



Tourism Yukon 2018 Year-End Report

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Note: International border crossings into Yukon

Reported border crossings numbers include only travellers crossing the border at one of six Yukon port's of entry: Beaver Creek, Little Gold, Pleasant Camp, Fraser, Whitehorse airport and Dawson airport. Totals exclude travellers entering Yukon by land via British Columbia on the South Alaska and Stewart-Cassier Highways, the Northwest Territories on the Dempster Highway, or on domestic flights.

Yukon's Tourism Sector: 2018 Year in Review

Yukon's tourism sector continued to perform well in 2018, keeping with a trend of record-breaking visitation. Tourism-related activities add to the diversity of the local economy, help promote the territory as a place to live and visit, and support employment across a wide variety of local goods and service providers. By looking at key indicators, including direct international border crossings, air arrivals, overnight visitation, and retail sales, Yukon saw its best year yet.

For the first time in Yukon's history, direct international border crossings into Yukon surpassed half a million, representing 15 per cent growth over Yukon's last record number from 2017. The majority of travellers crossing an international border remained Americans, representing nearly a quarter of all crossings, followed by Canadians at 17 per cent and overseas visitors at ten per cent. These proportions have remained relatively stable over the past five years.

Among direct international border crossings into Yukon, visitors crossing for less than one day increased 26 per cent to nearly 240,000. Of the same day border crossings, 87 per cent were by Americans and the balance (13 per cent) were from overseas visitors. These proportions have remained stable over the past five years.

The Canadian Tourism Research Institute estimates that overnight visits to Yukon grew nearly five per cent to 323,000 overnight visitors. Overall, they estimate that overnight travel by Americans grew five per cent to 222,000, overnight travel to Yukon by Canadians increased three per cent, to 42,000, and overnight visitation from overseas markets grew five per cent to 59,000.

In 2018, air passenger arrivals at Erik Neilson Whitehorse International Airport in Whitehorse also surpassed previous records, growing to over 194,000 passengers. This represents a six per cent growth in people arriving at the airport over 2017.

The value of retail sales in Yukon was a record high of \$837.5 million in 2018. This represents a growth of five per cent in retail trade over Yukon's previous record high, set in 2017. Although not available for 2018, historically, food and beverage stores have account for nearly one-third of total retail sales in the territory.

Many factors contributed to increased visitation to Yukon in 2018, including favourable exchange rates, increased interest from international markets in Canada, increased interest in Alaskan cruises, and economic conditions.

Yukon's Tourism Sector: 2019 Tourism Outlook

Yukon's tourism sector is expected to continue to grow with an increasing number of local operators offering world class travel experiences on a year-round basis. The growing appeal of Yukon as a travel destination has been reflected in strong performance in recent years, and the sector appears well-positioned for further expansion. On the heels of solid growth in 2018, a high level of tourism activity is anticipated for 2019, with total visitation growth of more than three per cent in 2019, with overnight visitation expected to grow a modest two per cent.

Travel prices in 2019 are projected to increase three per cent. The higher cost of travel will eat into potential travellers' disposable income, while also contributing to greater expenditures by travellers. Expenditures by visitors to Yukon are projected to continue to increase at a strong pace; in 2019, with the rate of growth higher among overnight than same day visitors.

Across most Canadian regions, the Index of Consumer Confidence was down through 2018. Canadian households are expected to continue to have lower discretionary spending through 2019 stemming from weak growth in real wages, increasing costs of inflation and borrowing, and constrained growth in housing prices. As a result, domestic overnight travel to Yukon is anticipated to show stable year-over-year growth in 2019 of three per cent, to 43,000.

Overall, for Americans, the economic environment is expected to remain in good shape, driving demand for tourism. The exchange rate is expected to continue to play in Yukon's favour, with anticipated rates of around \$0.75. Alaskan cruise traffic is expected to increase again in 2019, which may result in more same day border crossings into Yukon. However, Yukon is expected to see only modest growth in overnight visitation from Americans in 2019, at under one per cent. This modest anticipated growth may be due to the difficulty in sustaining the increased volume of travel by Americans that has been seen over the last few years.

Following strong growth in 2018, overnight visitation to Yukon from overseas markets is expected to increase nearly eight per cent in 2019. Should uncertainty around global trade issues ease in 2019, consumer confidence in many international regions may get a boost. The travel demand from overseas is expected to continue to benefit from favourable exchange rates for many international markets and solid economic growth. One exception are visits from the United Kingdom, which are expected to be constrained, as the value of the British Pound and consumer confidence weaken due to the uncertainty around the long term impacts of Brexit negotiations. Similarly, the ongoing political uncertainty in China is expected to affect visitation numbers from China to Canada. Despite strong anticipated growth, the overseas market remains the most volatile, due to geopolitical threats and crises.

Notes: The Yukon tourism outlook uses key statistics covering major aspects of the tourism industry in Yukon and relevant global trends. The aim is to provide the most recent and accurate information, but all data are subject to ongoing revisions from sources.

Key Tourism Indicators: Indicators of Visitation Performance

INDICATORS OF VISITATION PERFORMANCE	2014	2015	2016	2017	2018	Change 2017 to 2018
INTERNATIONAL BORDER CROSSINGS (INTO YUKON) ^{a 1}						
Total	413,886	405,120	419,244	434,554	500,022	15.1%
Beaver Creek	64,947	63,863	72,290	83,409	86,330	3.5%
Fraser/Whitehorse	299,542	285,324	287,252	292,963	355,585	21.4%
Dawson/Little Gold	19,618	21,315	21,483	21,867	21,782	-0.4%
Pleasant Camp	29,761	34,596	38,213	36,304	36,315	0.0%
ALASKA LAND BORDER CROSSINGS (FROM YUKON TO ALASKA) ^b						
Total	481,559	489,600	528,707	538,300	595,550	10.6%
Alcan/Poker Creek, AK (Beaver Creek and Little Gold)	82,808	103,473	120,065	117,063	136,163	16.3%
Skagway, AK (Fraser)	363,141	346,683	368,781	381,961	417,092	9.2%
Dalton Cache, AK (Pleasant Camp)	35,610	39,444	39,861	39,276	42,295	7.7%
ESTIMATED OVERNIGHT VISITATION TO YUKON ^{c 2}						
Total	231,000	309,000	322,000	340,000	323,000	4.8%
Domestic	37,000	35,000	35,000	71,000	42,000	3.3%
Business	19,000	17,000	16,000	6,000	6,000	4.3%
Pleasure	15,000	16,000	17,000	26,000	15,000	3.2%
United States	170,000	224,000	234,000	238,000	222,000	4.9%
Overseas	24,000	50,000	53,000	31,000	59,000	5.4%
AIR PASSENGER MOVEMENTS AT ERIK NELSON WHITEHORSE INTERNATIONAL AIRPORT ^{d 3}						
Total passengers	311,168	313,613	341,028	355,587	392,612	10.4%
Arrivals	153,353	156,018	169,448	182,466	194,123	6.4%
Departures	157,815	157,595	171,580	183,636	198,489	8.1%
AIRCRAFT MOVEMENTS ^{e 4}						
Total	38,237	38,882	44,514	50,567	56,060	10.9%
Whitehorse	22,879	23,053	29,101	31,687	38,418	21.2%
Beaver Creek	163	127	406	252	290	15.1%
Burwash Landing	601	929	966	1,338	643	-51.9%
Dawson City	6,021	6,445	6,802	9,051	5,902	-34.8%
Faro	781	725	757	706	680	-3.7%
Mayo	2,737	2,356	2,198	3,168	3,962	25.1%
Old Crow	1,265	1,242	1,162	1,478	1,178	-20.3%
Teslin	182	167	127	124	360	190.3%
Watson Lake	3,608	3,838	2,995	2,763	4,627	67.5%
AIRLINE SEAT CAPACITY ^{f 5}						
Total	205,537	282,232	263,479	273,169	313,550	14.8%
Domestic seat capacity FROM Yukon	201,262	282,630	260,222	268,436	309,029	15.1%
Domestic seat capacity TO Yukon	201,134	277,830	259,080	268,800	308,907	14.9%
International seat capacity TO Yukon	4,403	4,402	4,399	4,369	4,643	6.3%

Sources: ^a Statistics Canada, CANSIM 427-0001. | ^b U.S. Department of Transportation, Bureau of Transportation Statistics. Based on data from Homeland Security, U.S. Customs and Border Protection | ^c Canadian Tourism Research Institute, Conference Board of Canada, Travel Markets Outlook. | ^d Government of Yukon, Department of Highways and Public Works, Aviation Branch. | ^e Statistics Canada, Tables 23-10-0002-01 and 23-10-0016-01. | ^f Canadian Tourism Research Institute, derived from BACK Aviation.

Notes: ¹ Total does not sum as international border crossings into Old Crow not shown. Excludes travellers entering Yukon by land via British Columbia on the South Alaska or Stewart-Cassier Highways, the Northwest Territories on the Dempster Highway, or on domestic flights. | ² 2018 figures are forecast, per autumn report. All other figures are estimates as reported in the spring following the reporting year (i.e. 2016 estimates are from Spring 2017 report). Percent change shown is a forecast of expected growth from 2017 to 2018 as reported by Canadian Tourism Research Institute. Forecasted numbers are often revised but present the most up-to-date information available at the time of publication. | ³ Includes business, pleasure, and local air passenger movements. Figures only capture air passenger movements at one of Yukon's airports. | ⁴ Figures represent only the number of planes landing at community airports, not the volume of passengers on each plane. | ⁵ Domestic seat capacity from Yukon captures outbound capacity from Yukon to destinations within Canada (i.e. excludes intra-territorial flights). Domestic seat capacity to Yukon captures capacity from anywhere in Canada to Yukon (i.e. includes intra-territorial flights).

Key Tourism Indicators: Indicators of Visitation Performance

INDICATORS OF VISITATION PERFORMANCE	2014	2015	2016	2017	2018	Change 2017 to 2018
YUKON GOVERNMENT CAMPGROUND USEAGE BY NON-RESIDENTS ^{g 6}						
Campground occupancy	19,629	24,036	26,326	29,409	33,431	13.7%
Campground traffic	42,965	52,164	56,903	64,035	70,555	10.2%
Number of non-residents camping	38,022	44,969	49,915	55,683	61,890	11.1%
Average non-resident nights	1.13	1.16	1.14	1.15	1.14	-0.9%
Average visitors per party	2.16	2.16	2.15	2.16	2.10	-2.8%
Number of nights non-residents camped, by region						
Campbell	981	1,296	1,100	1,004	1,253	24.8%
Klondike	4,578	5,928	5,849	6,747	7,661	13.5%
Kluane	5,111	5,730	6,724	7,688	8,486	10.4%
North Yukon	1,848	2,629	2,432	2,798	3,469	24.0%
Silver Trail	395	545	530	717	728	1.5%
Southern Lakes	2,055	2,450	3,654	4,250	4,678	10.1%
Watson Lake	1,771	2,367	2,665	3,002	3,551	18.3%
Whitehorse	2,085	2,203	2,857	3,345	3,606	7.8%
OCCUPANCY AT SELECT FIXED ROOF ACCOMMODATIONS ^{h 7}						
Occupancy Rate	68%	67%	65%	65%	64%	-0.4
YUKON VISITOR INFORMATION CENTRE ATTENDANCE ^{i 8}						
Total	246,335	252,349	324,965	402,795	414,540	2.9%
Whitehorse	76,322	88,400	95,041	103,526	99,491	-3.9%
Beaver Creek	12,099	12,866	11,531	12,161	12,501	2.8%
Carcross	76,958	64,256	91,228	84,664	97,861	15.6%
Dawson City	29,544	37,569	71,833	113,013	110,224	-2.5%
Haines Junction	22,585	22,074	25,384	61,668	66,349	7.6%
Watson Lake	21,776	23,742	27,509	26,977	27,682	2.6%
Airport	7,051	3,442	2,439	786	432	-45.0%
WI-FI USERS AT YUKON VISITOR INFORMATION CENTRES ^{j 9}						
Total	..	12,780	29,184	37,717	39,068	3.6%
Whitehorse	..	4,025	9,638	11,695	10,627	-9.1%
Beaver Creek	..	683	1,018	1,738	1,753	0.9%
Carcross	..	1,784	2,249	3,041	4,145	36.3%
Dawson City	..	2,693	7,611	10,077	10,809	7.3%
Haines Junction	..	1,811	3,953	5,839	6,661	14.1%
Watson Lake	..	1,784	4,715	5,327	5,073	-4.8%

Sources: ^g Government of Yukon, Department of Environment, Parks Branch | ^h CBRE Hotels. | ⁱ Government of Yukon, Department of Tourism and Culture, Visitor Services Unit. | ^j Government of Yukon, Department of Tourism and Culture, Corporate Services.

Notes: ⁶ All data based on information provided on campsite registration envelopes and transcribed into the Yukon Campground System by Department of Environment staff. In 2017, many campgrounds were without registration envelopes for several days during the season. It is impossible to estimate visitation that was not recorded during those time periods. In 2016, several campground vaults had envelopes stolen. Parks staff estimate the missing envelopes account for a 1% to 2% increase in occupancy overall. No adjustments were made to account for the missing data. Parks estimates the number of unrecorded nights overall was 0.8% of all registration in 2015, and 2.8% in 2016. Occupancy is the total number of sites that are occupied by non-residents (sum of nights non-residents spent camping). Campground traffic, or person nights, are the total number of nights people spend in a campground (# visitors multiplied by the # nights). Number of non-residents camping is the total number of people that spent a night in a YG campground (person nights divided by average number of nights). This measure does not however represent unique individuals. Average non-resident nights is the average number of nights non-residents stay in a campsite. | ⁷ With reproduction and use of information subject to CBRE Disclaimer / Terms of Use as detailed at www.cbre.ca. Data only represents approximately 600 rooms in Yukon and should not be generalized to the whole accommodation market. Due to increases in CBRE inventory, 2017 and 2018 data is not directly comparable to previous periods. | ⁸ Due to methodological changes implemented in Dawson City over the 2016 season and Haines Junction over the 2017 season, year-over-year comparisons cannot be made. | ⁹ Wi-Fi was installed at the end of June 2015, therefore the whole year is not represented and direct year-over-year comparisons cannot be made.

Key Tourism Indicators: Indicators of Visitation Performance

INDICATORS OF VISITATION PERFORMANCE	2014	2015	2016	2017	2018	Change 2017 to 2018
MUSEUM AND CULTURAL CENTRE ATTENDANCE ^{k 10}						
Heritage/cultural centre attendance	32,525	..	33,790	23,544	..	...
Museum attendance	83,651	94,215	98,938	104,271	..	...
Beringia Centre tickets sold ¹¹	17,528	18,705	19,556	20,407	23,898	17.1%
PARKS AND HISTORIC SITE USAGE ^l						
Kluane National Park and Reserve ^l	25,072	26,981	27,606	29,736	32,066	7.8%
National historic sites ^{l 12}	38,884	41,180	61,611	85,611	86,286	0.8%
Herschel Island visitors ^{m 13}	399	505	400	525	107	-79.6%
Forty Mile visitors ^m	348	397	331	240	223	-7.1%
Fort Selkirk visitors ^m	1,129	634	688	742	943	27.1%
ATTENDANCE AT FIRST NATIONS TOURISM EVENTS ⁿ						
Adäka Cultural Festival attendance ¹⁴	5,858	6,000	..	12,300	9,500	-22.8%
Advancing Indigenous Tourism Conference delegates	..	..	..	86	160	86.0%
MEETINGS, INCENTIVES, CONFERENCES AND EVENTS/EXPOS ^{o 15}						
Number of meetings	23	27	25	40	35	-12.5%
Number of delegates	3,931	2,605	2,260	3,145	3,340	6.2%
Average number of nights	3.4	4.7	4.0	4.6	4.3	-6.5%
SPORTS EVENTS ^p						
Sports events hosted	19	19	23	25	34	36.0%
Number of non-residents attending	5,330	4,560	6,190	8,205	8,150	-0.7%
ARTS IN THE PARK ^{q 16}						
Attendance at Arts in the Park	..	9,220	8,730	8,250	8,800	6.7%

Sources: ^k Government of Yukon, Department of Tourism and Culture, Museums Unit. | ^l Parks Canada, Yukon Field Unit. | ^m Government of Yukon, Department of Tourism and Culture, Historic Sites. | ⁿ Yukon First Nations Culture and Tourism Association. | ^o Yukon Convention Bureau | ^p Sport Yukon. | ^q Music Yukon.

Notes: ¹⁰ Figures based on fiscal year, so 2015 captures from attendance from April 1, 2015 to March 31, 2016. 2018 heritage/cultural center attendance does not capture all cultural centers due to late reporting. | ¹¹ Yukon Beringia Interpretive Centre tickets sold from January 1 to December 31. | ¹² Methodology for counting visitors was changed in 2016, therefore data should not be compared with previous years. | ¹³ Visitors to Hershel Island are monitored and recorded by the Park Rangers (Yukon Parks) on site during the operating season and through a guest book in the Hunters and Travellers Cabin in the off season. | ¹⁴ Attendance at Adäka Cultural Festival are estimates. | ¹⁵ Figures based on fiscal year, so 2015 captures from attendance from April 1, 2015 to March 31, 2016. | ¹⁶ Attendance figures are estimates and include both visitors and residents.

Key Tourism Indicators: Indicators of Economic Performance

INDICATORS OF ECONOMIC PERFORMANCE	2014	2015	2016	2017	2018	Change 2017 to 2018
YEAR-OVER-YEAR CHANGE IN TOURISM SECTOR REVENUES, BY SOURCE ^{r 17}						
Total	5.2%	-0.9%	5.1%	7.5%	4.6%	...
Canadian (domestic) visitors	6.1%	8.8%	7.4%	6.8%	7.7%	...
Non-resident (international) visitors	1.1%	-2.6%	5.7%	6.1%	6.9%	...
Non-visitors (Yukoners)	6.8%	-3.4%	4.0%	8.4%	2.4%	...
YEAR-OVER-YEAR CHANGE IN TOURISM SECTOR REVENUES, BY INDUSTRY ^{r 17}						
Total	5.2%	-0.9%	5.1%	7.5%	4.6%	...
Air transportation	7.6%	3.2%	3.3%	4.8%	10.5%	...
Other transportation	2.3%	-3.6%	2.8%	6.0%	3.2%	...
Accommodation	1.8%	0.9%	-5.8%	-1.3%	2.1%	...
Food and beverage	8.9%	3.4%	2.0%	-0.2%	0.9%	...
Recreation and entertainment	7.1%	4.0%	2.7%	0.9%	-0.2%	...
Travel services	-1.9%	-4.3%	1.8%	-6.2%	4.4%	...
ROOM REVENUE AT SELECT FIXED ROOF ACCOMMODATIONS ^{s 18}						
Average Daily Room Rate	..	\$118	\$122	\$129	\$139	7.0%
Revenue Per Available Room	..	\$80	\$81	\$86	\$92	6.9%
PRIVATE SHORT-TERM ACCOMMODATIONS ^t						
Revenue (\$000)	..	\$308	\$1,071	\$2,777	\$4,678	68.5%
Daily revenue per listing	..	..	\$25.32	..	..	...
RESTAURANT RECEIPTS ^u						
Food services and drinking places (\$000)	\$67,606	\$66,605	\$67,072	\$74,196	\$77,085	3.9%
RETAIL SALES ^v						
Total sales (\$000)	\$663,034	\$697,538	\$751,087	\$799,519	\$837,450	4.7%
Food and beverage stores (\$000)	\$201,225	\$209,691	..	..	..	...
TOURISM EMPLOYMENT ^w						
Number of jobs in tourism industries	..	3,500	..	..	..	...
Average weekly hours worked per job	..	31.4	..	..	..	...
Average hourly wage (full-time)	..	\$19.06	..	..	..	...

Sources: ^r Canadian Tourism Research Institute, Tourism Sector Performance Monitor. | ^s CBRE Hotels. | ^t Statistics Canada, National Economic Accounts, special tabulations | ^u Statistics Canada, Table 21-10-0019-01. | ^v Statistics Canada, Table 20-10-0008-01. | ^w Statistics Canada, Provincial-Territorial Human Resource Module.

Notes: ¹⁷ All figures represent year-over-year growth; i.e. 2016 figures represent the growth in revenues from 2015 to 2016. Tourism sector revenues are revenues tourism businesses attributed to travellers by origin. Total includes revenues attributable to non-visitors (for example expenditures made by Yukoners in tourism businesses such as restaurants or attractions), but excludes revenues from vehicle fuel and vehicle repairs and parts. | ¹⁸ With reproduction and use of information subject to CBRE Disclaimer / Terms of Use as detailed at www.cbre.ca. Data only represents approximately 600 rooms in Yukon and should not be generalized to the whole accommodation market. Due to increases in CBRE inventory, 2017 and 2018 data is not directly comparable to previous periods.

Key Tourism Indicators: Other Indicators

OTHER INDICATORS	2013	2014	2015	2016	2017	2018	Change 2017 to 2018
TRAVEL PRICE INDEX ^{x 19}	2.01	1.87	1.05	1.67	4.02	4.19	0.17
FUEL PRICES (CENTS/LITRE) ^y							
Whitehorse	1.03	1.10	112.3	109.0	117.4	135.0	15.0%
EXCHANGE RATES (VALUE OF 100 CAD) ^z							
United States dollar	\$103	\$110	\$128	\$132	\$130	\$129	-0.4%
European Euro	€ 137	€ 147	€ 142	€ 147	€ 146	€ 153	4.8%
United Kingdom Pound	£161	£182	£195	£180	£167	£173	3.6%
INDEX OF CONSUMER CONFIDENCE ^{aa}							
Canada	..	100.0	98.2	97.0	114.7	116.0	1.3
Ontario	..	100.0	102.8	99.4	109.4	107.1	-2.3
Praries	..	100.0	66.0	58.0	76.9	78.6	1.7
British Columbia	..	100.0	116.1	115.4	129.9	130.9	1.0

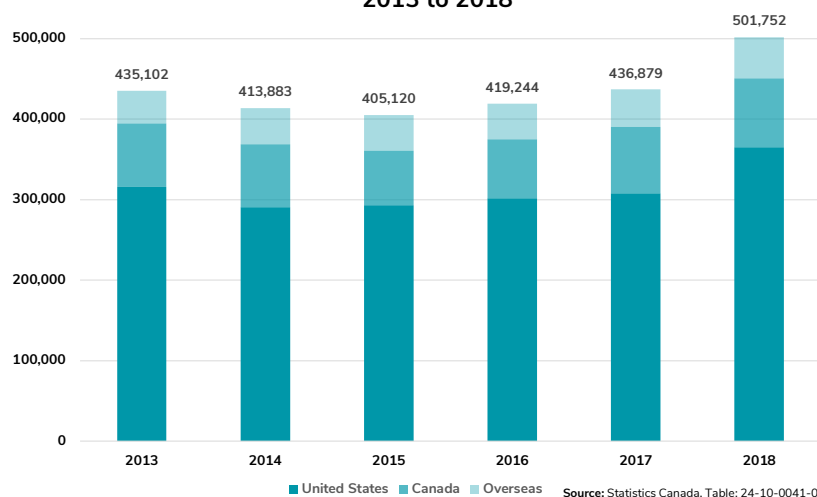
Sources: ^x Canadian Tourism Research Institute, Travel Market Outlooks. | ^y Government of Yukon, Department of Finance, Yukon Bureau of Statistics. | ^z Bank of Canada, Monthly Average Exchange Rates. | ^{aa} Conference Board of Canada, Monthly Consumer Confidence Index.

Notes: ¹⁹ Figures for 2018 are forecast, as produced in the Travel Markets Outlook, Autumn report. All other figures are estimates, as reported in the Travel Markets Outlook, spring report for the following reporting year; i.e. 2015 estimates are from the spring 2016 report. 2017 saw a significant jump in Travel Price Index above what was initially forecasted. This price inflation was mainly due to high gasoline prices, affecting the transportation industry.

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HIGHLIGHTS

International border crossings into Yukon
2013 to 2018



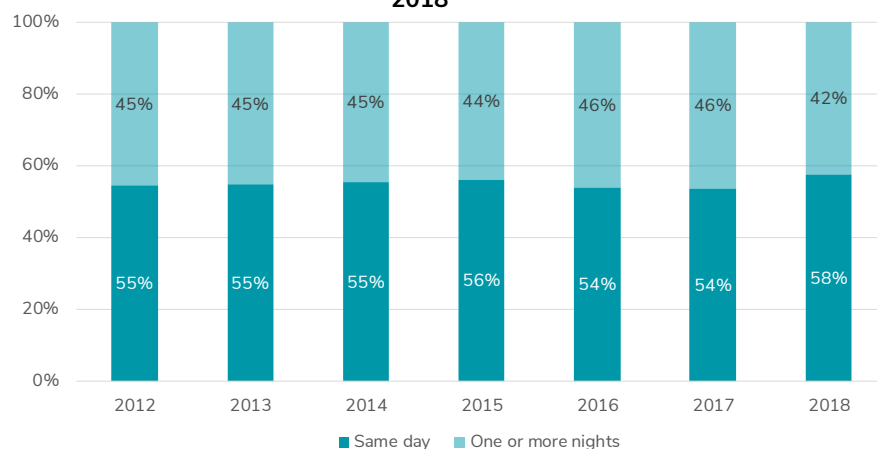
In 2018, over 500,000 people were cleared by Canadian Border Services Agency at a Yukon port of entry for entry into Canada. Overall, this is an increase of 15% (64,800 people) over 2017.

Between 2013 and 2018, the total number of border crossings increased nearly 88,000 people.

Of the total border crossings in 2018, 73% (365,239) were Americans, 17% (85,711) were Canadians (including Yukoners), and 10% (50,802) were from overseas.

See page 16 for detailed data.

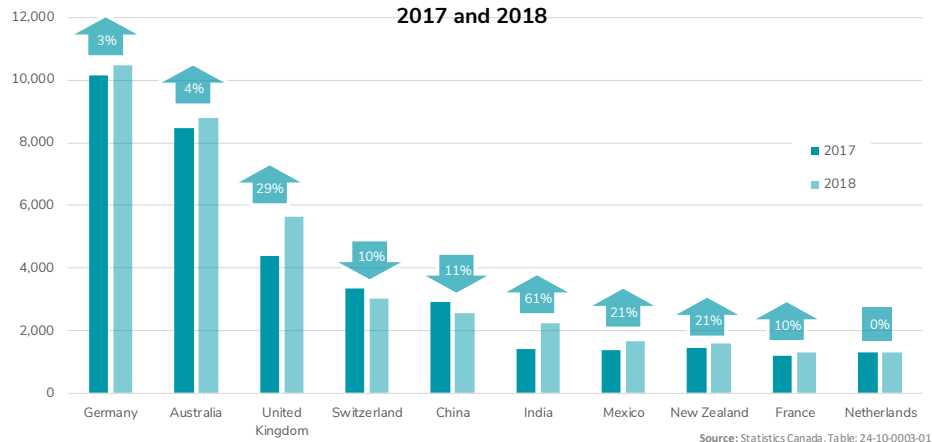
Border crossings by length of stay, excluding Canadians
2018



Of the 156,513 people, excluding Canadians, who entered Yukon for one or more nights, 89% were American and 11% were from overseas.

Year-over-year, same day crossings increased 26% and crossings for one or more nights increased 10%.

International border crossings into Yukon,
Top 10 countries, excluding United States and Canada
2017 and 2018



Excluding Canadians and Americans, Germans had the highest number of overall border crossings into Yukon, increasing 3% in 2018 over 2017, to 10,487 people.

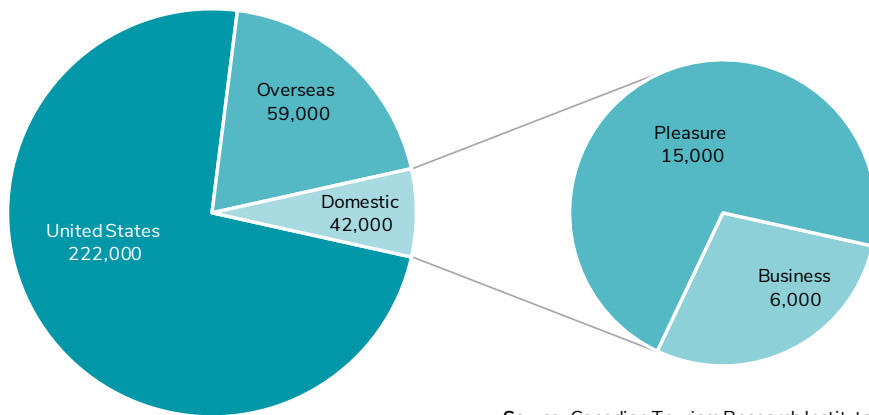
Overall, border crossings from Europe and Asia increased year-over-year, at nearly 26,200 and 10,800 people, respectively.

Border crossings from Oceania increased by a modest 5% year-over-year, and border crossings from South America by 8%, to 10,400 and 1,100 people, respectively.

See page 17 for detailed data.

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Estimated overnight visitation to Yukon

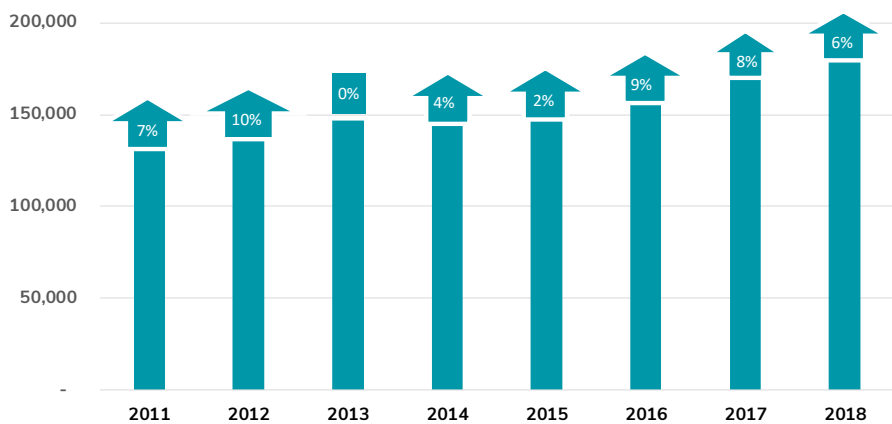


Source: Canadian Tourism Research Institute

HIGHLIGHTS

- The Canadian Tourism Research Institute estimates that Yukon saw 323,000 overnight visitors in 2018 an increase of 4.8% over 2017.
- Overnight visitors from the United States made up the bulk of the total visitors, estimated at 222,000, an increase of 4.9% over 2017.
- The largest percentage in year-over-year growth was seen among overseas visitors to Yukon, which were estimated to have increased in volume by 5.4%, to 59,000 visitors in 2018.

Air passenger arrivals at Erik Neilson Whitehorse International Airport 2011 to 2018

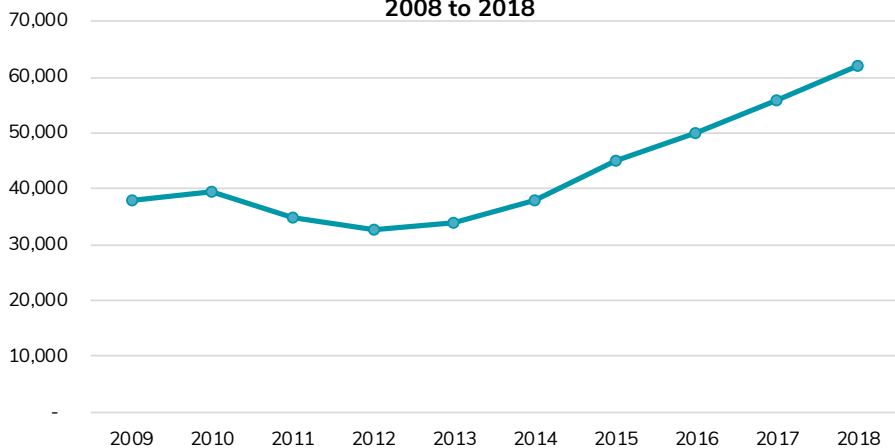


Source: Government of Yukon, HPW

- In 2018, over 194,000 people arrived at the Erik Neilson Whitehorse International Airport, an increase of 6% over 2017.
- Between 2011 and 2018, the total number of arrivals at the Whitehorse airport increased nearly 60,000 people. This represents a compound annual growth rate of 37% over the last seven years.
- Total passengers moving through the airport over the 2011 to 2018 period were also up more than 140,000 people. This represents a compound annual growth rate of 44% over the last seven years.

See page 18 for detailed data.

Non-residents camping in Yukon Government campgrounds, 2008 to 2018

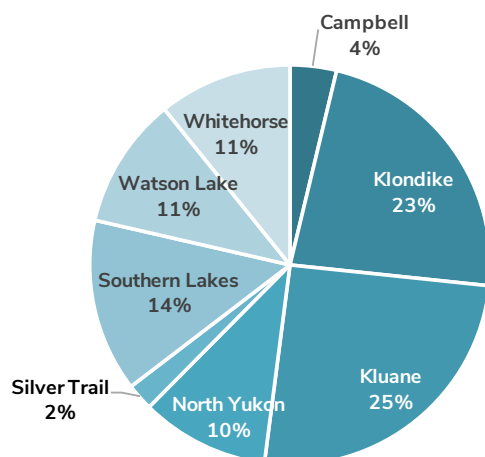


Source: Government of Yukon, Environment

- In 2018, nearly 61,900 non-residents camped at one of Yukon's 41 government campgrounds. This represents an increase of 11% over 2017.
- Compared to 2008, the number of non-residents camping at Yukon Government campgrounds has increased 70%.
- Of the total Yukon Government campground usage in 2018, more than twice as many non-residents (61,890) camped as residents (26,646); however, residents spent twice as many nights camping than non-residents.

2018 Year-End Report

Non-resident campsite nights in Yukon Government campgrounds, by region, 2018

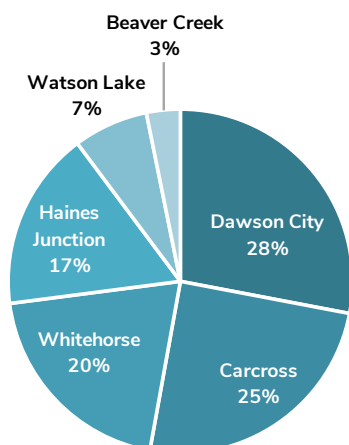


Source: Government of Yukon, Environment

HIGHLIGHTS

- In total, non-residents spent more than 33,400 nights in 2018 in Yukon Government campgrounds, an increase of 14% over 2017.
- Of the total non-resident campsite nights, campgrounds in the Klondike, Kluane and Southern Lakes regions were the most frequently used, together representing nearly two thirds of all non-resident campsite nights in Yukon Government campgrounds.

Yukon Visitor Information Centre Attendance May to September 2018

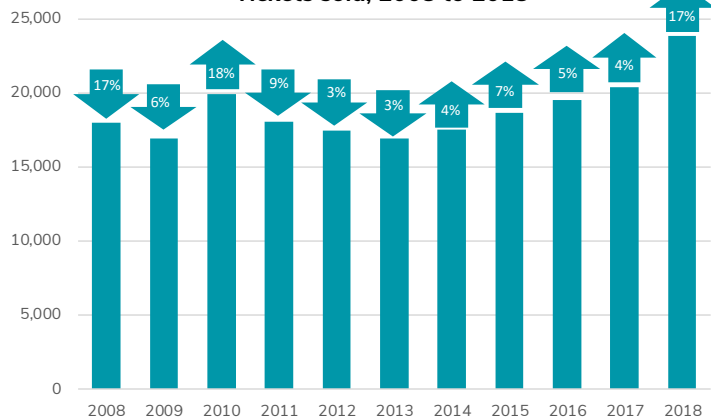


Source: Government of Yukon, Tourism and Culture

- Between May and September 2018, nearly 393,800 people went to one of Yukon's seven visitor information centres.
- Over the summer season, Dawson City saw the highest usage, followed by Carcross, Whitehorse and Haines Junction.
- The Whitehorse visitor information centre had around 80% of its total between May and September months. This proportion has remained relatively stable.

See page 19 for detailed data.

Yukon Beringia Interpretive Centre, Tickets sold, 2008 to 2018



Source: Government of Yukon, Tourism and Culture

- In 2018, nearly 24,900 tickets were sold for the Yukon Beringia Interpretive Centre, a 17% increase over 2017.
- On average, over the last 10 years, approximately 18,900 tickets were sold for the center annually. Ticket sales in 2018 surpassed the 10 year average by 26%.

See page 20 for detailed data.

2018 Year-End Report

HIGHLIGHTS

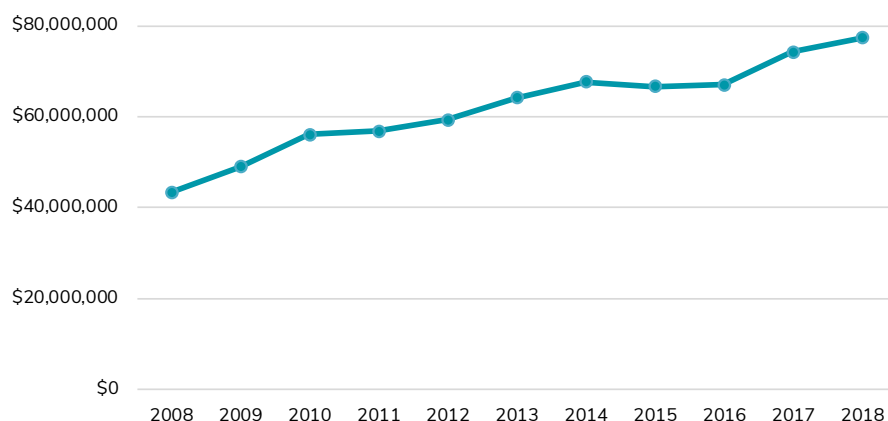
- Annual sales in food services and drinking places (restaurants) totaled \$77.3 million in Yukon in 2018, up 4.2% from 2017.
- Compared to 2008 (\$43.4 million), restaurant sales increased by \$34.0 million, or 78.4%.

See page 21 for detailed data.

- In 2018, retail sales for Yukon were \$833.5 million, an increase of 4% over 2017.
- Compared to 2008 (\$534.5 million), retail sales increased by \$296.8 million, or 59%.

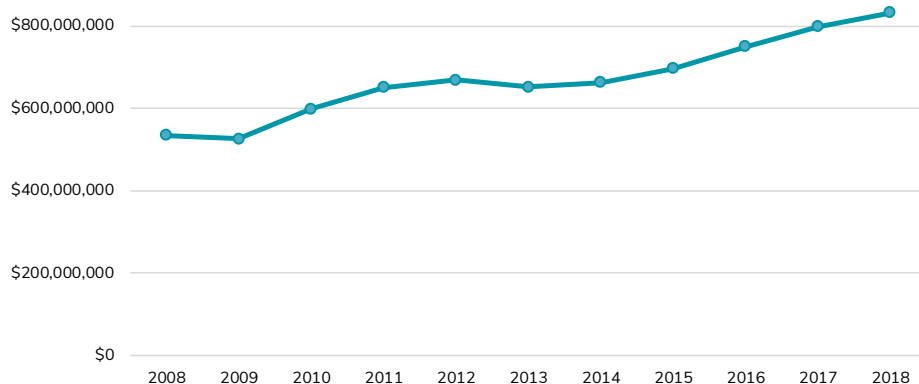
See page 21 for detailed data.

**Restaurant receipts
2008 to 2018**



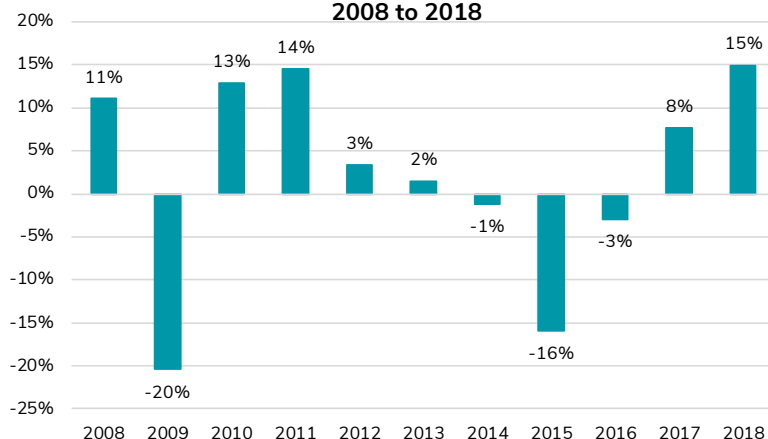
Source: Statistics Canada, Table: 21-10-0019-01

**Retail sales
2008 to 2018**



Source: Statistics Canada, Table: 20-10-0008-01

**Percent change in average self-serve regular fuel prices, Whitehorse
2008 to 2018**



Source: Government of Yukon, Finance

- In 2018, the average price of regular self-serve gasoline in Whitehorse was 135.0 cents per litre. This represents an increase of 17.6 cents per litre, or 15%, compared to the average price in 2017 (117.4 cents per litre).
- Comparing 2018 to 2008, the average cost of regular self-serve gasoline in Whitehorse increased 9.7 cents per litre, or 7.7%.

See page 21 for detailed data.

International border crossings (into Yukon) by port of entry

	TOTAL	BEAVER CREEK	FRASER/ WHITEHORSE	DAWSON/ LITTLE GOLD	PLEASANT CAMP	OLD CROW
	(total travellers)					
2018 DEC	4,050	1,715	1,370	0	965	0
NOV	4,443	2,309	1,208	0	926	0
OCT	10,208	4,962	2,855	2	2,389	0
SEP	64,009	12,808	45,535	1,748	3,918	0
AUG	116,465	17,804	85,684	6,394	6,583	0
JUL	118,339	17,876	86,018	7,072	7,373	0
JUN	102,477	12,785	77,758	5,707	6,225	2
MAY	57,381	6,688	46,157	813	3,721	2
APR	8,970	3,379	4,065	0	1,520	6
MAR	6,501	2,601	2,828	0	1,072	0
FEB	3,439	1,624	1,034	46	735	0
JAN	3,740	1,779	1,073	0	888	0
2017 DEC	3,819	1,751	1,369	0	699	0
NOV	4,502	2,398	1,119	0	985	0
OCT	10,131	5,095	2,632	2	2,402	0
SEP	55,756	12,081	37,532	2,198	3,944	1
AUG	101,489	16,977	71,050	6,758	6,704	0
JUL	102,058	18,523	69,543	6,589	7,400	3
JUN	88,131	12,591	64,789	5,459	5,292	0
MAY	46,634	6,722	35,120	844	3,947	1
APR	10,203	2,907	5,205	0	2,091	0
MAR	5,014	1,802	2,202	4	1,000	6
FEB	3,411	1,254	1,317	13	827	0
JAN	3,406	1,308	1,085	0	1,013	0
2018	500,022	86,330	355,585	21,782	36,315	10
2017	434,554	83,409	292,963	21,867	36,304	11
2016	419,244	72,290	287,252	21,483	38,213	6
2015	405,120	63,863	285,324	21,315	34,596	22
2014	413,886	64,947	299,542	19,618	29,761	18

Source: Statistics Canada, Table: 24-10-0041-01

Notes: Yukon total is the sum of Canada Border Services Agency ports of entry into Yukon. Total excludes other travellers (immigrants and former residents, non-resident and Canadian crew).

Excludes travellers entering Yukon by land via British Columbia on the South Alaska and Stewart-Cassier Highways, the Northwest Territories on the Dempster Highway, or on domestic flights.

International border crossings (into Yukon) by origin

	TOTAL	UNITED STATES	CANADA	OVERSEAS
		(total travellers)		
2018 DEC	4,054	2,686	1,305	63
NOV	4,449	3,102	1,277	70
OCT	10,217	7,034	2,884	299
SEP	64,080	44,699	11,021	8,360
AUG	116,759	87,217	17,407	12,135
JUL	119,066	89,123	18,888	11,055
JUN	103,039	78,292	14,288	10,459
MAY	57,456	39,895	9,729	7,832
APR	8,980	4,779	3,954	247
MAR	6,504	3,799	2,548	157
FEB	3,441	2,195	1,171	75
JAN	3,743	2,454	1,239	50
2017 DEC	3,820	2,427	1,360	33
NOV	4,503	3,153	1,278	72
OCT	10,133	6,754	3,109	270
SEP	55,818	38,160	9,657	8,001
AUG	101,836	73,652	17,142	11,042
JUL	102,977	74,591	17,878	10,508
JUN	88,967	66,282	12,647	10,038
MAY	46,780	31,145	9,535	6,100
APR	10,211	4,852	5,081	278
MAR	5,014	3,017	1,821	176
FEB	3,413	1,964	1,351	98
JAN	3,407	2,102	1,251	54
2018	501,752	365,239	85,711	50,802
2017	436,879	308,099	82,110	46,670
2016	419,244	301,676	73,505	44,063
2015	405,120	292,962	67,906	44,252
2014	413,886	290,428	78,223	45,232

Source: Statistics Canada, Table: 24-10-0041-01

Notes: Yukon total is the sum of Canada Border Services Agency ports of entry into Yukon. Total excludes other travellers (immigrants and former residents, non-resident and Canadian crew). United States is the sum of United States residents entering Canada. Canadians includes Canadian residents returning from the U.S. and Canadian residents returning from countries other than the U.S. Overseas includes residents of countries other than the U.S. entering Canada.

Excludes travellers entering Yukon by land via British Columbia on the South Alaska or Stewart-Cassier Highways, the Northwest Territories on the Dempster Highway, or on domestic flights.

International border crossings (into Yukon) Top 10 countries, excluding Canada and United States

	GERMANY	AUSTRALIA	UNITED KINGDOM	SWITZERLAND	CHINA	NEW ZEALAND	INDIA	MEXICO	FRANCE	NETHERLANDS
	(total travellers)									
2018 DEC	7	8	8	0	16	0	4	0	10	0
NOV	5	6	5	4	6	3	0	1	6	1
OCT	55	27	14	16	38	16	11	6	22	6
SEP	1,852	1,660	1,123	512	328	81	247	225	164	157
AUG	2,974	1,784	952	841	824	527	435	287	298	375
JUL	2,706	1,505	1,062	885	497	516	455	460	339	320
JUN	2,143	1,762	1,189	574	415	688	218	408	311	277
MAY	662	1,996	1,252	145	433	415	301	202	92	141
APR	27	26	20	14	3	1	4	4	36	15
MAR	27	8	17	19	10	0	5	5	16	7
FEB	23	9	2	0	1	0	0	3	9	3
JAN	6	5	2	3	0	1	0	0	13	0
2017 DEC	2	2	0	0	4	0	4	0	10	1
NOV	21	1	7	4	8	4	6	0	3	0
OCT	45	20	23	22	29	4	9	4	40	6
SEP	1,682	1,604	993	515	469	206	209	211	163	226
AUG	2,817	1,511	761	932	824	309	354	310	289	313
JUL	2,564	1,409	759	1,035	459	363	517	358	275	342
JUN	2,220	2,210	1,116	554	440	329	155	335	200	294
MAY	682	1,689	696	192	658	178	129	224	107	107
APR	39	9	12	42	0	3	2	6	62	5
MAR	28	8	7	20	2	0	1	6	21	2
FEB	26	7	8	18	0	0	3	0	10	1
JAN	12	2	7	0	7	0	2	2	13	0
2018	10,487	8,796	5,646	3,013	2,571	2,248	1,680	1,601	1,316	1,302
2017	10,138	8,472	4,389	3,334	2,900	1,396	1,391	1,456	1,193	1,297
2016	9,896	7,328	4,079	3,145	3,428	1,253	1,547	722	1,551	1,166
2015	9,479	7,754	4,179	2,807	2,995	1,253	1,462	995	1,247	1,310
2014	9,110	9,026	4,533	3,342	2,830	1,372	1,348	969	1,462	1,372

Source: Statistics Canada, Table: 24-10-0003-01.

Notes: Total includes other travellers (immigrants and former residents, non-resident and Canadian crew).

Excludes travellers entering Yukon by land via British Columbia on the South Alaska or Stewart-Cassier Highways, the Northwest Territories on the Dempster Highway, or on domestic flights.

Air passenger movements at Erik Neilson Whitehorse International Airport

	TOTAL	ARRIVALS	DEPARTURES
	(total passengers)		
2018 DEC	30,124	14,790	15,334
NOV	27,383	13,547	13,836
OCT	30,028	14,419	15,609
SEP	53,298	17,938	20,027
AUG	48,373	23,730	24,643
JUL	46,969	23,677	23,292
JUN	37,439	19,415	18,024
MAY	29,272	14,067	15,205
APR	25,888	13,341	12,547
MAR	29,100	14,156	14,944
FEB	25,259	12,848	12,411
JAN	24,812	12,195	12,617
2017 DEC	28,153	14,036	14,117
NOV	24,170	11,837	12,333
OCT	27,717	13,266	14,451
SEP	43,383	16,756	18,597
AUG	45,252	22,240	23,012
JUL	35,353	21,796	21,587
JUN	35,692	18,549	17,143
MAY	26,352	13,924	12,418
APR	24,999	12,924	12,075
MAR	28,881	14,135	14,746
FEB	22,979	11,532	11,447
JAN	23,171	11,461	11,710
2018	392,612	194,123	198,489
2017	366,102	182,466	183,636
2016	341,028	169,448	171,580
2015	313,613	156,018	157,595
2014	311,168	153,353	157,815

Source: Government of Yukon, Department of Highways and Public Works, Aviation Branch.

Notes: Includes business, pleasure, and local air passenger movements. Includes Yukoners.

Yukon Visitor Information Centre attendance

	TOTAL	WHITEHORSE	BEAVER CREEK	CARCROSS	DAWSON CITY	HAINES JUNCTION	WATSON LAKE	AIRPORT
	(estimated visitors)							
2018 DEC	2,636	2,636	..	..	..	..	..	..
NOV	2,915	2,915	..	..	..	..	..	..
OCT	3,280	3,280	..	..	..	..	..	..
SEP	49,010	10,305	1,113	15,425	9,665	9,455	3,047	144
AUG	104,586	20,025	3,110	26,234	30,227	18,251	6,739	252
JUL	115,500	21,681	4,083	26,482	37,160	18,021	8,061	36
JUN	88,664	19,378	3,267	17,445	26,970	14,742	6,862	..
MAY	36,000	7,742	928	12,275	6,202	5,880	2,973	..
APR	2,739	2,739	..	..	..	..	..	..
MAR	2,800	2,800	..	..	..	..	..	..
FEB	3,154	3,154	..	..	..	..	..	..
JAN	2,836	2,836	..	..	..	..	..	..
2017 DEC	2,548	2,548	..	..	..	..	..	..
NOV	2,501	2,501	..	..	..	..	..	..
OCT	3,116	3,116	..	..	..	..	..	..
SEP	48,081	11,818	1,198	10,714	10,914	10,425	3,012	..
AUG	100,916	20,171	3,390	20,699	31,138	18,649	6,641	228
JUL	111,820	21,734	3,855	21,933	36,069	19,412	8,456	361
JUN	89,020	21,012	2,883	19,661	28,008	10,773	6,486	197
MAY	33,008	8,841	835	11,657	6,884	2,409	2,382	..
APR	2,677	2,677	..	..	..	..	..	..
MAR	2,965	2,965	..	..	..	..	..	..
FEB	3,016	3,016	..	..	..	..	..	..
JAN	3,127	3,127	..	..	..	..	..	..
2018	414,120	99,491	12,501	97,861	110,224	66,349	27,682	432
2017	402,795	103,526	12,161	84,664	113,013	61,668	26,977	786
2016	324,965	95,041	11,531	91,228	71,833	25,384	27,509	2,439
2015	252,349	88,400	12,866	64,256	37,569	22,074	23,742	3,442
2014	246,335	76,322	12,099	76,958	29,544	22,585	21,776	7,051

Source: Government of Yukon, Tourism and Culture, Visitor Services Unit.

Notes: In July 2016, the Dawson City VIC moved from counting guestbook signatures to using electronic door counters to estimate visitors to the centre. Haines Junction VIC moved to electronic door counters in June 2017. Given this change in methodology, year-over-year comparisons should not be made.

Yukon Beringia Interpretive Centre

	TOTAL (tickets sold)
2018 DEC	1,309
NOV	1,475
OCT	1,170
SEP	1,808
AUG	4,065
JUL	4,745
JUN	3,519
MAY	1,347
APR	1,303
MAR	1,670
FEB	814
JAN	673
2017 DEC	978
NOV	1,223
OCT	1,213
SEP	1,804
AUG	3,132
JUL	4,760
JUN	3,573
MAY	1,372
APR	1,560
MAR	821
FEB	815
JAN	410
2018	23,898
2017	21,661
2016	19,556
2015	18,705
2014	17,528

Source: Government of Yukon, Department of Tourism and Culture, Museums Unit.

Accommodation trends

	OCCUPANCY RATE	AVERAGE DAILY ROOM RATE	REVENUE PER AVAIL. ROOM
2018 DEC	43.9%	\$115	\$50
NOV	54.5%	\$130	\$71
OCT	55.1%	\$135	\$74
SEP	78.7%	\$157	\$124
AUG	91.1%	\$157	\$143
JUL	91.8%	\$159	\$146
JUN	91.0%	\$156	\$142
MAY	55.2%	\$154	\$85
APR	49.7%	\$132	\$65
MAR	57.6%	\$127	\$73
FEB	61.4%	\$121	\$74
JAN	43.2%	\$121	\$52
2017 DEC	41.2%	\$119	\$49
NOV	56.8%	\$123	\$70
OCT	56.2%	\$127	\$71
SEP	81.5%	\$144	\$117
AUG	88.4%	\$144	\$127
JUL	90.9%	\$147	\$134
JUN	86.0%	\$145	\$125
MAY	58.3%	\$142	\$83
APR	52.7%	\$116	\$61
MAR	59.7%	\$118	\$70
FEB	59.6%	\$115	\$69
JAN	46.2%	\$113	\$52
2018	64.4%	\$139	\$92
2017	64.8%	\$129	\$86
2016	65.2%	\$122	\$81
2015	66.5%	\$118	\$80
2014	68.3%	..	..

Source: CBRE Hotels. Trends in the Canadian Hotel Industry National Market Report.

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Due to increases in CBRE inventory, 2017 and 2018 data is not directly comparable to previous periods.

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

Restaurant receipts

	TOTAL (\$000)
2018 DEC	5,875
NOV	6,036
OCT	5,943
SEP	7,519
AUG	8,803
JUL	8,889
JUN	8,188
MAY	6,375
APR	5,426
MAR	5,214
FEB	4,548
JAN	4,530
2017 DEC	5,523
NOV	5,265
OCT	5,195
SEP	6,474
AUG	7,983
JUL	8,640
JUN	8,348
MAY	6,438
APR	5,542
MAR	5,480
FEB	4,927
JAN	4,381
2018	77,346
2017	74,196
2016	67,072
2015	66,605
2014	67,606

Source: Statistics Canada,
Table 21-10-0019-01.

Self-serve fuel prices Whitehorse

	REGULAR	PREMIUM (cents/litre)	DIESEL
2018 DEC	124.0	136.3	138.3
NOV	141.9	152.3	139.7
OCT	143.6	153.2	138.3
SEP	143.5	153.7	137.6
AUG	143.7	153.3	136.6
JUL	143.9	153.7	135.9
JUN	144.0	153.2	136.5
MAY	141.6	150.1	135.5
APR	129.5	137.7	130.8
MAR	123.4	132.8	130.1
FEB	120.1	129.4	130.2
JAN	120.3	130.0	127.8
2017 DEC	122.6	122.6	124.8
NOV	129.3	137.3	124.8
OCT	112.4	122.4	117.7
SEP	115.3	124.7	112.7
AUG	110.2	119.4	111.4
JUL	111.2	121.7	112.3
JUN	114.5	124.1	114.9
MAY	116.5	125.3	115.3
APR	118.6	127.1	115.2
MAR	119.4	127.6	115.9
FEB	119.2	127.4	117.7
JAN	119.4	127.9	115.1
2018	135.0	144.6	134.8
2017	117.4	126.4	116.5
2016	109.2	118.5	106.9
2015	112.1	120.1	123.0
2014	133.6	143.3	146.1

Source: Government of Yukon, Department of Finance,
Yukon Bureau of Statistics.

Exchange rates

	UNITED STATES DOLLAR	EUROPEAN EURO	UNITED KINGDOM POUND	CHINESE RENMINBI	AUSTRALIAN DOLLAR
	(VALUE OF \$100 CAD)				
2018 DEC	\$134	€ 153	£170	¥19	\$96
NOV	\$132	€ 150	£170	¥19	\$96
OCT	\$130	€ 149	£169	¥19	\$93
SEP	\$130	€ 152	£170	¥19	\$94
AUG	\$130	€ 151	£168	¥19	\$96
JUL	\$131	€ 153	£173	¥20	\$97
JUN	\$131	€ 153	£174	¥20	\$98
MAY	\$129	€ 152	£173	¥20	\$97
APR	\$127	€ 156	£179	¥20	\$98
MAR	\$129	€ 160	£181	¥20	\$100
FEB	\$126	€ 155	£176	¥19	\$99
JAN	\$124	€ 152	£172	¥19	\$99
2017 DEC	\$128	€ 151	£164	¥19	\$98
NOV	\$128	€ 150	£171	¥19	\$97
OCT	\$126	€ 148	£169	¥19	\$98
SEP	\$123	€ 148	£166	¥19	\$97
AUG	\$126	€ 149	£163	¥19	\$100
JUL	\$127	€ 146	£165	¥19	\$99
JUN	\$133	€ 149	£170	¥20	\$101
MAY	\$136	€ 150	£176	¥20	\$101
APR	\$134	€ 144	£170	¥20	\$101
MAR	\$134	€ 143	£165	¥19	\$102
FEB	\$131	€ 140	£164	¥19	\$100
JAN	\$132	€ 140	£163	¥19	\$98
2018	\$133	€ 147	£180	¥20	\$98
2017	\$130	€ 146	£167	¥19	\$99
2016	\$132	€ 147	£180	¥20	\$99
2015	\$128	€ 142	£195	¥20	\$96
2014	\$110	€ 147	£182	¥18	\$100

Source: Bank of Canada.

Notes: Average of exchange rates based on market rates in terms of United States dollars, converted into Canadian dollars at noon EST.

Index of Consumer Confidence

	CANADA	ONTARIO	PRAIRIES	BRITISH COLUMBIA
	(2014 = 100)			
2018 DEC	103.0	90.4	61.6	137.9
NOV	114.2	106.8	78.1	135.0
OCT	119.6	112.9	77.8	140.0
SEP	115.3	106.6	76.4	129.0
AUG	117.9	106.9	82.5	120.0
JUL	116.2	102.8	80.1	132.4
JUN	116.3	109.1	79.8	123.2
MAY	120.8	111.1	83.3	135.4
APR	118.1	105.7	89.8	119.2
MAR	117.1	111.4	80.0	133.3
FEB	112.0	108.1	71.2	114.9
JAN	121.8	113.3	82.0	150.7
2017 DEC	128.3	123.5	86.5	157.4
NOV	121.1	110.5	83.6	144.8
OCT	116.6	112.2	78.3	134.7
SEP	112.4	112.5	76.7	107.6
AUG	121.7	118.5	80.1	136.0
JUL	113.6	113.4	73.8	118.0
JUN	111.5	100.6	77.5	131.0
MAY	111.5	102.4	76.5	136.2
APR	109.4	106.2	73.3	113.5
MAR	111.7	104.1	78.7	128.7
FEB	110.6	109.4	72.7	126.4
JAN	107.7	98.9	65.4	124.1
2018	116.0	107.1	78.6	130.9
2017	114.7	109.4	76.9	129.9
2016	97.0	99.4	58.0	115.4
2015	97.0	99.4	58.0	115.4
2014	100.0	100.0	100.0	100.0

Source: Conference Board of Canada.

Notes: The index of consumer confidence is a survey of Canadian households which measure consumers' levels of optimism regarding current economic trends. It summarizes attitudinal questions on employment prospects, financial position (current and expected), and whether or not it is a good time to make a major purchase.