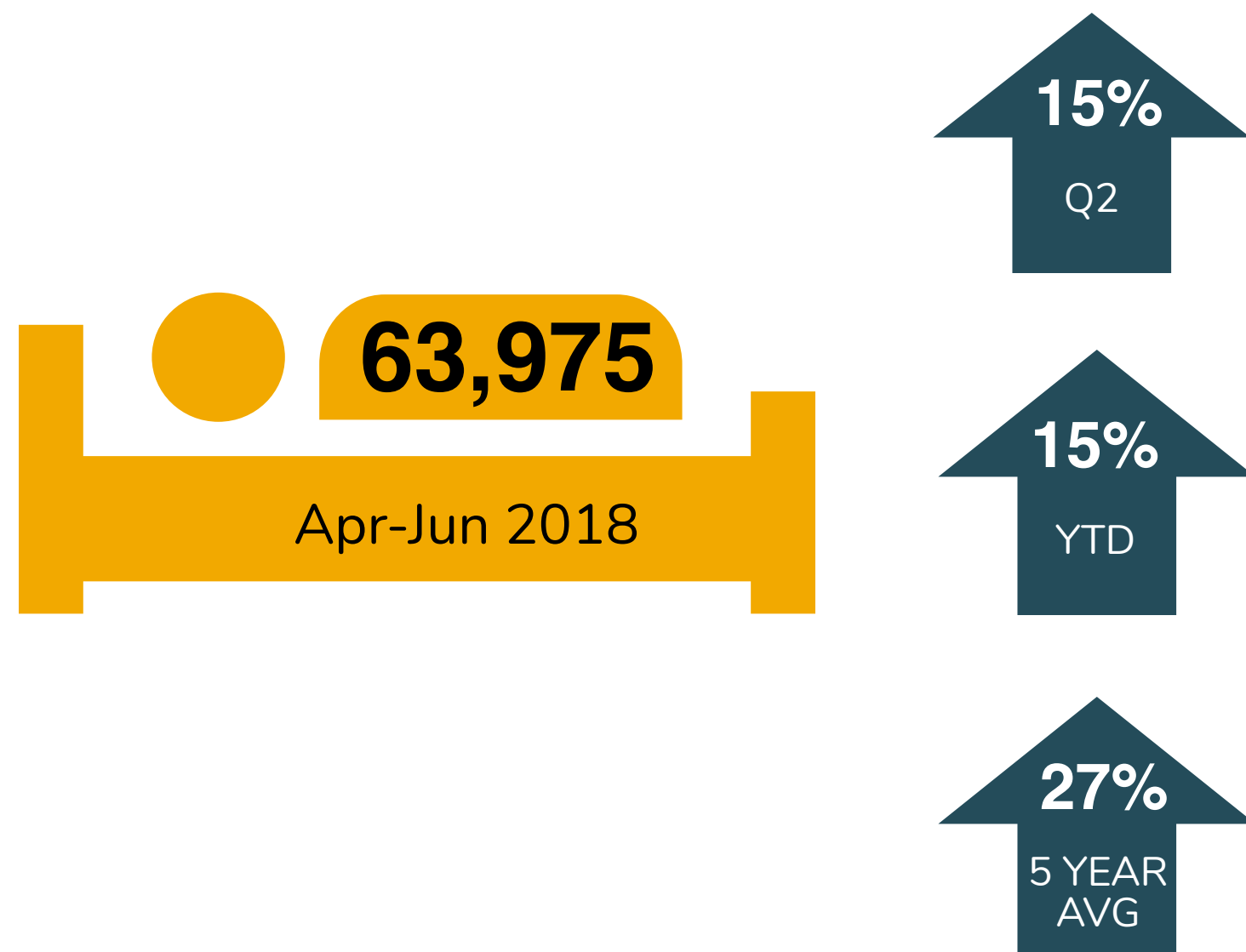


# Yukon Tourism Visitation Report

## Jan-Jun 2018

### Q2 Highlights

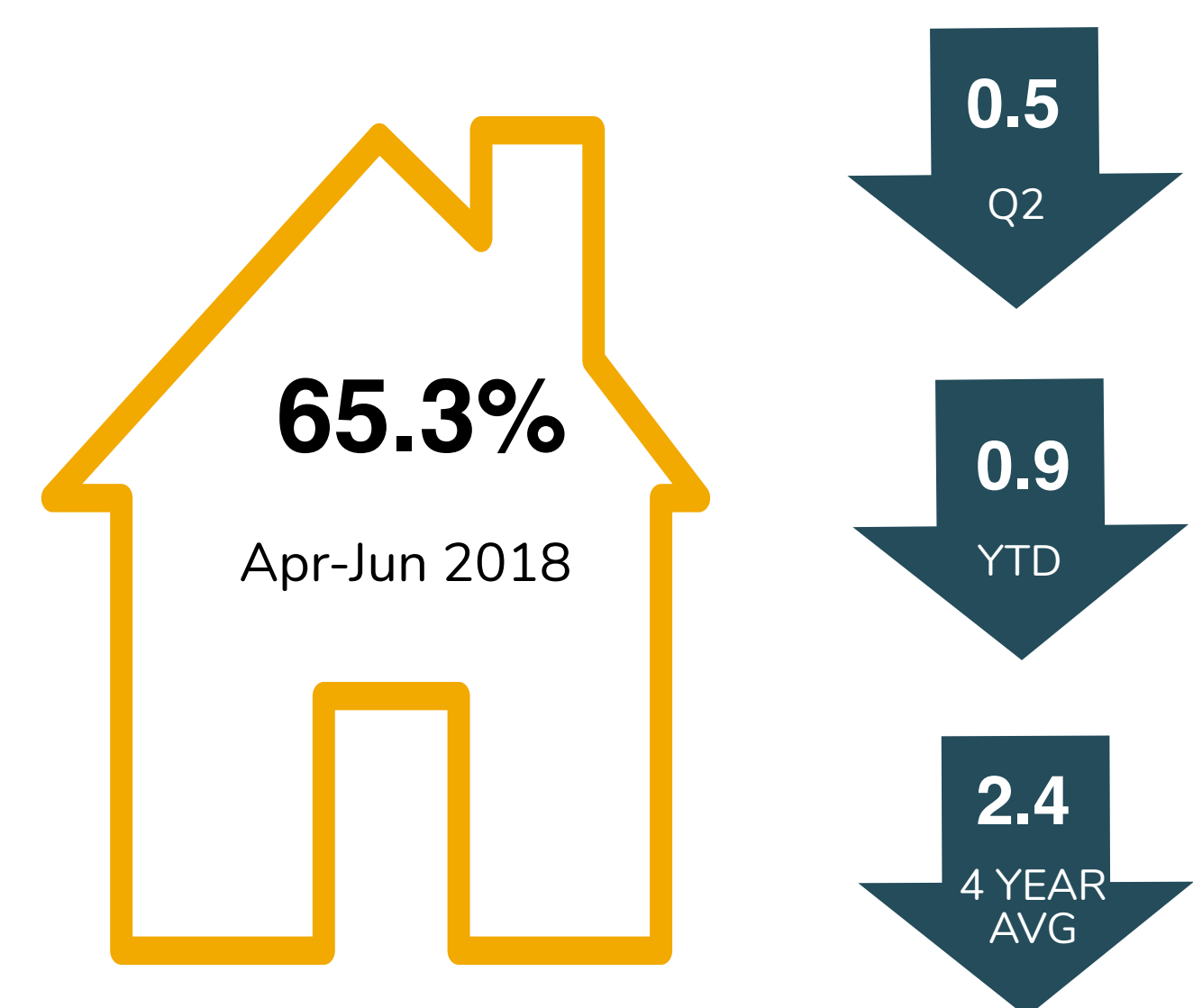
#### International Overnight Visitation (1+ Nights)\*



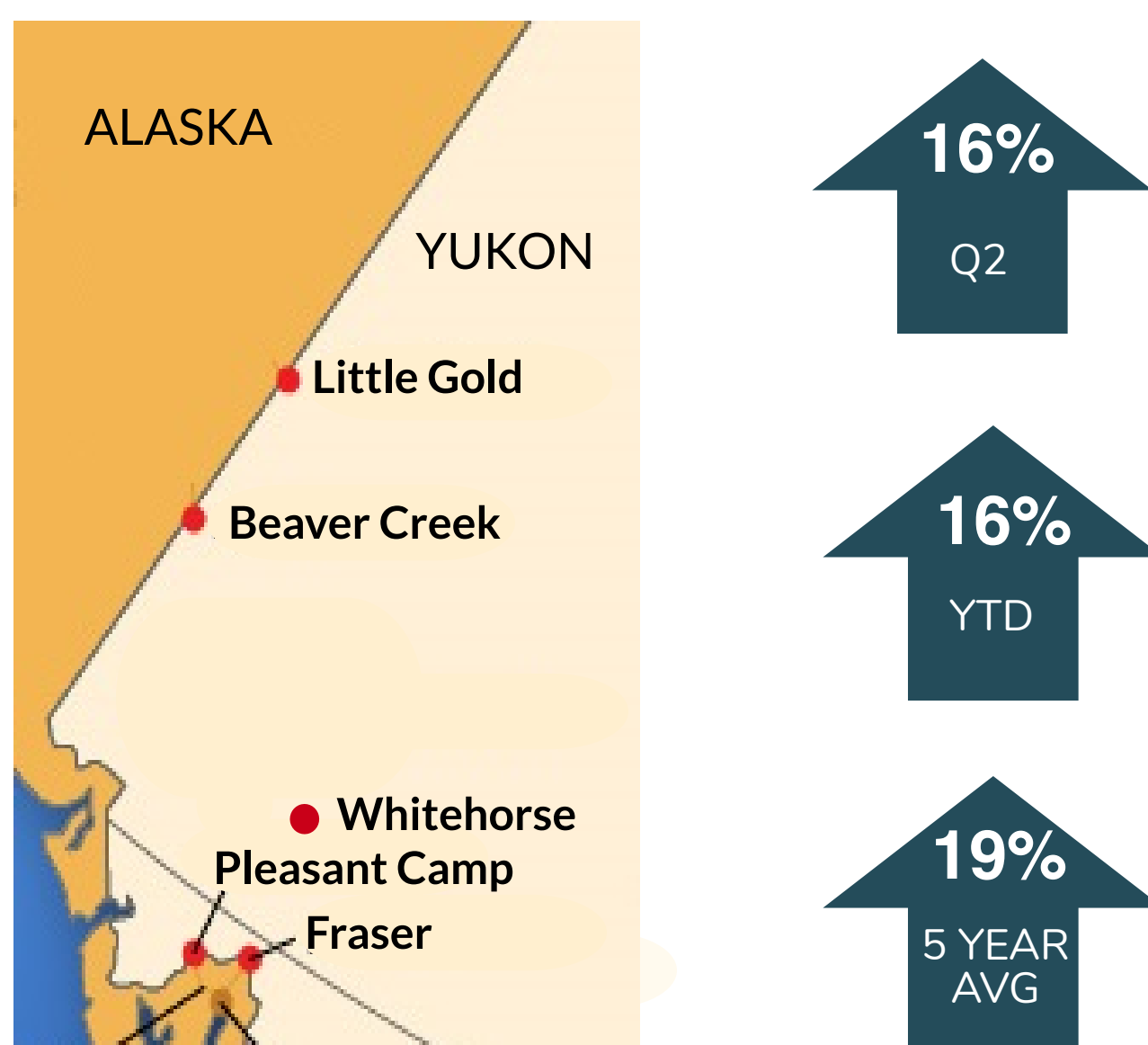
#### Air Arrivals at Erik Nielson Whitehorse International Airport



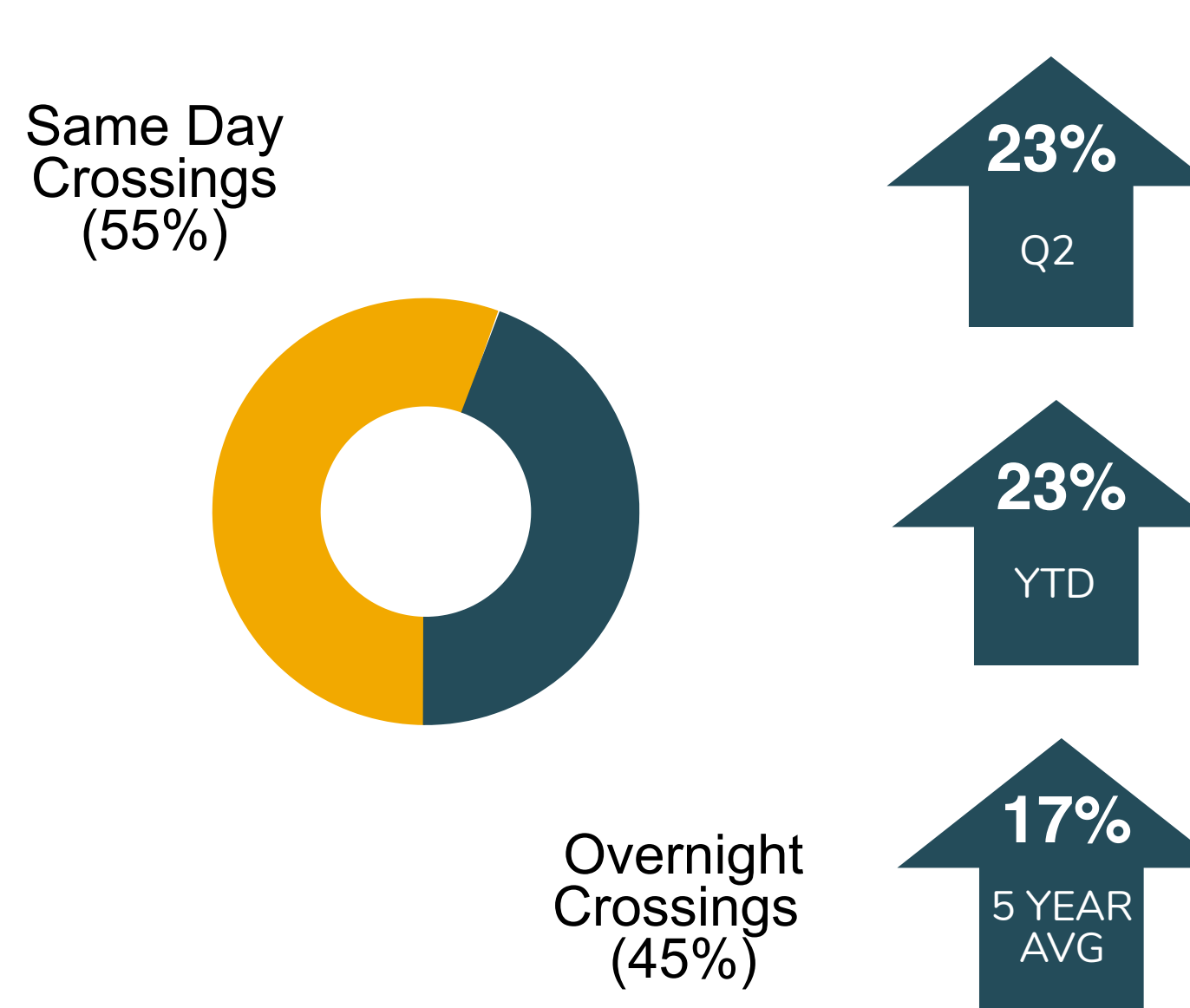
#### Occupancy at Select Fixed Roof Accommodations



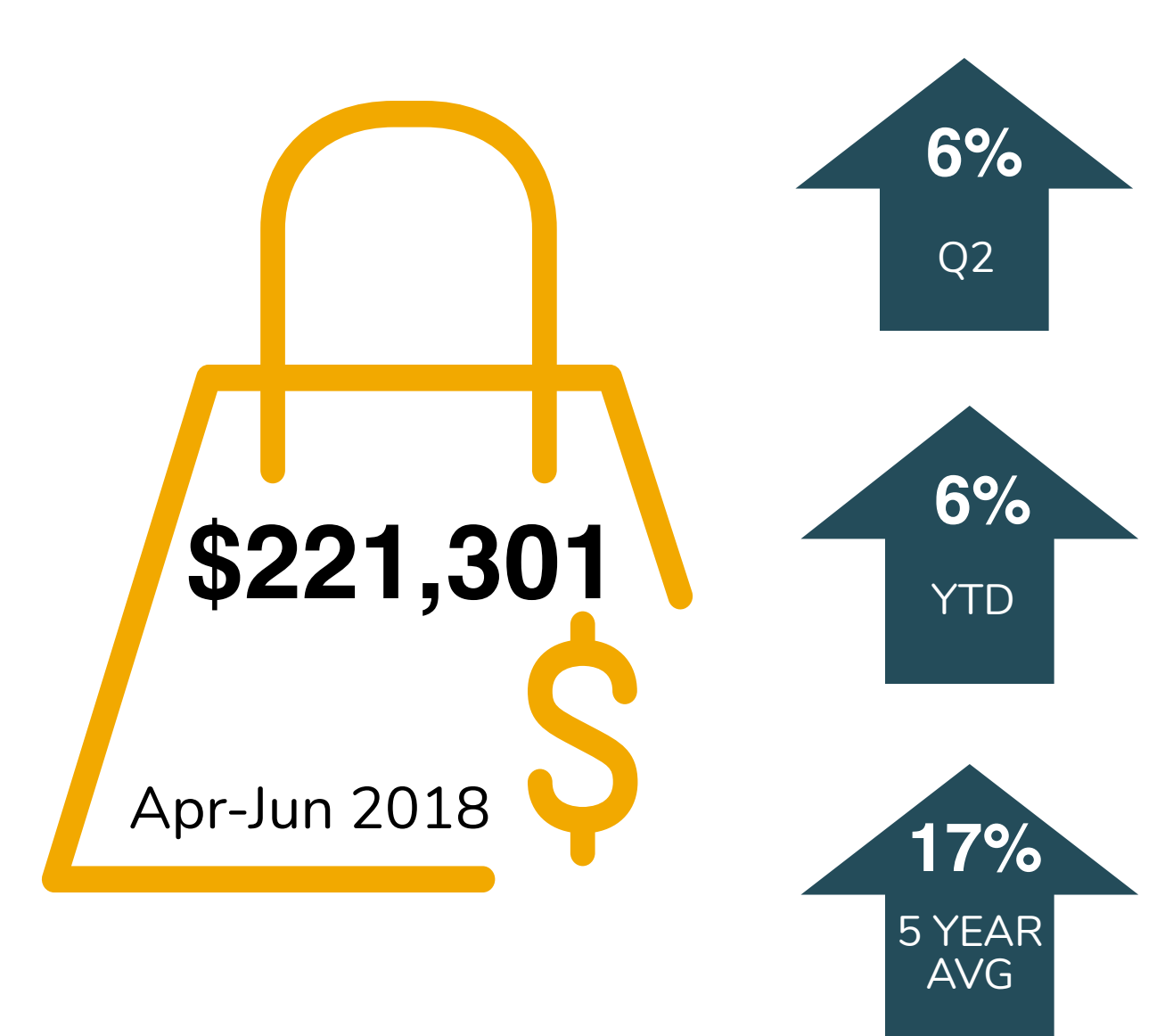
#### International Border Crossings (Into Yukon)\*



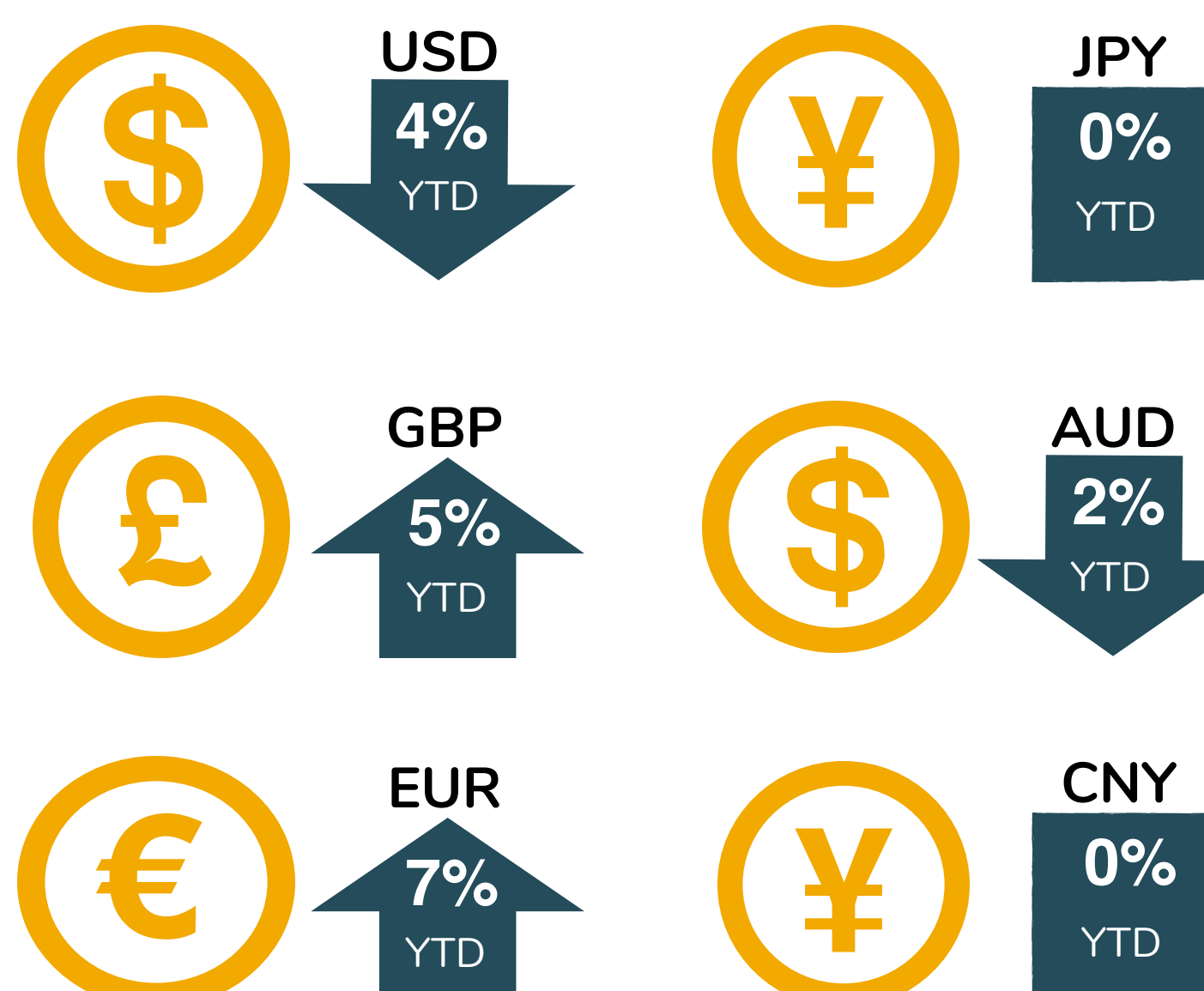
#### Same Day International Border Crossings (Into Yukon)\*



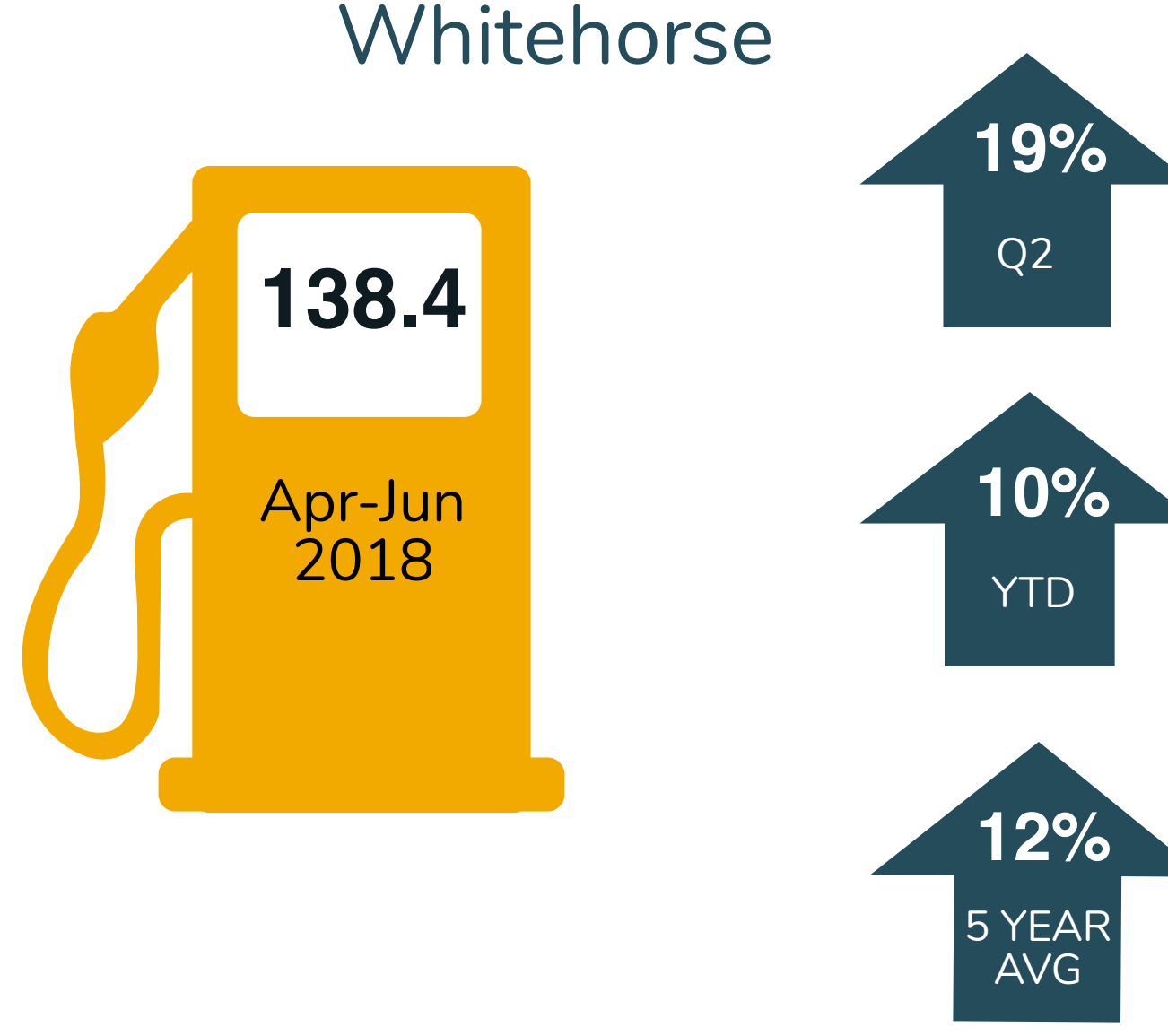
#### Retail Sales (Total \$000)



#### 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

\*Statistics Canada is reviewing Yukon data, which may result in adjustments.

# Yukon Tourism Visitation Report

## Jan-Jun 2018

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

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

Year-to-date (YTD) overnight visitation for international visitors is 15% higher than the same period in 2017.

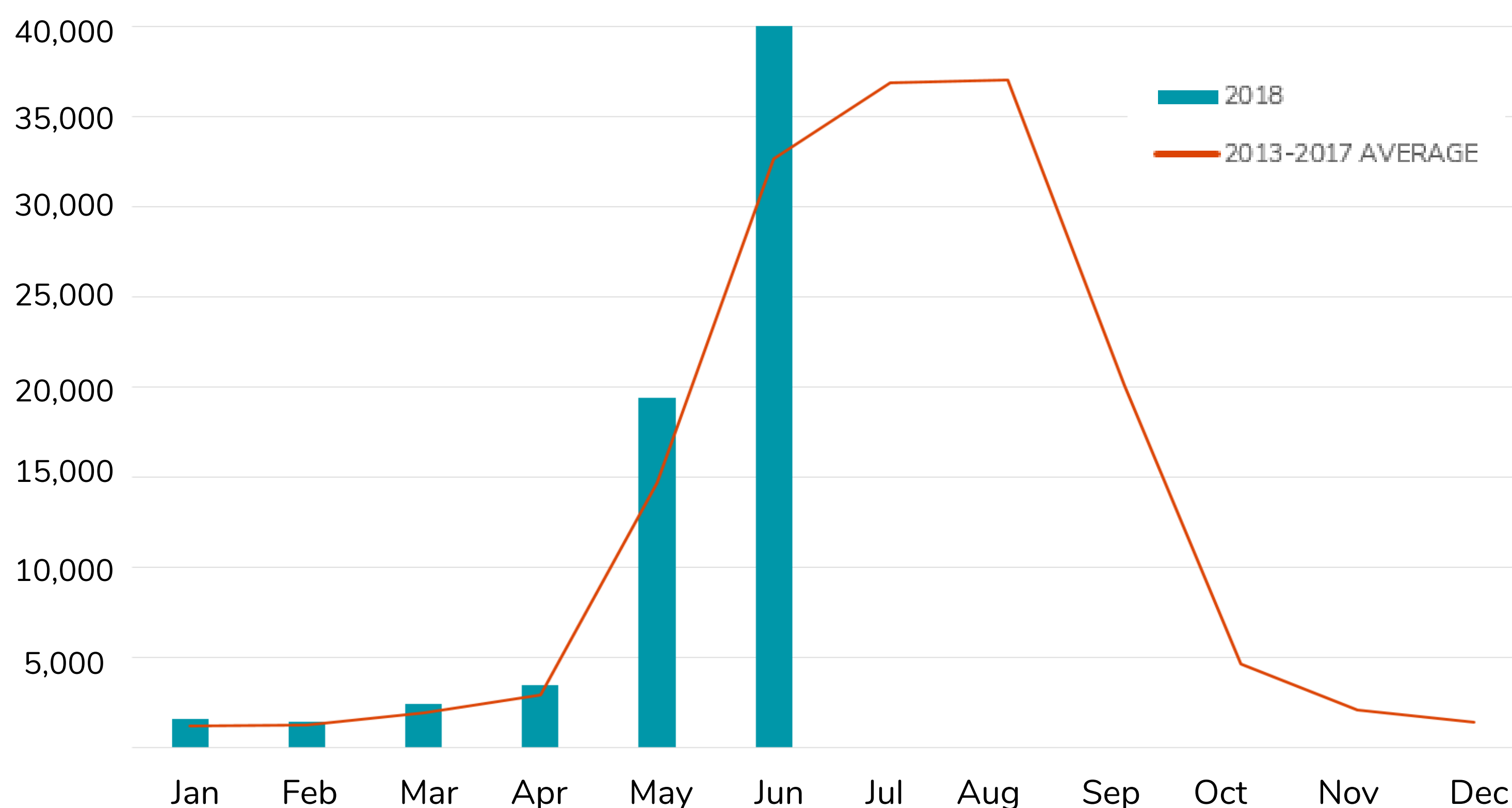
The month of May saw an increase of 32% in overnight visitation compared to the 5 year average (2013-2017).

YTD overnight visitations is 27% higher than the 5 year average.

Source: Statistics Canada, CANSIM 427-0004.

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

\*Statistics Canada is reviewing Yukon data, which may result in adjustments.



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

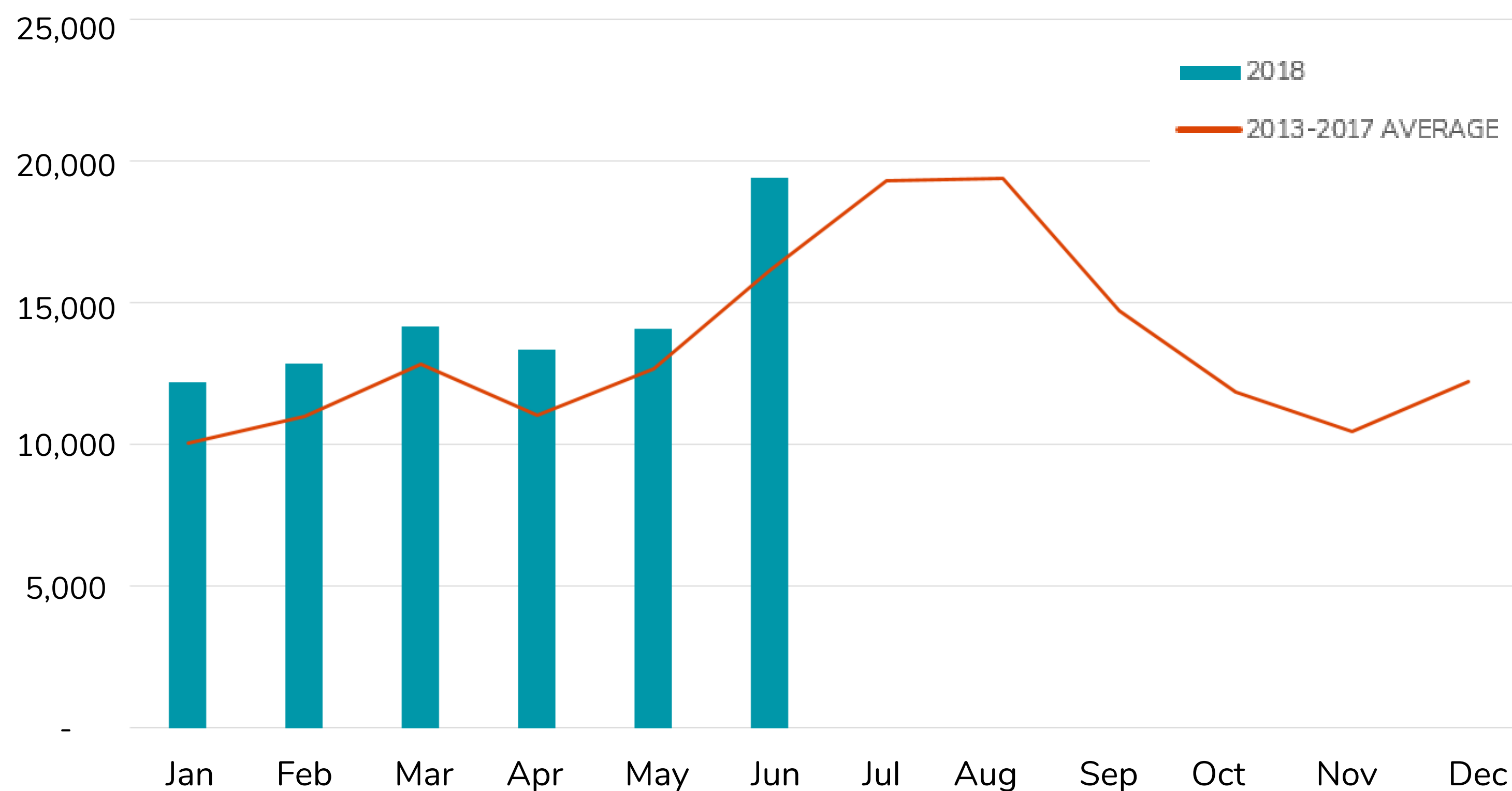
YTD air arrivals have grown by 4% or 3,500 more passengers than in 2017.

Over the last 5 years, air arrivals have grown by 28% or 18,500 more passengers than 2014.

Second quarter performance is 18% 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<sup>ii</sup>

YTD occupancy is 0.9 points lower than the same period in 2017.

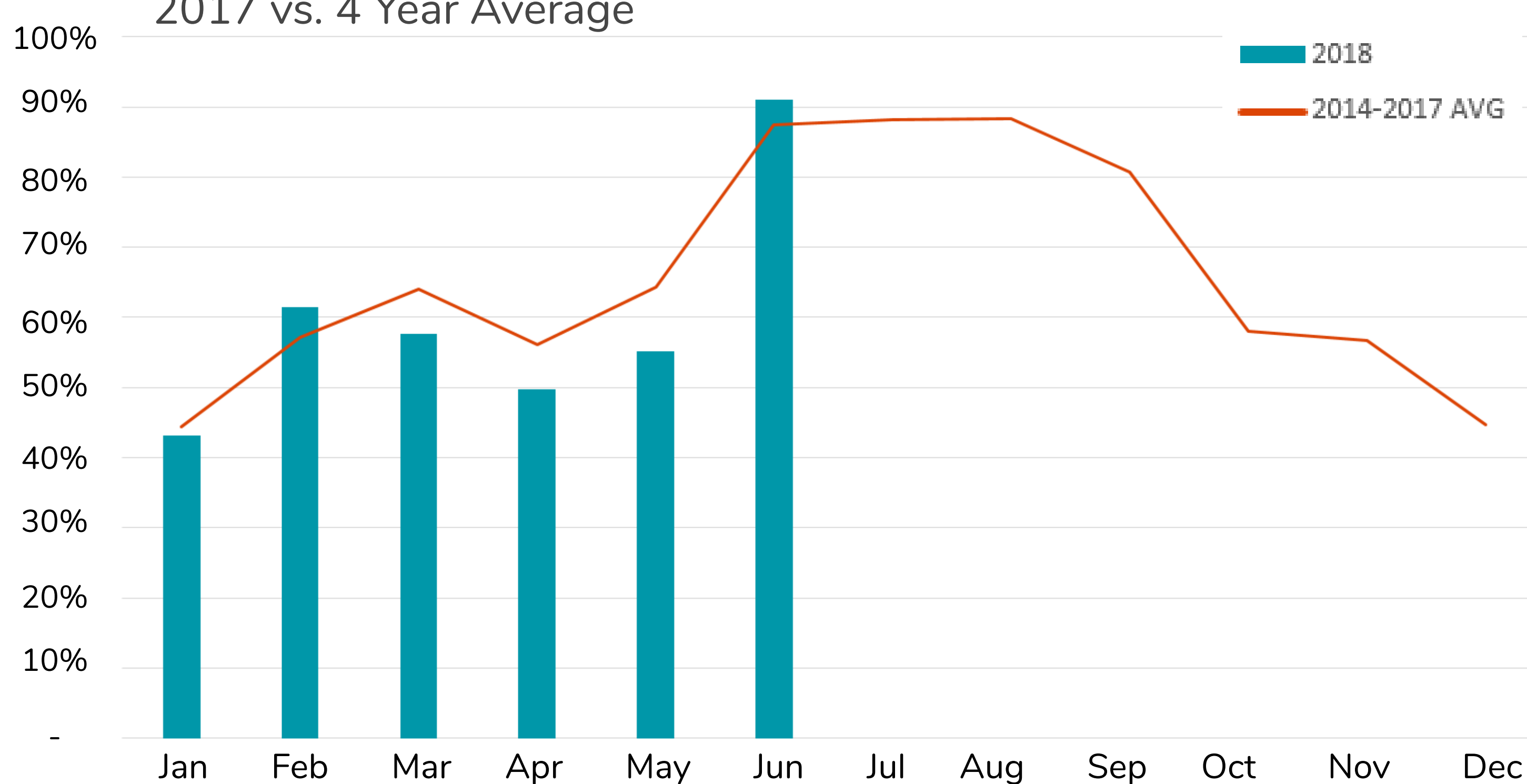
YTD Yukon occupancy rates are 3.6 points lower than national rates (62.9%).

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

Figures represent approximately 600 rooms in Yukon and should not be generalized to the whole accommodation market. Figures are presented as an indicator only.

<sup>ii</sup> Due to increases in CBRE inventory, 2017-18 data is not directly comparable to previous years.

#### 2017 vs. 4 Year Average



# Yukon Tourism Visitation Report

## Jan-Jun 2018

### International Border Crossings (Into Yukon)\*

YTD border crossings are 16% higher than in 2017.

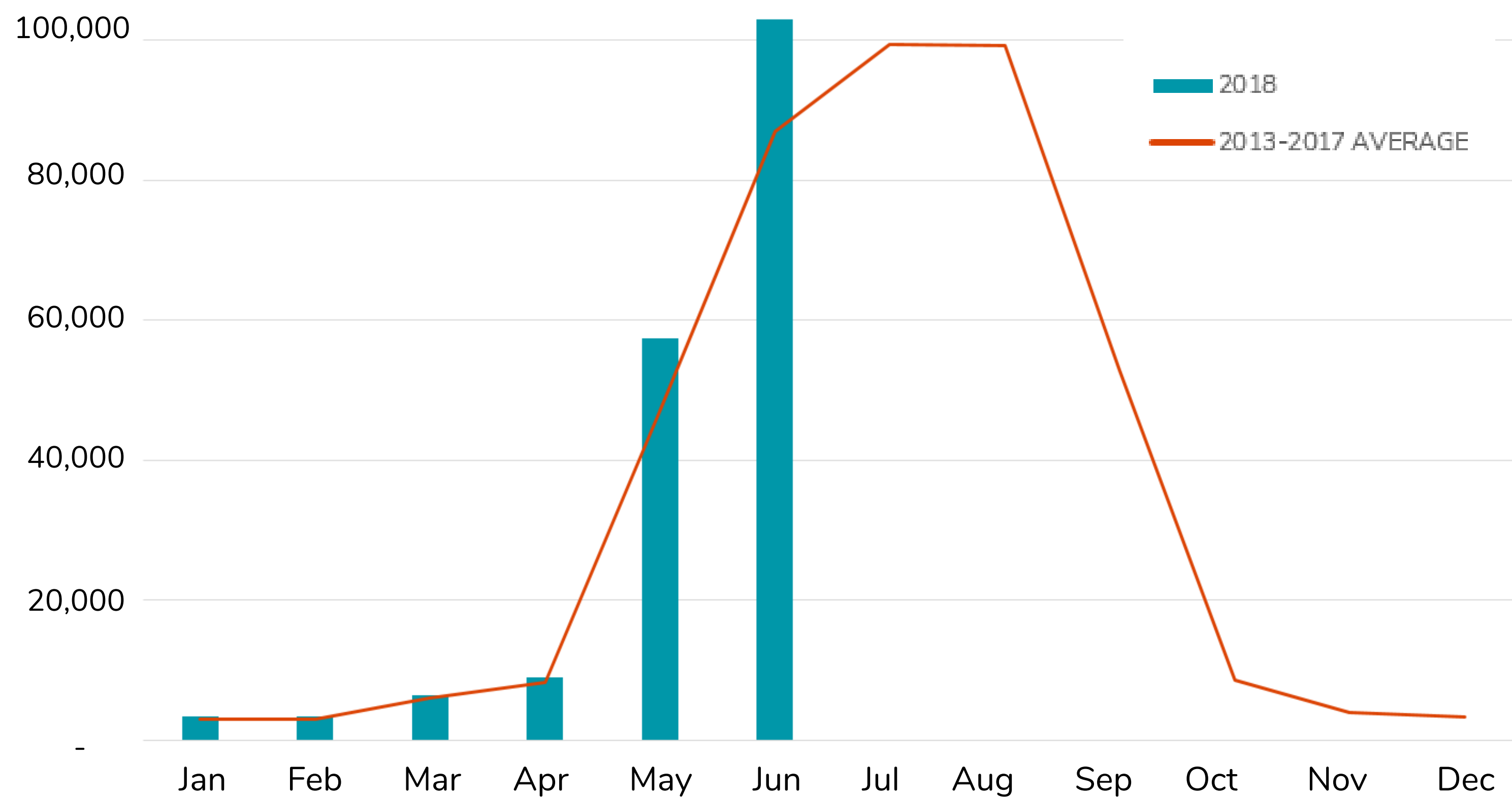
The month of May saw a 23% increase in border crossings compared to 2017.

YTD crossings through Canadian Border Services Agency ports of entry are 18% higher than the 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.

\*Statistics Canada is reviewing Yukon data, which may result in adjustments.



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

YTD same day border crossings are 23% higher than 2017.

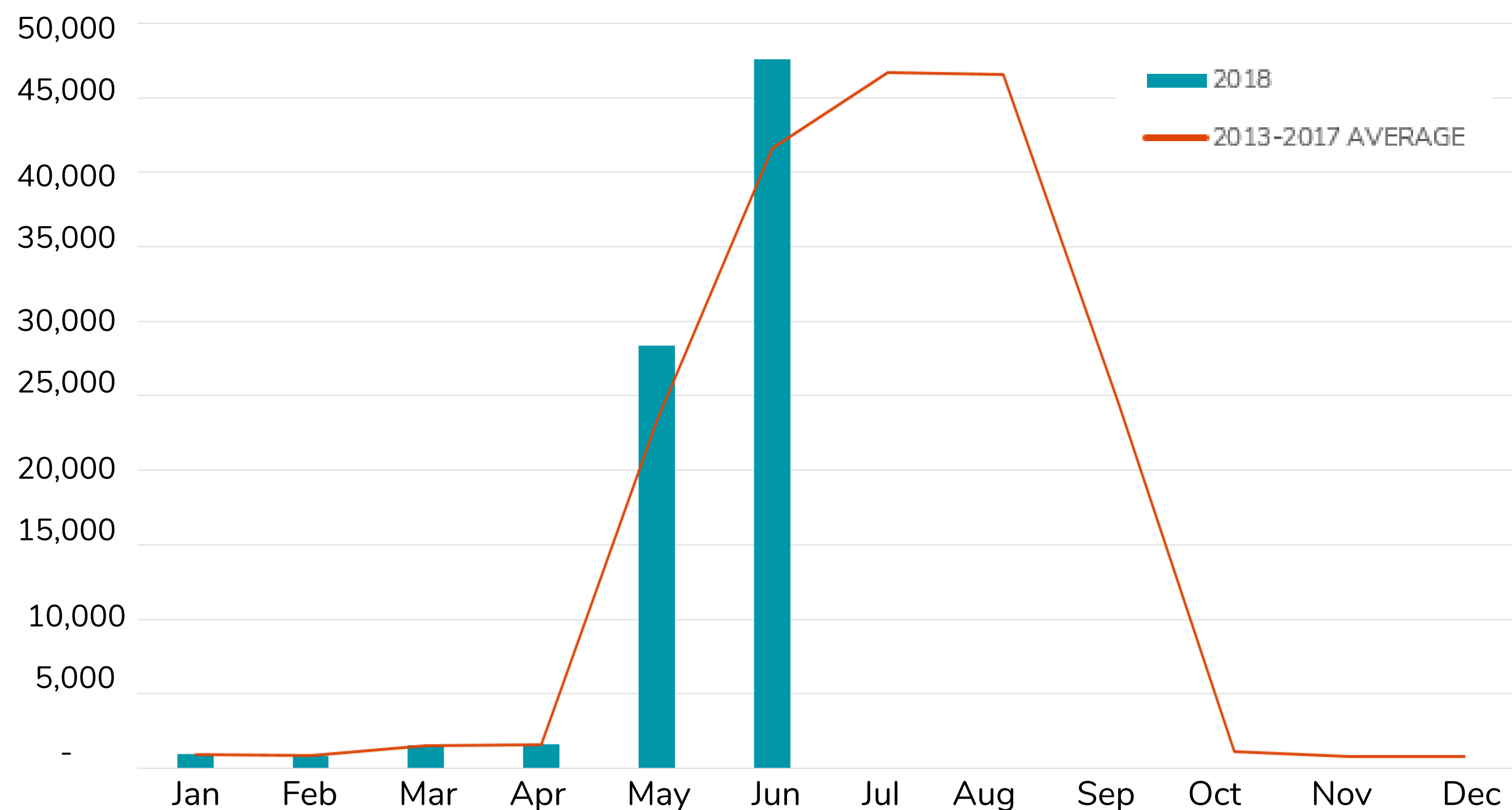
The month of May saw a 37% increase in same day border crossings compared to 2017.

YTD same day border crossings are 16% 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.

\*Statistics Canada is reviewing Yukon data, which may result in adjustments.



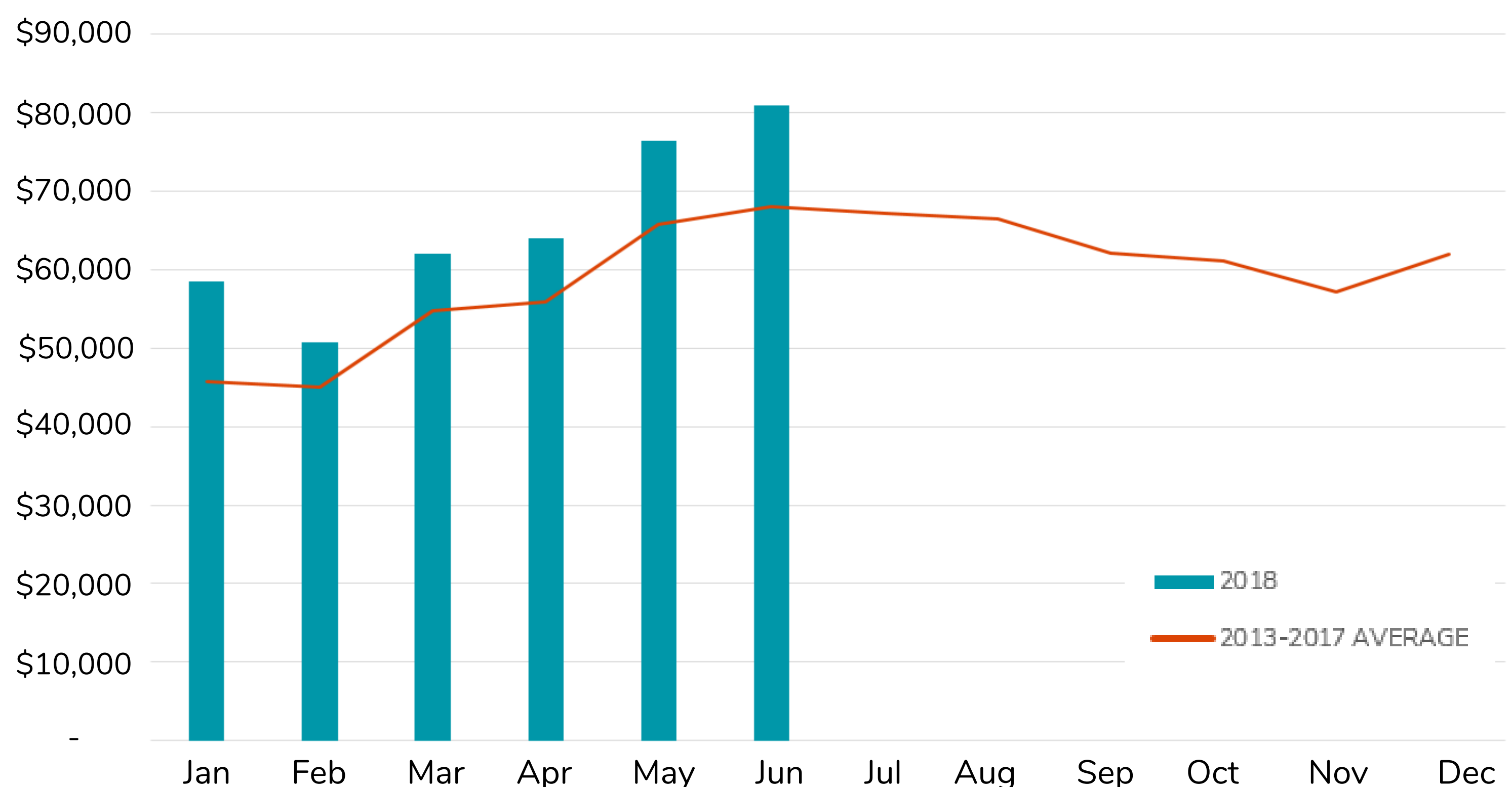
### Retail Sales (Total Sales \$000)

YTD retail sales are up 6% (\$23.8 million) from the same period in 2017.

YTD 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	
% YOY*		% 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>1i</sup></b>														
Total	69,425	15%	1,588	18%	1,428	11%	2,434	27%	3,437	2%	19,369	17%	41,169	15%
US	54,451	18%	1,557	19%	1,377	15%	2,335	32%	3,257	2%	18,414	20%	37,211	18%
Overseas	5,274	-10%	31	-30%	51	-45%	99	-32%	180	3%	955	-17%	3,958	-7%
<b>AIR ARRIVALS AT ERIK NELSON WHITEHORSE INTERNATIONAL AIRPORT <sup>2</sup></b>														
Arrivals	86,022	4%	12,195	6%	12,848	11%	14,156	0%	13,341	3%	14,067	1%	19,415	5%
<b>OCCUPANCY AT SELECT FIXED ROOF ACCOMMODATIONS <sup>3ii</sup></b>														
Occupancy	59.3%	-0.9	43.2%	-3.1	61.4%	1.8	57.6%	-2.1	49.7%	-3.0	55.2%	-3.1	91.0%	5.0
<b>INTERNATIONAL BORDER CROSSINGS (INTO YUKON) <sup>4i</sup></b>														
Total	169,475	16%	3,473	2%	3,441	1%	6,504	30%	8,980	-12%	57,456	23%	103,039	16%
US	122,930	20%	2,454	17%	2,195	12%	3,799	26%	4,779	-2%	39,859	28%	78,292	18%
CAN	32,929	4%	1,239	-1%	1,171	-13%	2,548	40%	3,954	-22%	9,729	2%	14,288	13%
Other	18,820	12%	50	-7%	75	-23%	157	-11%	247	-11%	7,832	28%	10,459	4%
<b>SAME DAY INTERNATIONAL BORDER CROSSINGS (INTO YUKON) <sup>5i</sup></b>														
Total	80,809	23%	916	13%	842	8%	1,522	19%	1,589	-10%	28,358	37%	54,667	18%
<b>RETAIL SALES (\$000) <sup>6</sup></b>														
Total	\$392,619	6%	\$58,526	19%	\$50,737	5%	\$60,055	0%	\$64,052	5%	\$76,354	4%	\$80,895	7%

\*YOY = Year-over-year variance. For Quarter 2 this is comparing Q1 + Q2 2018 to Q1 + Q2 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: CBRE Trends in the Canadian Hotel Industry National Market Report. Figures represent approx.

600 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. <sup>6</sup> Adjusted, June 2018. <sup>7</sup> Statistics Canada is reviewing Yukon data, which may result in adjustments. <sup>8</sup> Due to increase in CBRE inventory, 2017-18 data is not directly comparable to previous years.