

Yukon Tourism Indicators Year-End Report 2014



Overview

The *Yukon Tourism Indicators Year-End Report 2014* is published by Tourism and Culture as a companion to the monthly *Yukon Tourism Visitation Report*. This document is intended to provide a snapshot of tourism indicators for Yukon for the 2014 calendar year. Although the most current information available was used in this publication, all data are subject to future revisions.

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Unless otherwise stated, throughout this report, all border crossings figures are counts of people crossing in private vehicles (automobiles, motorcycles, cyclists, and pedestrians), motorcoaches, and on direct international commercial flights. Border crossings exclude counts of people crossing in commercial vehicles, trains, and marine arrivals.

Unless otherwise stated, total border crossing figures include Yukon residents. Fraser and Pleasant Camp border crossings are included in Yukon totals, even though there is the possibility that people crossing here may never physically enter Yukon.

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2014 Tourism Review

Yukon Visitor Tracking Program ¹

An estimated 443,300 people visited Yukon in 2014. Compared to the record-setting number of visitor to Yukon in 2013, this was a decrease of approximately 9,900 people, or 2.2%. The decline occurred over the peak summer months (May to September), which were down 11,000 people, or 2.9%, compared to the previous year. However, offsetting this decrease was an increase in the shoulder season (January to April, and October to December), which was up approximately 1,100 people, or 1.4%, over 2013.

Yukon Border Crossings

According to Canada Border Services Agency (CBSA), between January and December 2014, 341,707 people crossed international borders into Yukon. Compared to the record high in 2013, this was a decrease of 8,388 people, or 2.4%.

Seasonally, compared to 2013, border crossings were down 10,282 people, or 3.2%, through Yukon's peak (May to September) tourist season. Offsetting this decline was an increase in border crossings in the shoulder season (January to April, and October to December) which were up 1,894 people, or 5.9%, compared to 2013.

By mode of crossing, private vehicle and motorcoach crossings fell by 4.9% (down 9,876 people) and 5.7% (down 8,314 people), respectively. However these decreases were partially offset by increases in air border crossings, rising 213.8% (up 9,802 people). Of the increase in air crossings, the majority (91.3%) were in Dawson City.

Data for visitation by nationality indicates that border crossings from United States (US) residents, Yukon's largest tourism market, was down 3.8% compared to the previous year, totaling 222,084 people in 2014. While 2014 saw 8,818 fewer people crossing from the US, US border crossings still accounted for the majority (65.0%) of all crossings in 2014.

Canadian (excluding Yukon resident) border crossings decreased to 33,132, down 264 people, or 0.8% from 2013. Border crossings from all other international locations increased 9.1% to 43,865 people. The increase in border crossings from international travellers was attributable to strong increases in both Asia/Pacific and European regions, up 9.8% and 8.7%, respectively over 2013.

Visitor Information Centres

Yukon's Visitor Information Centres (VICs) reported a slight decline in visitation. In 2014, there were 246,335 people counted at seven VICs, a 0.6% decrease over the year prior.

Erik Nielsen Whitehorse International Airport Passenger Traffic

Air traffic through Erik Nielsen Whitehorse International Airport increased 6.3% in 2014. The Whitehorse airport reported 153,353 total passengers deplaning (arrivals) and 157,815 enplaning (departures), an increase of 4.3% and 8.4%, respectively, over 2013.

¹ The Yukon Visitor Tracking Program (YVTP) is a volumetric model that estimates the number of people that visit Yukon on a monthly basis. The model includes visitors entering Yukon via highway, train and air; it excludes Yukon residents.

2015 Yukon Tourism Outlook

Tourism performance is affected by many factors including the global economy, socio-cultural issues and activities, and environmental issues. Below is a snapshot of factors anticipated to impact travel to Yukon in 2015.

The global economy is still slowly recovering from the 2008 economic recession. The International Monetary Fund's *World Economic Outlook* projects that global economic growth will be 3.3% in 2014 and 3.8% in 2015. The majority of that growth is projected to originate from emerging markets and developing economies, such as China and India.

The economies of Canada and the US are projected to grow by 2.3% and 2.2% respectively in 2014 — forecasts for 2015 suggest these increases will continue. In 2015, the US is expected to continue to improve its economic status through an improving labour market and better household balance sheets.

Although European markets have begun to recover, recovery is slow and tentative. The outlook for European markets is subdued, with projected growth in real GDP of 1.5% in 2014 and 1.9% in 2015.

Several factors are expected to work in Yukon's favour for tourism in 2015, including:

- A weaker Canadian dollar that will make Yukon more affordable for US and overseas visitors and may make Canadians more inclined to vacation in their own country;
- Lower oil prices, which are being reflected in lower gasoline prices, that will lead to decreased costs of operating a motor vehicle and operational costs for airlines;
- Increased awareness of Yukon as a travel destination through the Yukon NOW marketing initiatives; and
- Improved air access to the territory, including Air North's direct flights between Whitehorse, Yellowknife and Ottawa that will continue to make Yukon more accessible to eastern Canada, and flights between Whitehorse and Kelowna that will continue to have a positive impact on visitation from British Columbia.

Note: 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.

Sources: Yukon Bureau of Statistics, *Socio-Economic Web Portal*. January 2015.
International Monetary Fund, *World Economic Outlook*. October 2014.
Economic Development, *Yukon Economic Outlook*. January 2015.

Yukon Monthly Visitation Estimates

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	PEAK	SHOULDER	TOTAL
2013	9,000	9,000	11,800	12,200	49,300	81,700	95,400	92,000	59,100	14,300	9,900	9,600	377,500	75,700	453,200
2014	9,000	8,400	11,200	11,500	47,400	77,200	90,200	90,300	61,400	15,800	10,800	10,100	366,500	76,800	443,300
Change %	0%	-7%	-5%	-6%	-4%	-6%	-5%	-2%	4%	11%	10%	5%	-3%	1%	-2%

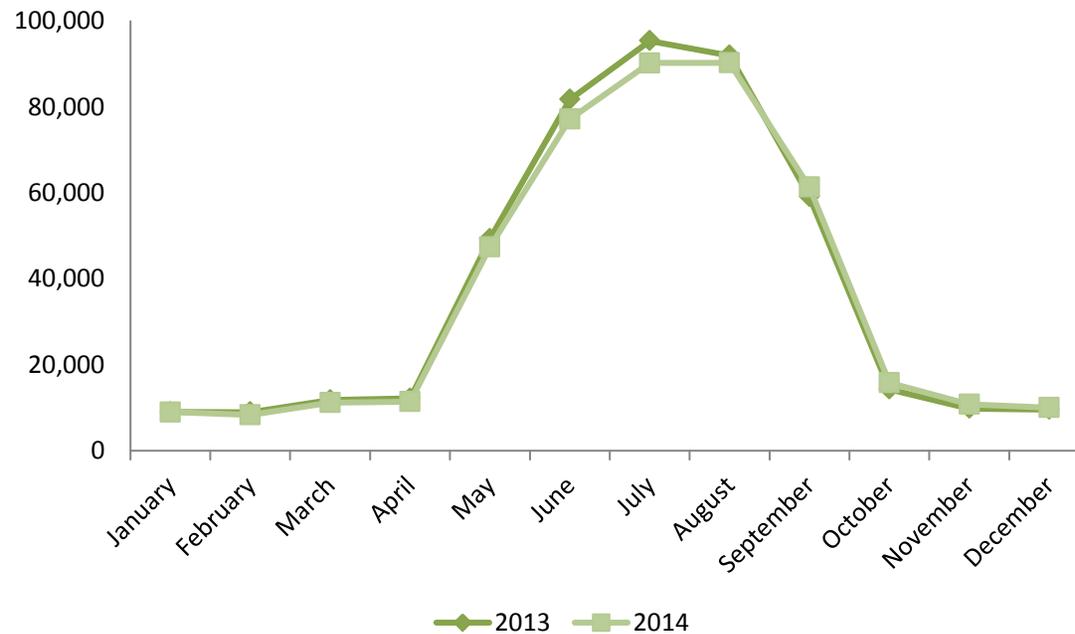
Note: The Yukon Visitor Tracking Program (YVTP) is a volumetric model that estimates the number of people that visit Yukon on a monthly basis. The model includes visitors entering Yukon via highway, train and air; it excludes Yukon residents.

The peak season is the sum of visitation between May and September; the shoulder season is the sum of visitation between January and April, and October to December.

Percent changes are based on unrounded numbers.

Source: Department of Tourism and Culture.

Yukon Monthly Visitation Estimates
2013 and 2014



Note: The Yukon Visitor Tracking Program (YVTP) is a volumetric model that estimates the number of people that visit Yukon on a monthly basis. The model includes visitors entering Yukon via highway, train and air; it excludes Yukon residents.

Source: Department of Tourism and Culture.

Yukon Border Crossings: Monthly Statistics

2013	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	PEAK	SHOULDER	TOTAL
Private Vehicle	2,416	2,805	6,126	7,098	17,785	36,708	46,014	44,633	23,786	7,373	3,180	2,510	168,926	31,508	200,434
Motorcoach	54	17	17	30	18,434	35,188	37,581	35,264	18,425	40	26	0	144,892	184	145,076
Air	20	20	68	17	12	1,237	1,199	1,237	645	103	27	0	4,330	255	4,585
TOTAL	2,490	2,842	6,211	7,145	36,231	73,133	84,794	81,134	42,856	7,516	3,233	2,510	318,148	31,947	350,095
US	1,647	1,835	3,091	4,021	22,767	50,094	57,924	53,964	26,812	4,825	2,228	1,694	211,561	19,341	230,902
Yukon	700	802	2,818	2,822	5,753	7,318	8,201	8,761	4,669	2,188	838	751	34,702	10,919	45,621
Canada	108	153	166	185	2,701	6,905	9,395	8,618	4,659	358	104	46	32,278	1,120	33,398
Others	35	52	136	117	5,010	8,816	9,274	9,791	6,716	145	63	19	39,607	567	40,174

2014	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	PEAK	SHOULDER	TOTALS
Private Vehicle	2,592	2,540	5,516	7,469	17,619	32,569	41,266	40,972	25,172	7,737	3,777	3,329	157,598	32,960	190,558
Motorcoach	0	20	9	42	16,560	30,138	33,860	34,519	21,558	13	15	28	136,635	127	136,762
Air	2	41	515	71	1,307	3,543	3,654	4,102	1,027	100	0	25	13,633	754	14,387
TOTAL	2,594	2,601	6,040	7,582	35,486	66,250	78,780	79,593	47,757	7,850	3,792	3,382	307,866	33,841	341,707
US	1,727	1,663	2,918	3,254	21,828	44,897	53,424	51,492	31,086	5,090	2,593	2,112	202,727	19,357	222,084
Yukon	692	762	2,269	3,844	6,337	6,336	6,132	7,531	4,558	2,115	989	1,061	30,894	11,732	42,626
Canada	142	97	761	323	2,430	6,340	8,869	9,136	4,259	468	149	158	31,034	2,098	33,132
Others	33	79	92	161	4,891	8,677	10,355	11,434	7,854	177	61	51	43,211	654	43,865

Change in Yukon Border Crossings between 2013 and 2014

Change	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	PEAK	SHOULDER	TOTAL
Private Vehicle	176	-265	-610	371	-166	-4,139	-4,748	-3,661	1,386	364	597	819	-11,328	1,452	-9,876
Change %	7%	-9%	-10%	5%	-1%	-11%	-10%	-8%	6%	5%	19%	33%	-7%	5%	-5%
Motorcoach	-54	3	-8	12	-1,874	-5,050	-3,721	-745	3,133	-27	-11	28	-8,257	-57	-8,314
Change %	-100%	18%	-47%	40%	-10%	-14%	-10%	-2%	17%	-68%	-42%	-	-6%	-31%	-6%
Air	-18	21	447	54	1,295	2,306	2,455	2,865	382	-3	-27	25	9,303	499	9,802
Change %	-90%	105%	657%	318%	10792%	186%	205%	232%	59%	-3%	-100%	-	215%	196%	214%
TOTAL	104	-241	-171	437	-745	-6,883	-6,014	-1,541	4,901	334	559	872	-10,282	1,894	-8,388
Change %	4%	-8%	-3%	6%	-2%	-9%	-7%	-2%	11%	4%	17%	35%	-3%	6%	-2%
US	80	-172	-173	-767	-939	-5,197	-4,500	-2,472	4,274	265	365	418	-8,834	16	-8,818
Change %	5%	-9%	-6%	-19%	-4%	-10%	-8%	-5%	16%	5%	16%	25%	-4%	0%	-4%
Yukon	-8	-40	-549	1,022	584	-982	-2,069	-1,230	-111	-73	151	310	-3,808	813	-2,995
Change %	-1%	-5%	-19%	36%	10%	-13%	-25%	-14%	-2%	-3%	18%	41%	-11%	7%	-7%
Canada	34	-56	595	138	-271	-565	-526	518	-400	110	45	112	-1,244	978	-266
Change %	31%	-37%	358%	75%	-10%	-8%	-6%	6%	-9%	31%	43%	243%	-4%	87%	-1%
Others	-2	27	-44	44	-119	-139	1,081	1,643	1,138	32	-2	32	3,604	87	3,691
Change %	-6%	52%	-32%	38%	-2%	-2%	12%	17%	17%	22%	-3%	168%	9%	15%	9%

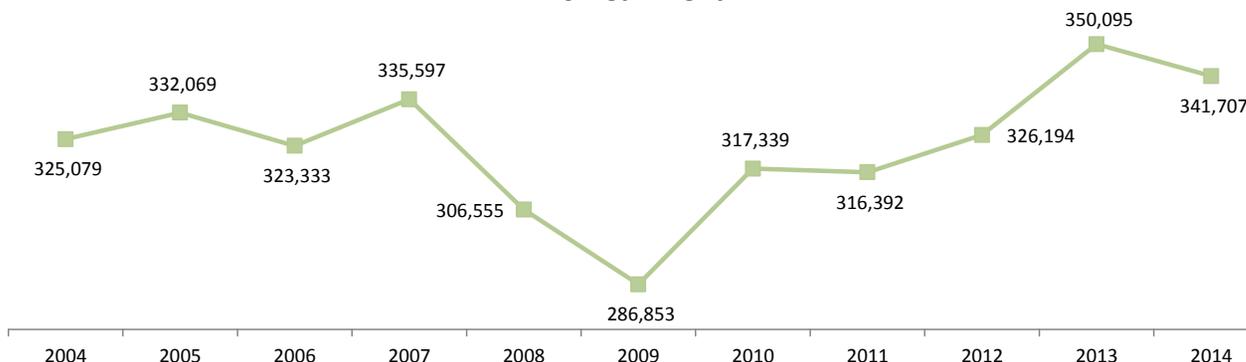
Notes: A major tour operator changed its business model in 2014 from transporting passengers by motorcoach from Fairbanks, AK to Dawson City to using flights. Consequently, direct international flights have increased exponentially and correspondingly, motorcoach crossings have decreased in 2014 compared to previous years.

Figures are counts of people crossing in private vehicles (automobiles, motorcycles, cyclists, and pedestrians), motorcoaches, and on direct international flights. Figures exclude counts of people crossing in commercial vehicles, trains, or marine arrivals.

The peak season is the sum of border crossings between May and September; the shoulder season is the sum of border crossings between January and April, and October to December.

Source: Canada Border Services Agency.

Yukon Border Crossings
10-Year Trend



Note: Figures are counts of people crossing in private vehicles (automobiles, motorcycles, cyclists, and pedestrians), motorcoaches, and on direct international flights. Figures exclude counts of people crossing in commercial vehicles, trains, or marine arrivals.

Source: Canada Border Services Agency.

Border Crossings by Port

Total	2013	2014	+/- change	% change
Beaver Creek	66,971	64,644	-2,327	-3.5%
Fraser	234,815	220,276	-14,539	-6.2%
Little Gold	17,646	12,582	-5,064	-28.7%
Pleasant	25,901	29,674	3,773	14.6%
Dawson City (Land)	179	150	-29	-16.2%
Dawson City (Air)	248	9,189	8,941	3605.2%
Whitehorse (Air)	4,321	5,192	871	20.2%
Old Crow (Air)	14	0	-14	-100.0%
TOTAL	350,095	341,707	-8,388	-2.4%

Notes: A major tour operator changed its business model in 2014 from transporting passengers by motorcoach from Fairbanks, AK to Dawson City to using flights. Consequently, air border crossings to Dawson City have increased exponentially and correspondingly, land crossings at Little Gold have decreased in 2014 compared to previous years.

Figures are counts of people crossing in private vehicles (automobiles, motorcycles, cyclists, and pedestrians), motorcoaches, and on direct international flights. Figures exclude counts of people crossing in commercial vehicles, trains, or marine arrivals.

Source: Canada Border Services Agency.

Yukon Border Crossings by Length of Stay

Same day	2013	2014	+/- change	% change
Private Vehicle	54,913	48,535	-6,378	-11.6%
Motorcoach	115,094	117,341	2,247	2.0%
Air	32	252	220	687.5%
TOTAL	170,039	166,128	-3,911	-2.3%
US	146,887	140,581	-6,306	-4.3%
Others	23,152	25,547	2,395	10.3%

One or more nights	2013	2014	+/- change	% change
Private Vehicle	82,920	83,344	424	0.5%
Motorcoach	14,355	5,193	-9,162	-63.8%
Air	3,766	11,284	7,518	199.6%
TOTAL	101,041	99,821	-1,220	-1.2%
US	84,019	81,503	-2,516	-3.0%
Others	17,022	18,318	1,296	7.6%

Notes: Canadians (including Yukon residents) are excluded from the above tables.

A major tour operator changed its business model in 2014 from transporting passengers by motorcoach from Fairbanks, AK to Dawson City to using flights. Consequently, direct international flights have increased exponentially and correspondingly, motorcoach crossings have decreased in 2014 compared to previous years.

Figures are counts of people crossing in private vehicles (automobiles, motorcycles, cyclists, and pedestrians), motorcoaches, and on direct international flights. Figures exclude counts of people crossing in commercial vehicles, trains, or marine arrivals.

Source: Canada Border Services Agency.

**Border Crossings by Visitor Nationality
Top 10 Countries**

Top 10 Countries	2013	2014	+/- change	% change
United States	230,902	222,084	-8,818	-3.8%
Canada	33,398	33,134	-264	-0.8%
Germany	8,263	8,955	692	8.4%
Australia	7,012	7,709	697	9.9%
United Kingdom	4,200	4,351	151	3.6%
Switzerland	2,808	3,246	438	15.6%
China	1,865	2,742	877	47.0%
India	1,321	1,327	6	0.5%
New Zealand	1,252	1,323	71	5.7%
Netherlands	967	1,226	259	26.8%

Notes: Canada figures exclude Yukon residents.
 Top 10 countries were selected based on highest number of people crossing by nationality in 2014.
 Figures are counts of people crossing in private vehicles (automobiles, motorcycles, cyclists, and pedestrians), motorcoaches, and on direct international flights. Figures exclude counts of people crossing in commercial vehicles, trains, or marine arrivals.
Source: Canada Border Services Agency.

**Border Crossings by Visitor Nationality
Key Regions**

Key regions	2013	2014	+/- change	% change
Total North America	265,122	256,187	-8,935	-3.4%
Total Europe	21,301	23,164	1,863	8.7%
Total Asia/Pacific	16,255	17,849	1,594	9.8%
Total Other	1,796	1,883	87	4.8%
TOTAL	304,474	299,083	-5,391	-1.8%

Notes: North America figures exclude Yukon residents.
 Figures are counts of people crossing in private vehicles (automobiles, motorcycles, cyclists, and pedestrians), motorcoaches, and on direct international flights. Figures exclude counts of people crossing in commercial vehicles, trains, or marine arrivals.
Source: Canada Border Services Agency.

Air Border Crossings Peak Tourism Season

Peak Season	2013	2014	+/- change	% change
May	12	1,307	1,295	10791.7%
June	1,237	3,543	2,306	186.4%
July	1,199	3,654	2,455	204.8%
August	1,237	4,102	2,865	231.6%
September	645	1,027	382	59.2%
Peak Season Total	4,330	13,633	9,303	214.8%
Shoulder Season Total	255	754	499	195.7%
GRAND TOTAL	4,585	14,387	9,802	213.8%

Note: A major tour operator changed its business model in 2014 from transporting passengers by motorcoach from Fairbanks, AK to Dawson City to using flights. Consequently, direct international flights have increased exponentially and correspondingly, motorcoach crossings have decreased in 2014 compared to previous years.

The peak season is the sum of border crossings between May and September; the shoulder season is the sum of border crossings between January and April, and October to December.

Source: Canada Border Services Agency.

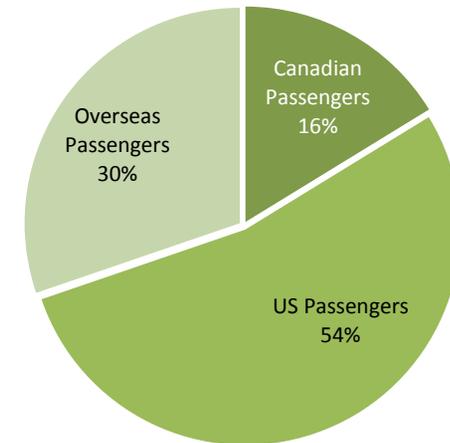
Air Border Crossings 2014 Peak Tourism Season

2014	Flights	Canadian Passengers	US Passengers	Overseas Passengers	Total
May	36	201	982	124	1,307
June	76	606	1,695	1,242	3,543
July	79	507	2,064	1,083	3,654
August	76	640	2,148	1,314	4,102
September	52	262	405	360	1,027
Peak Season Total	319	2,216	7,294	4,123	13,633
Shoulder Season Total	49	635	102	17	754
GRAND TOTAL	368	2,851	7,396	4,140	14,387

Note: The peak season is the sum of border crossings between May and September; the shoulder season is the sum of border crossings between January and April, and October to December.

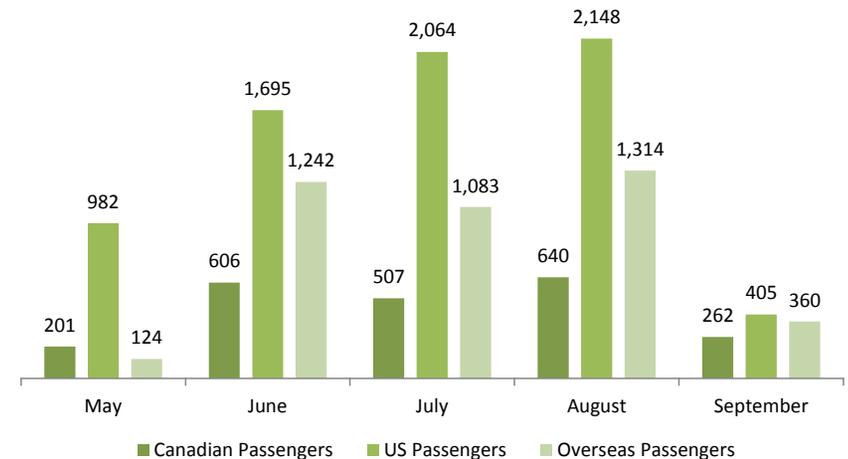
Source: Canada Border Services Agency.

Air Border Crossings by Nationality May to September 2014



Source: Canada Border Services Agency.

Air Border Crossings 2014 Peak Tourism Season



Source: Canada Border Services Agency.

Erik Nielsen Whitehorse International Airport: Passenger Traffic

Passenger Traffic	2013	2014	+/- change	% change
Enplaning	145,549	157,815	12,266	8.4%
Deplaning	147,049	153,353	6,304	4.3%
TOTAL	292,598	311,168	18,570	6.3%

Note: Includes all passengers arriving (deplaning) and departing (enplaning) on commercial flights from Erik Nielsen Whitehorse International Airport, January to December of the respective year.

Source: Department of Highways and Public Works.

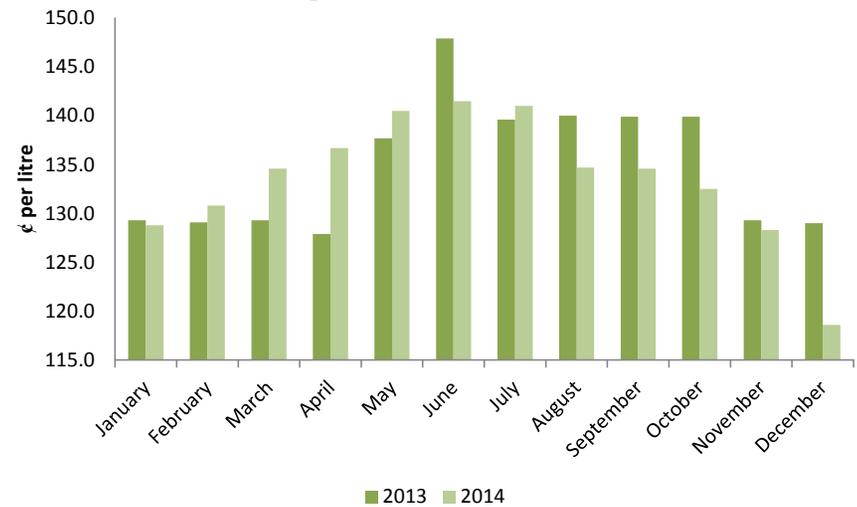
Yukon Visitor Information Centre Statistics

	2013	2014	+/- change	% change
Whitehorse	74,087	76,322	2,235	3.0%
Beaver Creek	15,034	12,099	-2,935	-19.5%
Carcross	74,029	76,958	2,929	4.0%
Dawson City	32,930	29,544	-3,386	-10.3%
Haines Junction	26,240	22,585	-3,655	-13.9%
Watson Lake	20,310	21,776	1,466	7.2%
Whitehorse Airport	5,088	7,051	1,963	38.6%
TOTAL	247,718	246,335	-1,383	-0.6%

Notes: Visitor Information Centre (VIC) statistics are captured via a counter at the door. They are not intended to be an accurate record of all visitations to Yukon. The Whitehorse VIC is open year-round. VICs across the rest of Yukon (Beaver Creek, Carcross, Dawson City, Haines Junction, Watson Lake and Whitehorse Airport) are open May to September. In 2014, the operating season of Yukon VICs were extended from May 1 to September 30.

Source: Department of Tourism and Culture.

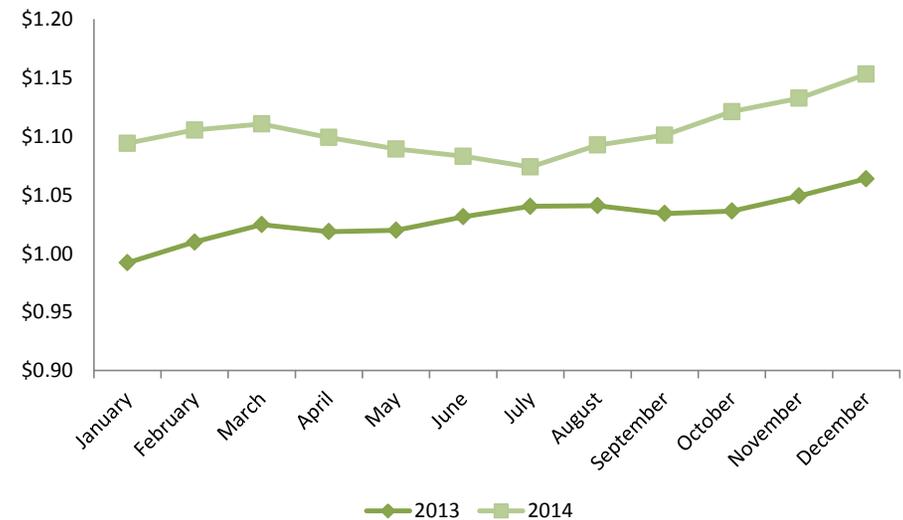
Average Fuel Prices: Whitehorse



Note: Fuel prices are the average price per litre of regular self-serve gasoline in Whitehorse, as calculated by the Yukon Bureau of Statistics.

Source: Yukon Bureau of Statistics. Socio-Economic Web Portal.

US Dollar Exchange Rates



Note: Figures are the average monthly value, as calculated by the Bank of Canada of 1USD in Canadian currency. Figures may differ from the rates provided by financial institutions or other market sources.

Source: Bank of Canada. Monthly Average Exchange Rates.