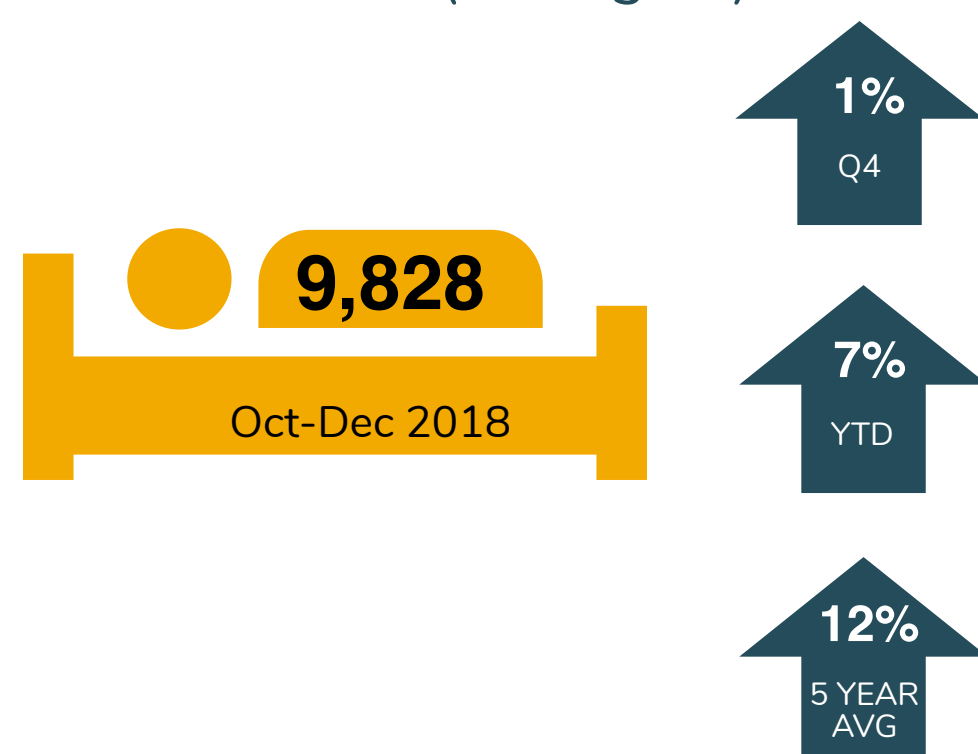


Yukon Tourism Visitation Report

Jan-Dec 2018

Q4 Highlights

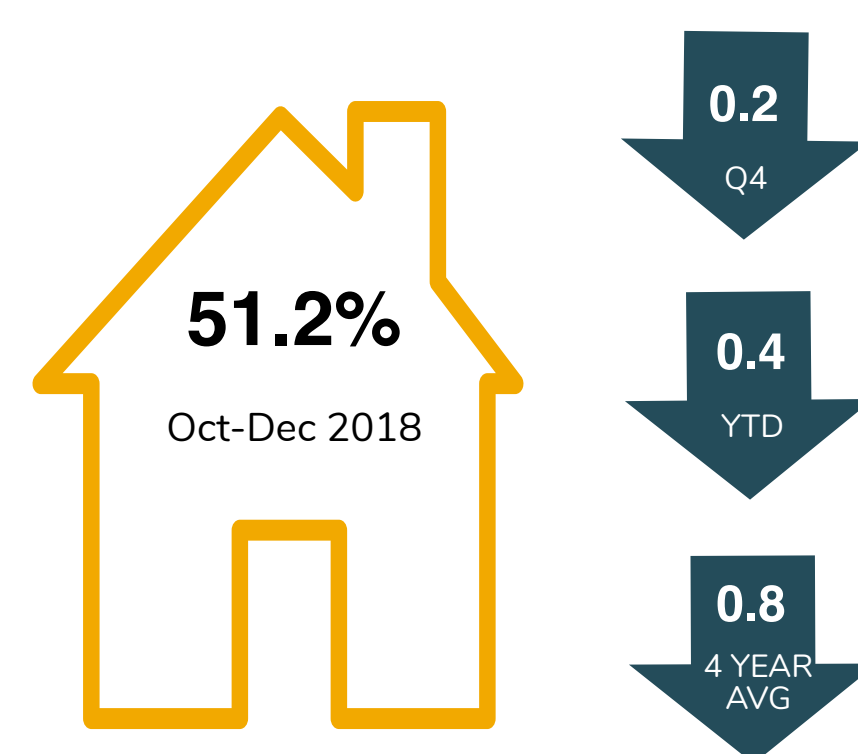
International Overnight Visitation (1+ Nights)



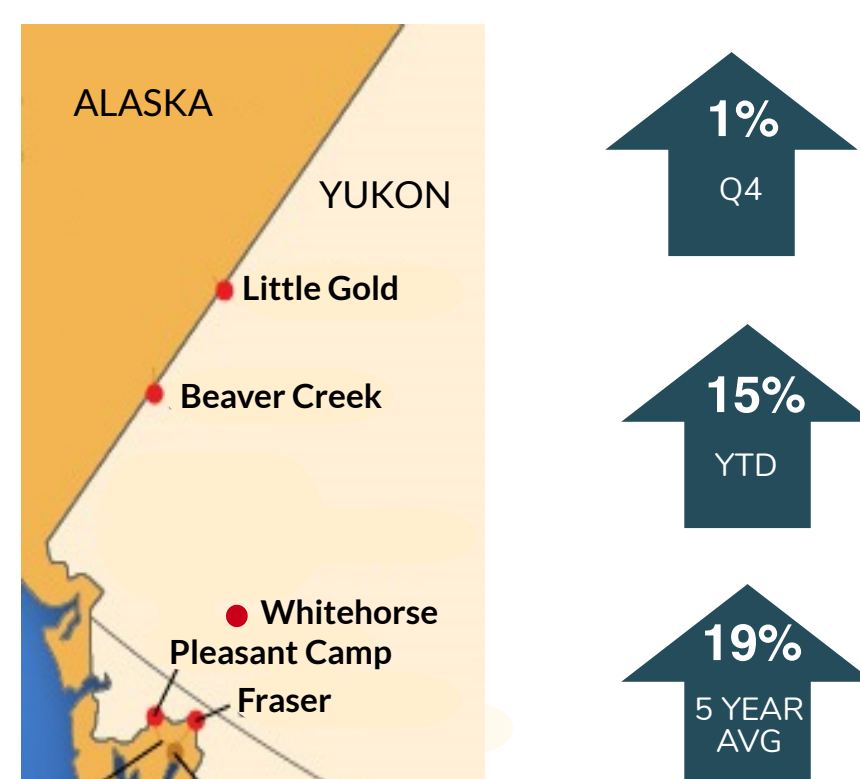
Air Arrivals at Erik Nielson Whitehorse International Airport



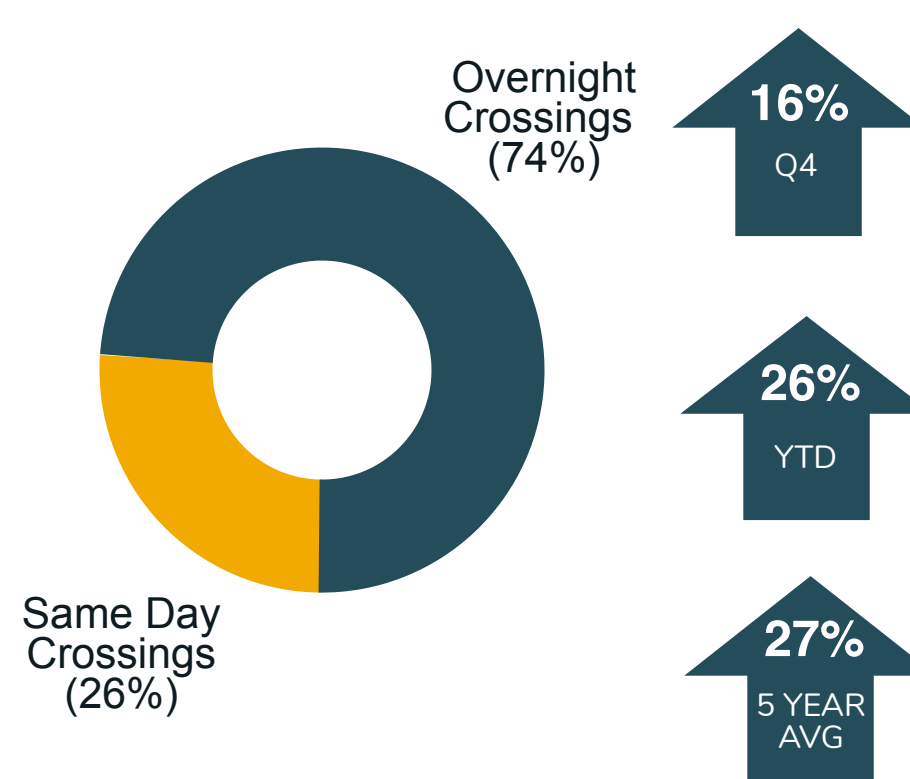
Occupancy at Select Fixed Roof Accommodations



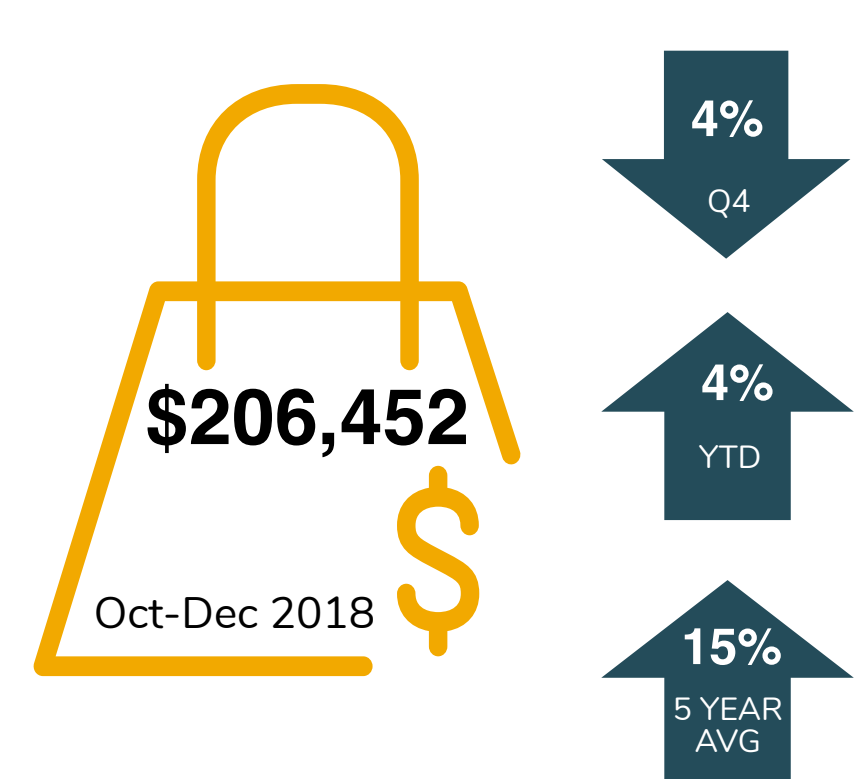
International Border Crossings (Into Yukon)



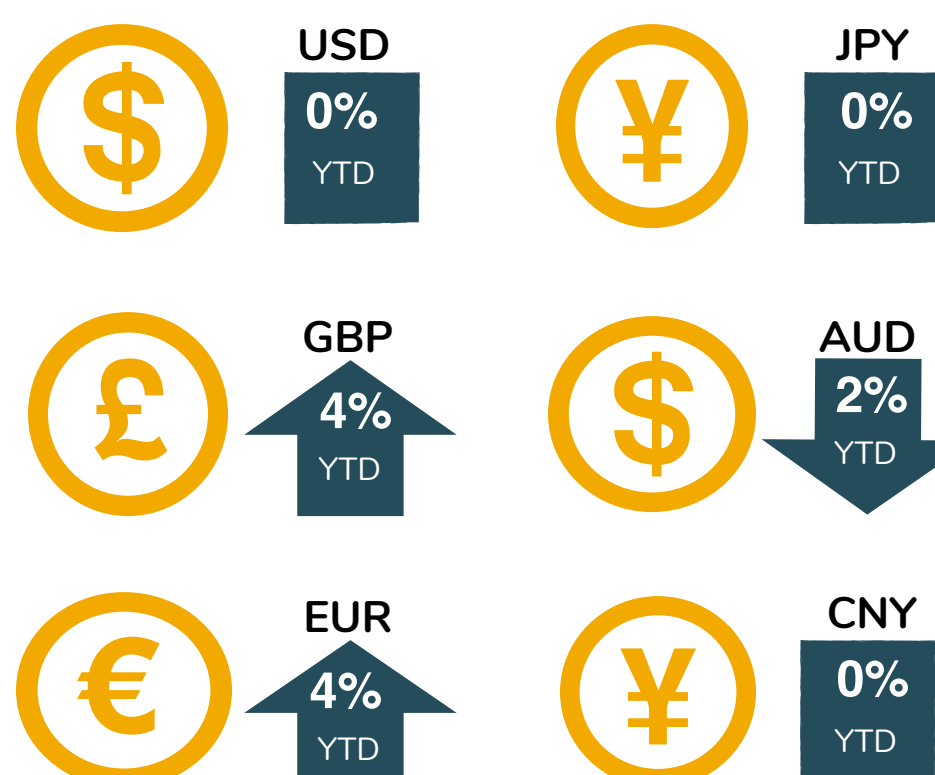
Same Day International Border Crossings (Into Yukon)



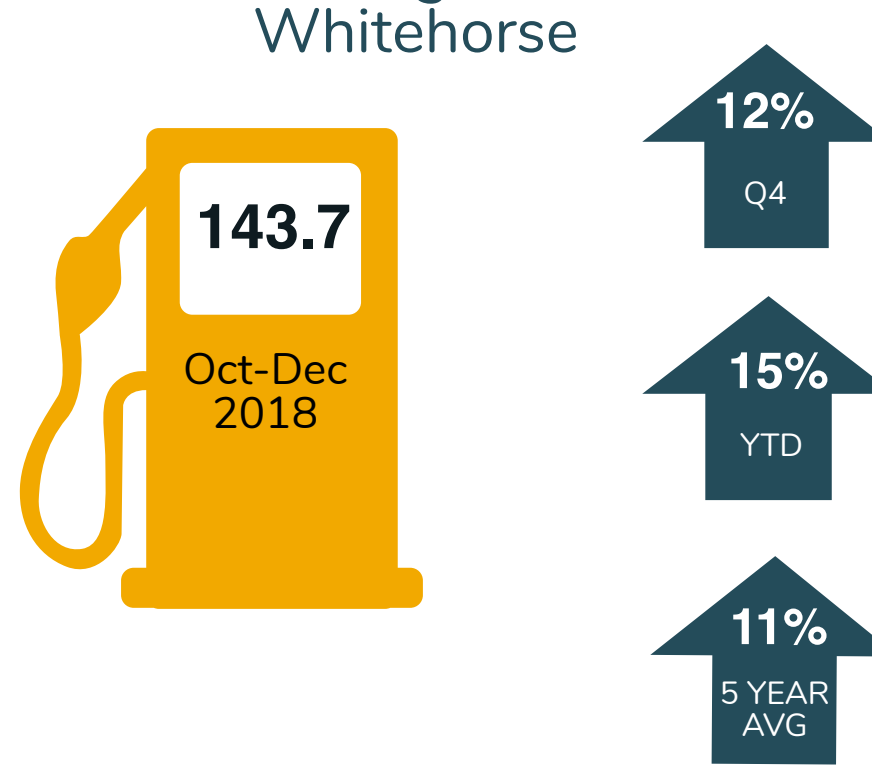
Retail Sales (Total \$000)



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-Dec 2018

2018 vs. 5 Year Average

International Overnight Visitation (1+ Nights)

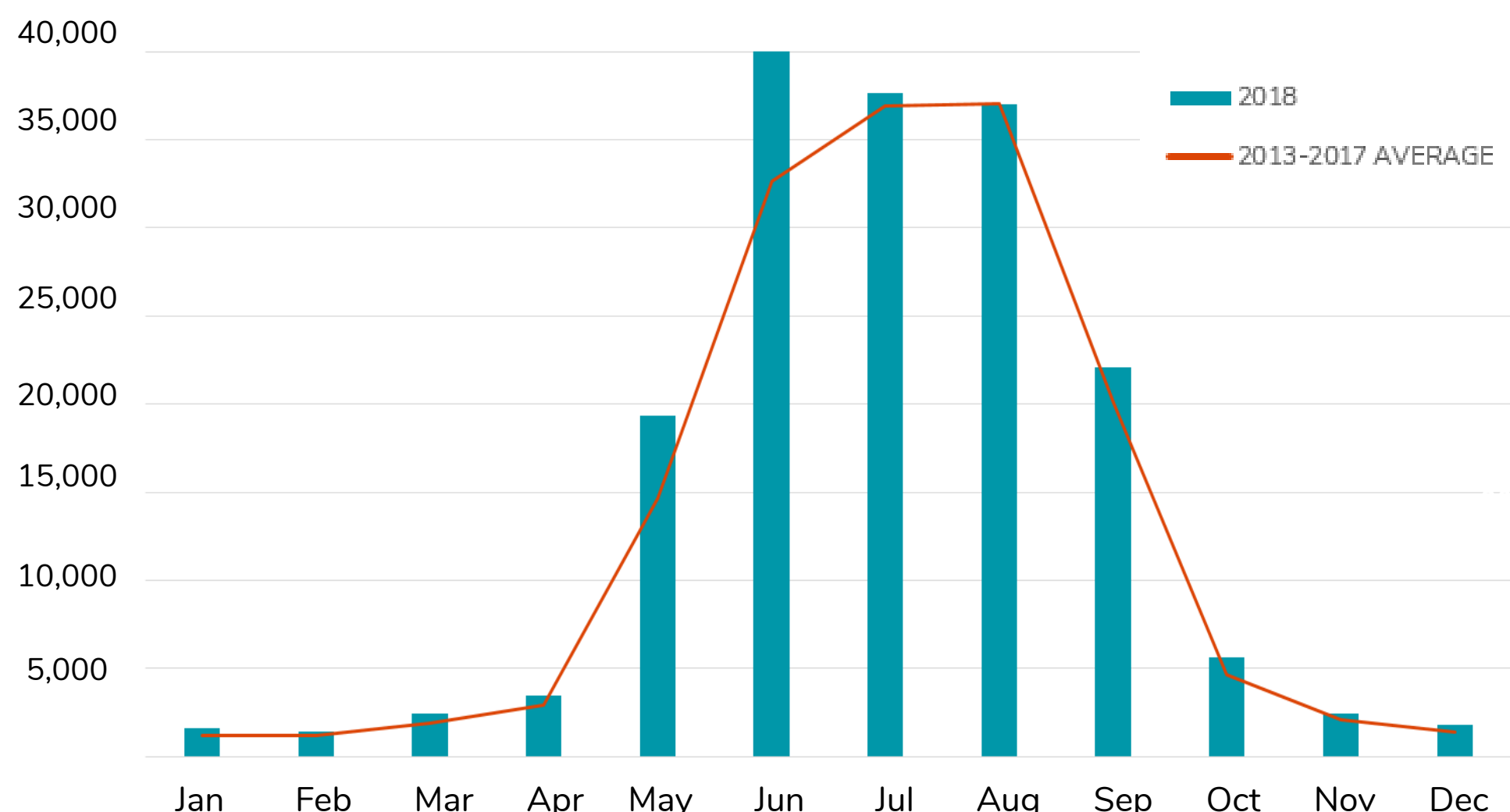
In 2018, overnight visitation for international visitors was 7% higher than in 2017.

The month of December saw an increase of 29% in overnight visitation compared to the 5 year average (2013-2017).

International overnight visitation in 2018 was 12% 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

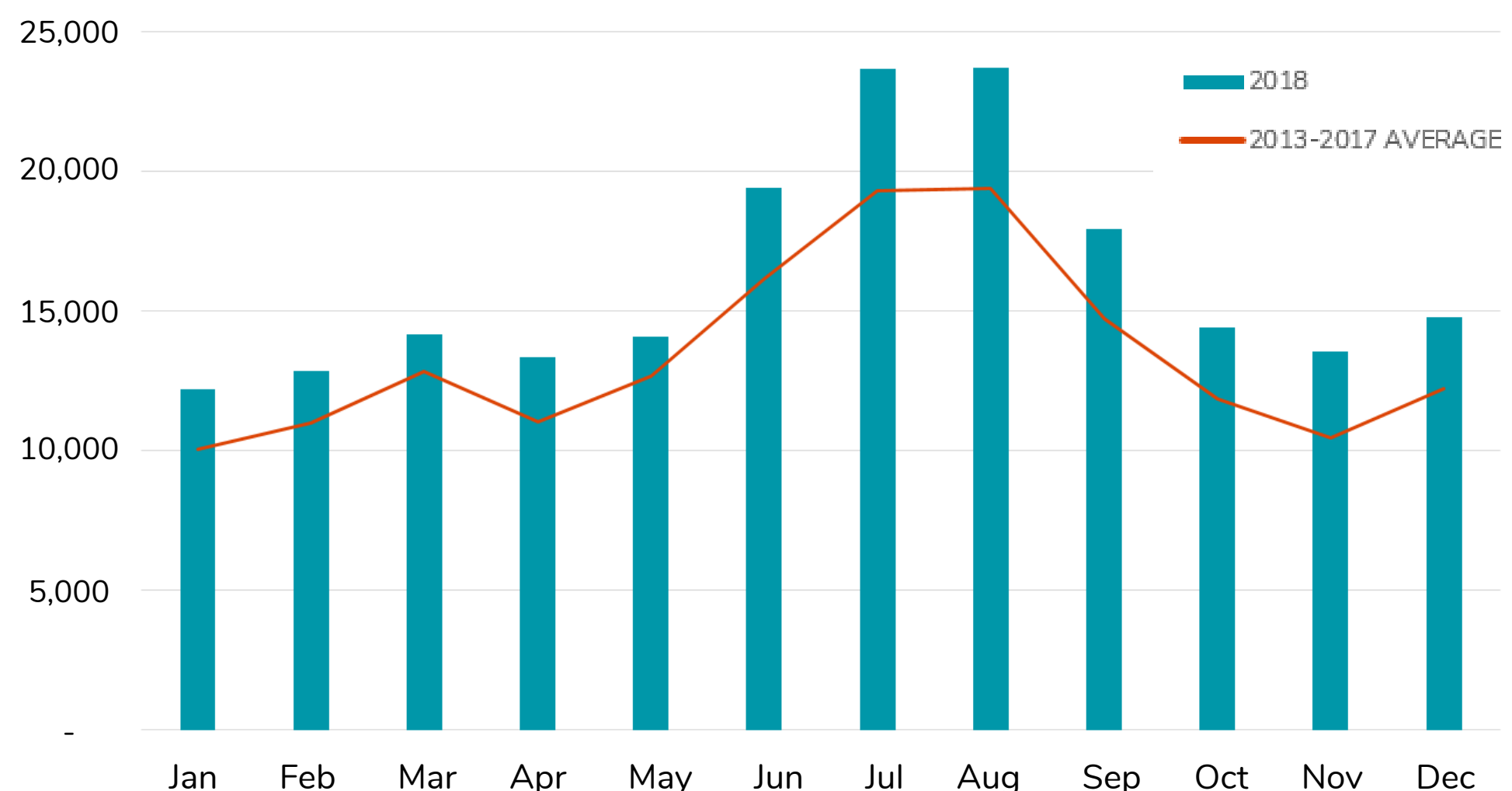
In 2018, air arrivals have grown by 6% or 11,600 more passengers than in 2017.

Over the last 5 years, air arrivals have grown by 27% or 40,700 more passengers than 2014.

Fourth quarter performance is 24% 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 Accommodationⁱⁱ

Occupancy rates in 2018 were 0.4 points lower than in 2017.

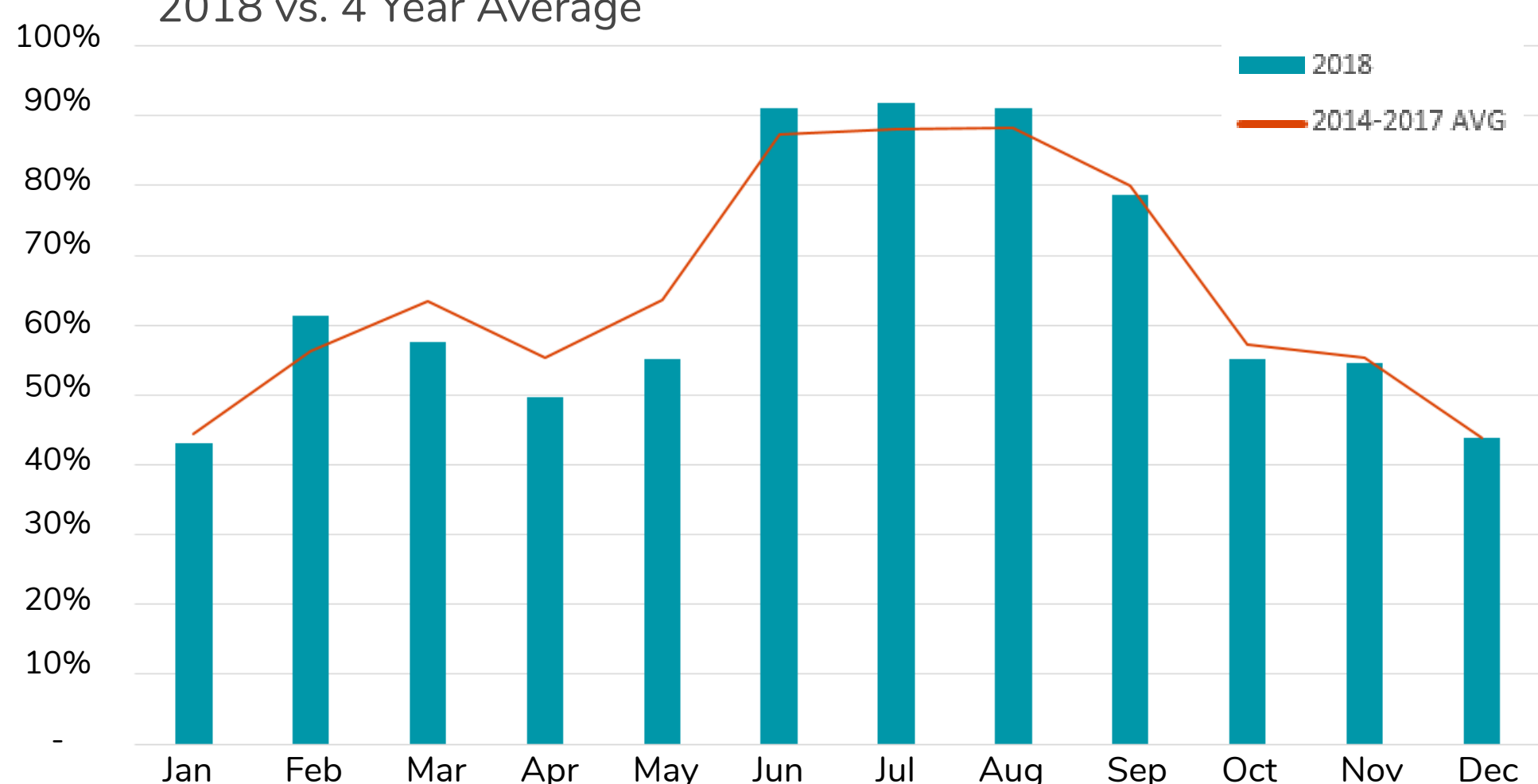
In 2018, Yukon occupancy rates were 1.7 points lower than national rates (66.1%).

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.

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

2018 vs. 4 Year Average



Yukon Tourism Visitation Report

Jan-Dec 2018

International Border Crossings (Into Yukon)

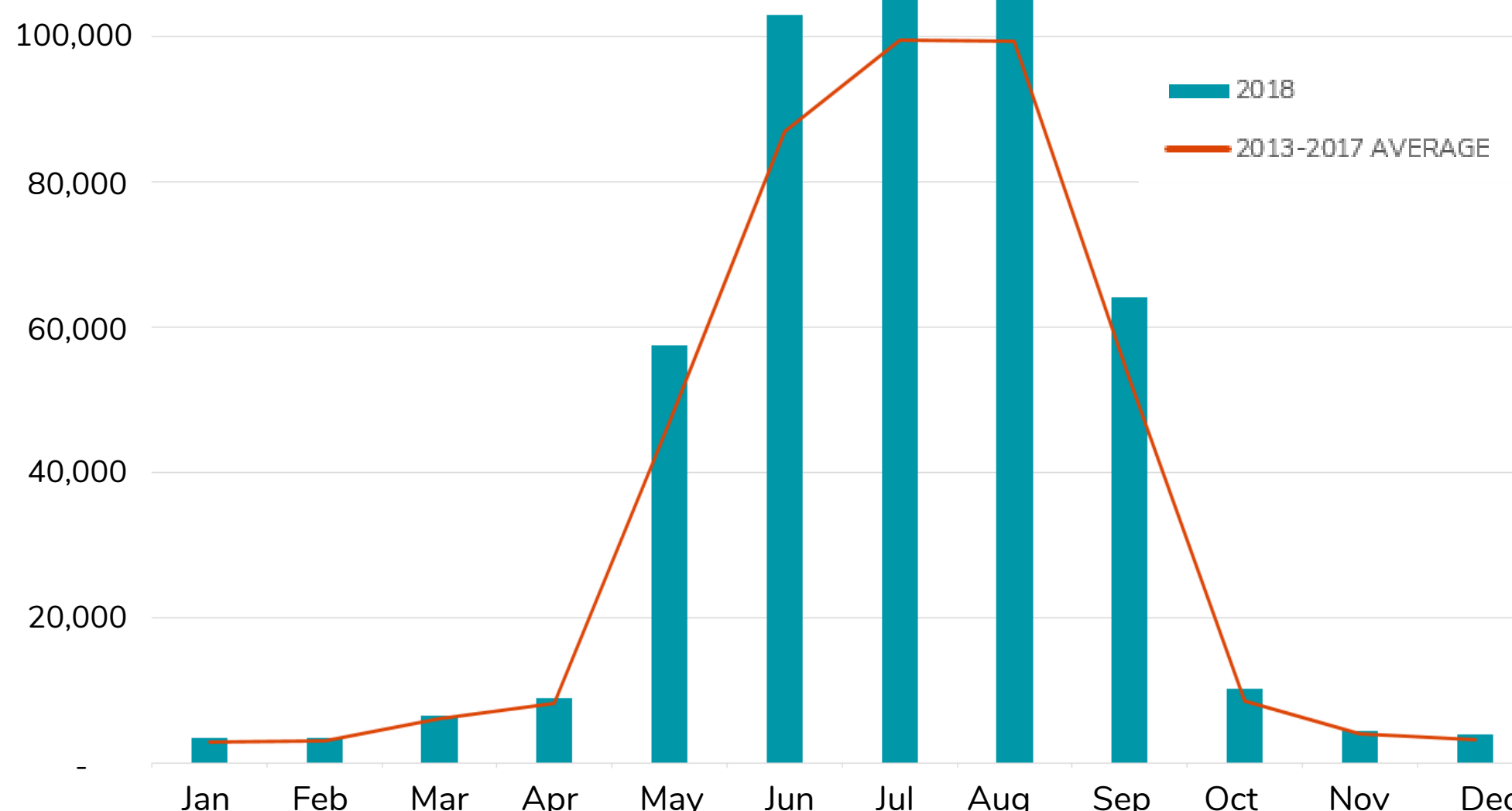
Overall, international border crossings in 2018 were 15% higher than in 2017.

The month of December saw a 6% increase in border crossings compared to 2017.

Crossings through Canadian Border Services Agency ports of entry in 2018 were 19% 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)

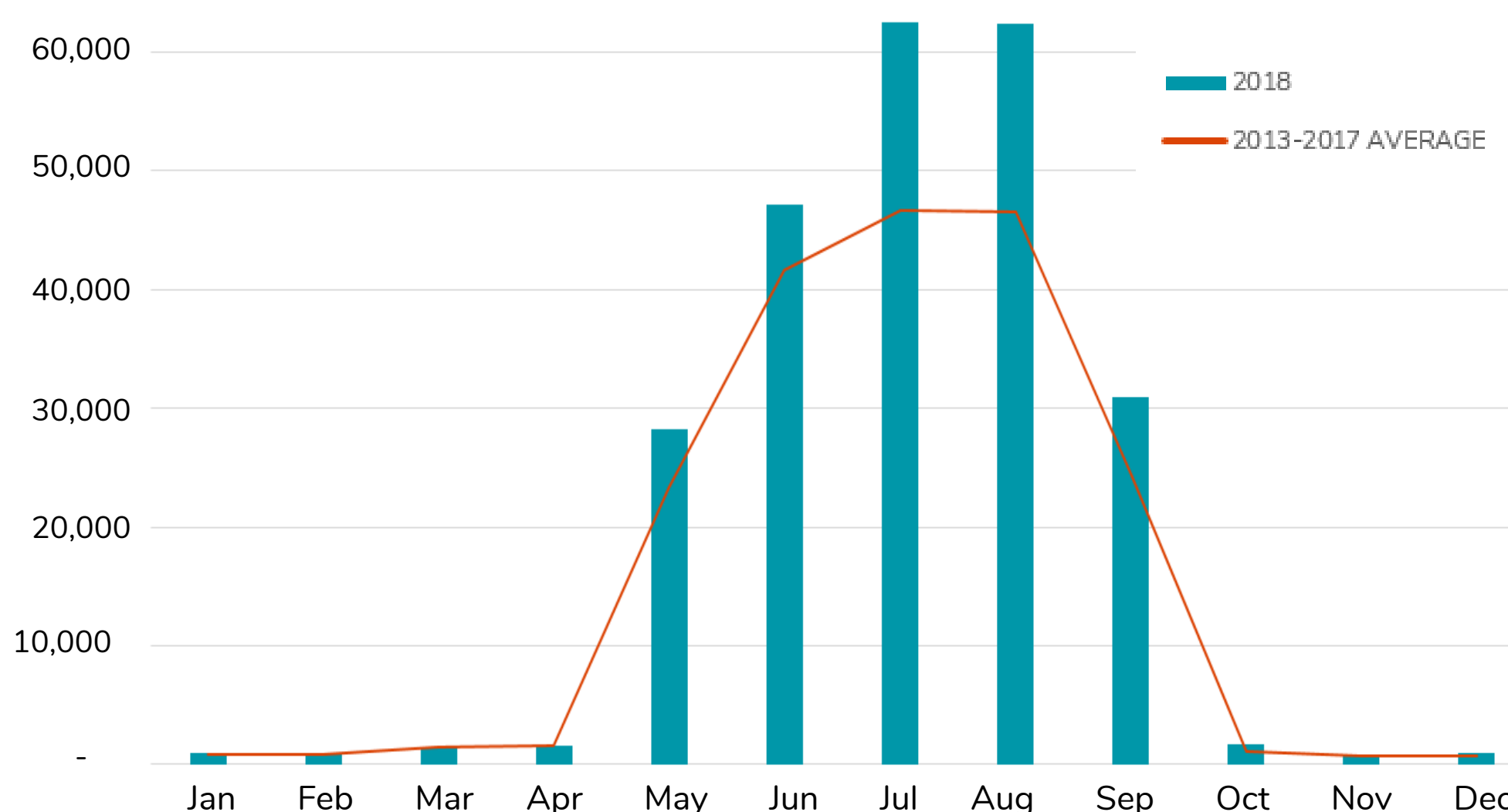
Same day border crossings in 2018 were 26% higher than 2017.

The month of October saw a 27% increase in same day border crossings compared to 2017.

Same day border crossings in 2018 were 26% 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.



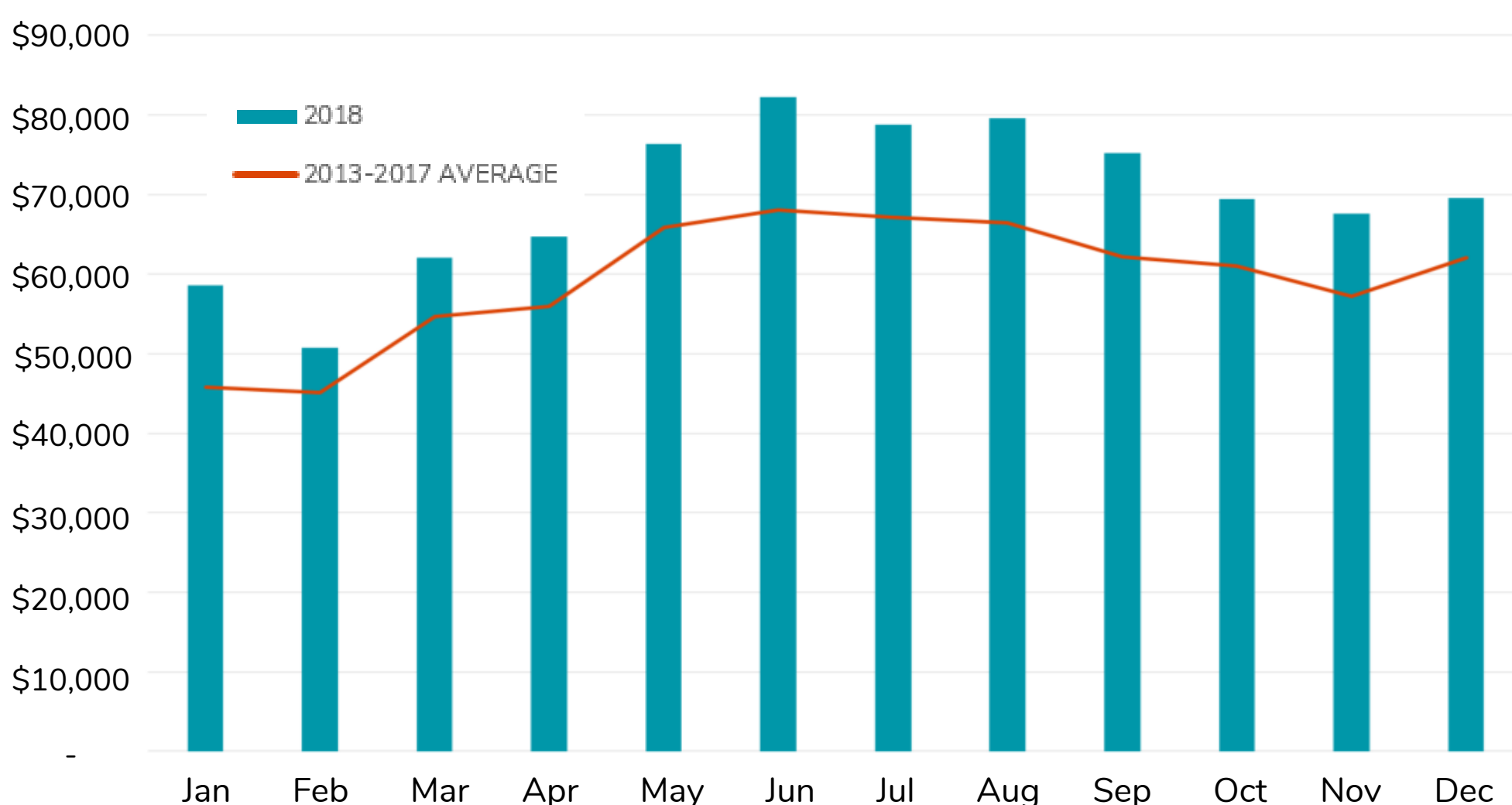
Retail Sales (Total Sales \$000)

Retail sales in 2018 were up 4% (\$34 million) over 2017.

In 2018, retail sales were up 17% compared to the 5 year average (2013-2017).

Comparatively, national retail sales increased 3% in 2018.

Source: Statistics Canada, CANSIM 080-0020.



2018

Year-to-date (YTD)			JAN		FEB		MAR		APR		MAY		JUN		JUL		AUG		SEP		OCT		NOV		DEC	
% YOY Change			% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change		% YOY Change	
INTERNATIONAL OVERNIGHT VISITATION, by Origin ¹																										
Total	175,968	7%	1,588	18%	1,428	11%	2,434	27%	3,437	2%	19,369	17%	41,169	15%	37,617	-1%	37,003	5%	22,095	6%	5,620	-1%	2,418	-1%	1,790	9%
US	155,983	9%	1,557	19%	1,377	15%	2,335	32%	3,257	2%	18,414	20%	37,211	18%	32,354	0%	31,170	5%	18,859	6%	5,368	-1%	2,353	-1%	1,728	7%
Overseas	19,985	-2%	31	-30%	51	-45%	99	-32%	180	3%	955	-17%	3,958	-7%	5,263	-7%	5,833	7%	3,236	5%	252	0%	65	7%	62	148%
AIR ARRIVALS AT ERIK NEILSON WHITEHORSE INTERNATIONAL AIRPORT ²																										
Arrivals	194,123	6%	12,195	6%	12,848	11%	14,156	0%	13,341	3%	14,067	1%	19,415	5%	23,677	9%	23,730	7%	17,938	7%	14,419	9%	13,547	14%	14,790	5%
OCCUPANCY AT SELECT FIXED ROOF ACCOMMODATIONS ^{3 1}																										
Occupancy	64.4%	0.0	43.2%	-3.1	61.4%	1.8	57.6%	-2.1	49.7%	-3.0	55.2%	-3.1	91.0%	5.0	91.8%	1.3	91.1%	3.1	78.7%	-2.8	55.1%	0.0	54.5%	0.0	-43.9%	0.0
INTERNATIONAL BORDER CROSSINGS (INTO YUKON) ⁴																										
Total	501,518	15%	3,473	2%	3,441	1%	6,504	30%	8,980	-12%	57,456	23%	103,039	16%	119,066	16%	116,759	15%	64,080	15%	10,217	1%	4,449	-1%	4,054	6%
US	365,239	19%	2,454	17%	2,195	12%	3,799	26%	4,779	-2%	39,859	28%	78,292	18%	89,123	19%	87,217	18%	44,699	17%	7,034	4%	3,102	-2%	2,686	11%
CAN	85,711	4%	1,239	-1%	1,171	-13%	2,548	40%	3,954	-22%	9,729	2%	14,288	13%	18,888	6%	17,407	2%	11,021	14%	2,884	-7%	1,277	0%	1,305	-4%
Other	50,802	9%	50	-7%	75	-23%	157	-11%	247	-11%	7,832	28%	10,459	4%	11,055	5%	12,135	10%	8,360	4%	299	11%	70	-3%	63	91%
SAME DAY INTERNATIONAL BORDER CROSSINGS (INTO YUKON) ⁵																										
Total	239,579	26%	916	13%	842	8%	1,522	19%	1,589	-10%	28,358	37%	47,782	18%	62,561	32%	62,349	26%	30,964	23%	1,713	27%	754	-4%	959	18%
RETAIL SALES (\$000) ⁶																										
Total	\$934,585	4%	\$58,526	19%	\$50,737	5%	\$60,055 ^a	0%	\$64,652	6%	\$76,354	4%	\$82,278	9%	\$78,718	4%	\$79,574	12%	\$75,239	7%	69,397	-1%	67,570	-3%	69,485	-7%

*YOY = Year-over-year variance. For Quarter 2 this is comparing Q1 + Q2 2018 to Q1 + Q2 2017.

¹ Source: Canadian Tourism Research Institute. Excludes Canadian visitors. ² Source: Government of Yukon, HPW. Includes local air passenger arrivals. ³ Source: CBRE Trends in the Canadian Hotel Industry National Market Report. Figures represent approx. 600 rooms in Yukon only.

^{4/5}Source: Statistics Canada, CANSIM 427-0001. Excludes travellers entering Yukon via BC by land, the NWT by land or domestic flights. ⁶ Source: Statistics Canada, CANSIM 080-0020. ^aAdjusted, June 2018. ^bDue to increase in CBRE inventory, 2017-18 data is not directly comparable to previous years.