total Sales \$000)

Q1 retail sales are up 7% (\$10 million) from the same period in 2017.

Q1 retail sales are up 17% compared to the 5 year average (2013-2017).

Comparatively, national retail sales have increased 4% YTD.

Source: Statistics Canada, CANSIM 080-0020.



# 2017 Year-to-date

Year-to-date (YTD)		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
		2018	2018	2018	2018	2018	2018	2018	2018	2018	2018	2018	2018
		% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change	% YOY Change
<b>OVERNIGHT VISITATION, by Origin<sup>1</sup></b>													
Total	5,450	20%	1,588	18%	1,428	11%	2,434	27%	2,335	32%	99	-32%	
US	5,269	24%	1,557	19%	1,377	15%	2,335	32%	99	-32%			
Overseas	181	-36%	31	-30%	51	-45%							
<b>AIR ARRIVALS AT ERIK NELSON WHITEHORSE INTERNATIONAL AIRPORT<sup>2</sup></b>													
Arrivals	39,199	6%	12,195	6%	12,848	11%	14,156	0%					
<b>OCCUPANCY AT SELECT FIXED ROOF ACCOMMODATIONS<sup>3</sup></b>													
Occupancy	53.0%	-4.2	39.8%	-6.4	61.4%	-1.5	57.6%	-4.8					
<b>INTERNATIONAL BORDER CROSSINGS (INTO YUKON)<sup>4</sup></b>													
Total	13,418	13%	3,473	2%	3,441	1%	6,504	30%					
US	8,448	19%	2,454	17%	2,195	12%	3,799	26%					
CAN	4,958	12%	1,239	-1%	1,171	-13%	2,548	40%					
Other	282	-4%	50	-7%	75	-23%	157	-11%					
<b>SAME DAY INTERNATIONAL BORDER CROSSINGS (INTO YUKON)<sup>5</sup></b>													
Total	3,280	1.4%	916	13%	842	8%	1,522	19%					
<b>RETAIL SALES (\$000)<sup>6</sup></b>													
Total	\$169,647	7%	\$58,526	19%	\$50,737	5%	\$60,384	-2%					

\*YOY = Year-over-year variance. For Quarter 1 this is comparing Q1 2018 to Q1 2017.

<sup>1</sup> Source: Canadian Tourism Research Institute. Excludes Canadian visitors. <sup>2</sup> Source: Government of Yukon, HPW. Includes local air passenger arrivals. <sup>3</sup> Source: Canadian Tourism Research Institute. Figures represent approx. 500 rooms in Yukon only.

<sup>4</sup> Source: Statistics Canada, CANSIM 427-0001. Excludes travellers entering Yukon via BC by land, the NWT by land or domestic flights. <sup>5</sup> Source: Statistics Canada, CANSIM 080-0020.