

Department of Tourism, Culture, Arts and Recreation (TCAR)  
2020 Tourism Highlights

- The number of non-resident automobile and air visitors travelling to the province reached 113,967 in 2020, a decrease of 76% compared to 2019 levels. With no cruise visitation in 2020, total non-resident visitation declined 79% from 2019.
- The number of non-resident automobile visitors travelling to the province reached 36,938 in 2020, a decrease of 61% compared to 2019.
- The number of non-resident air visitors travelling to the province is estimated to have reached 77,029 in 2020, a decline of 80% compared to 2019.
- The provincial accommodations occupancy rate reached 26.96% in 2020, a decrease of 19.3 points from 2019.

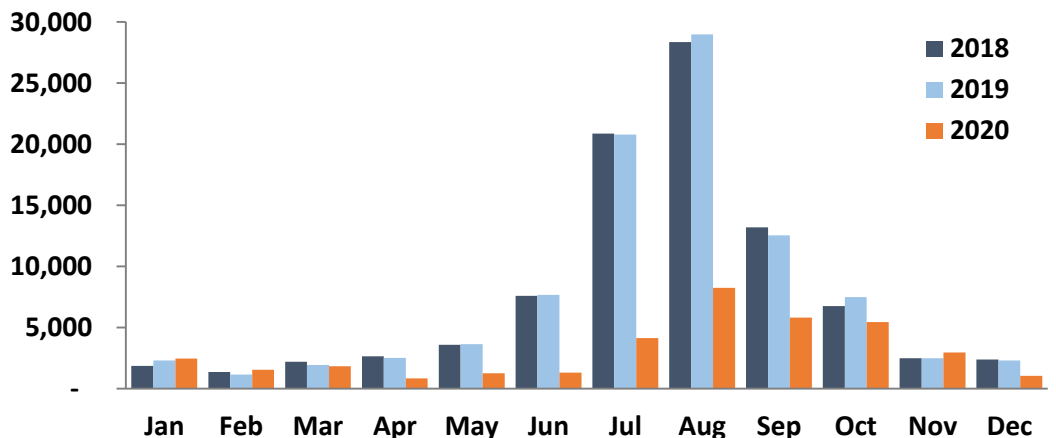
**Key Tourism Indicators 2020**

**Marine Atlantic**

- Overall, Marine Atlantic passenger movements (both directions) reached 149,836 in 2020, a decrease of 52% compared to 2019. Passenger-related vehicle (PRV) movements declined by 54% during the same period, from 119,295 to 55,200. The number of crossings declined from 1,607 to 1,491, down 7%.
- Due to the COVID-19 pandemic, Marine Atlantic has been implementing health and safety measures since April 2020, including limits of passengers per crossing. The Argentia ferry service, which normally operates from June to September, was suspended by Marine Atlantic for the 2020 season. During the June to September operating period in 2019, the Argentia route accounted for 14% of passengers and 16% of PRVs respectively.
- The number of non-resident automobile visitors travelling to the province is estimated to have reached 36,938 in 2020, a decrease of 61% over 2019 levels.



**Newfoundland and Labrador Non-resident Automobile Visitors 2018 to 2020**

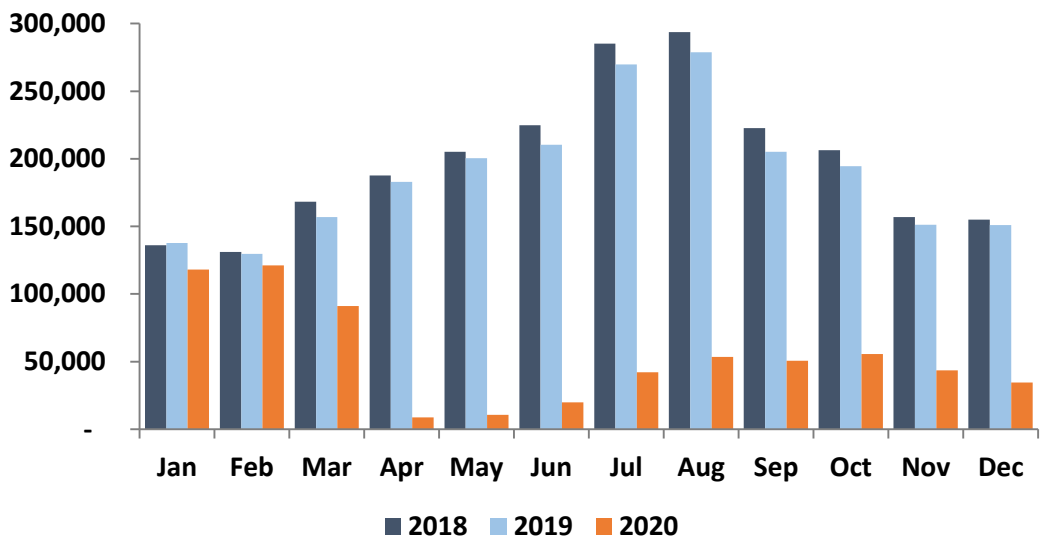


## Air Passenger Movements

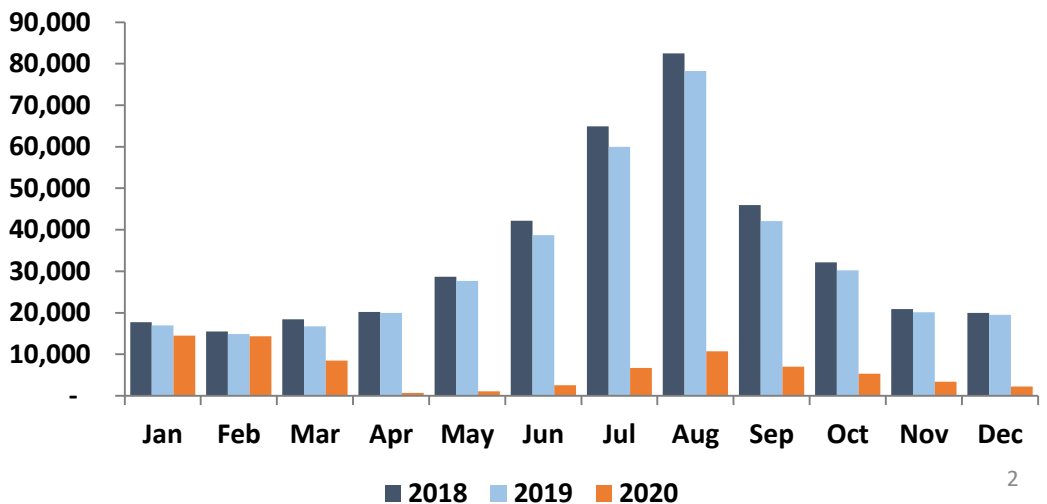
- Airport activity (boarding and deplaning passenger movements) for St. John's, Gander, Deer Lake, Stephenville, St. Anthony, Goose Bay and Wabush reached 648,929 passenger movements in 2020, a decrease of 71% compared to 2019.
- The number of non-resident air visitors travelling to the province reached an estimated 77,029 in 2020, a decline of 80% compared to 2019.
- Due to the travel restrictions put in place worldwide and decreasing demand for air services, airline capacity has been severely impacted, including capacity to Newfoundland and Labrador. Inbound non-stop seat capacity to NL (7 major airports) decreased 62% in 2020 compared to 2019 (440,058 seats compared to 1,161,723 in 2019).



**Newfoundland and Labrador Airport Passenger Movements 2018 to 2020**



**Newfoundland and Labrador Non-resident Air Visitors 2018 to 2020**

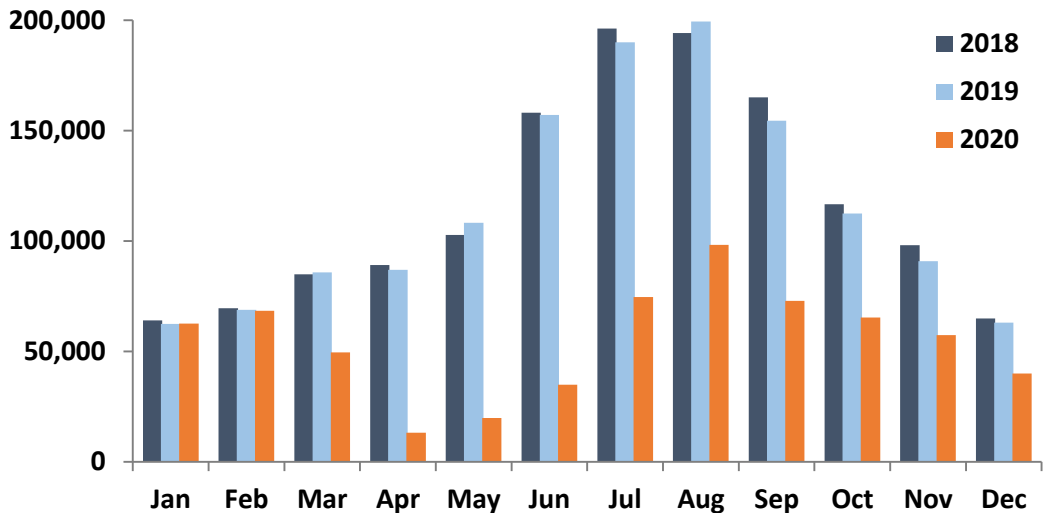


## Accommodations

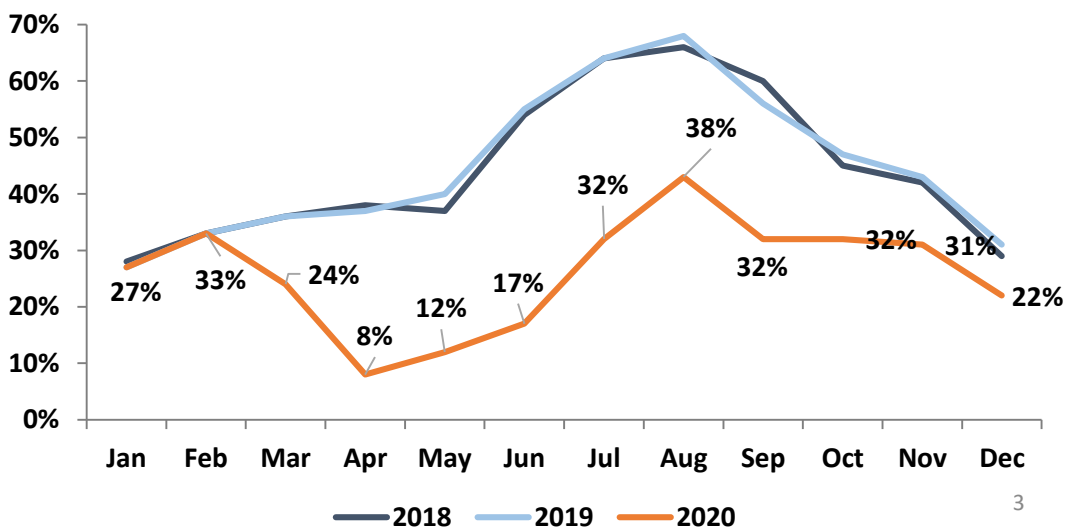
- Note: all accommodations data are preliminary and subject to change pending further reporting by operators.
- Accommodation occupancy as reached 26.96% in 2020, a decrease of 19.3 points compared to 2019.
- In 2020, licenced accommodations in the province reported 2,435,391 **room nights available** compared to 2,985,189 room nights available for the same period in 2019 (-18%). This reduction in room nights available can be attributed to a number factors, including several accommodations remaining closed for periods of time during the COVID-19 pandemic, as well as lower levels of occupancy statistics reporting compared to previous years.
- In 2020, licenced accommodations in the province reported 656,595 **room nights sold**, a decrease of 52% from 2019. **Total room revenue** reached \$78.2 million in 2020, a decline of 59% from 2019.



Newfoundland and Labrador Accommodation Room Nights Sold 2018 to 2020



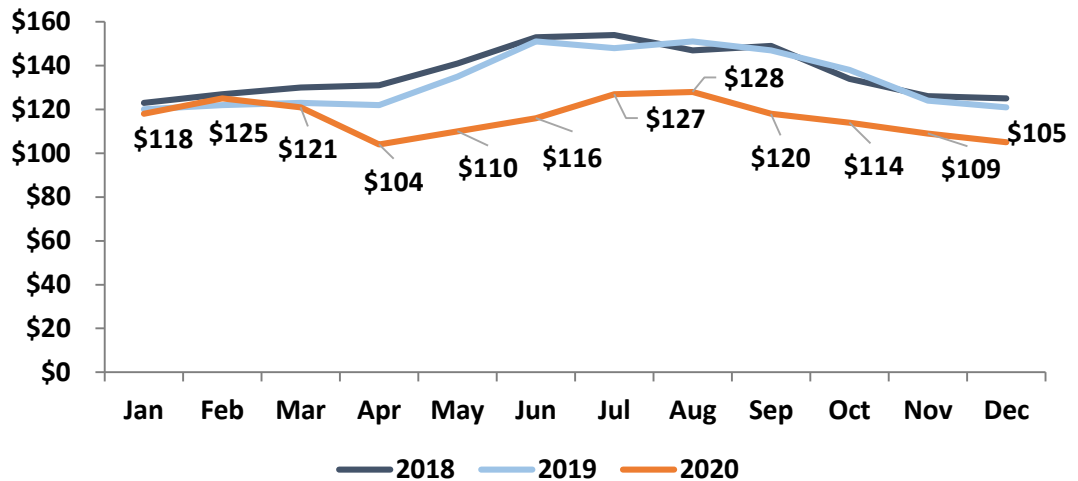
Newfoundland and Labrador Accommodation Occupancy Rate 2018 to 2020



## Accommodations

- The **average daily rate** reached \$119 in 2020, a decrease of 14% compared to 2019 (\$138).

**Newfoundland and Labrador Accommodation Average Daily Rate 2018 to 2020**



## Key Trends and Impacts on Tourism Activity YTD 2020

### COVID-19's Impact on Global Tourism

The Coronavirus pandemic in early 2020 led to a virtual stop of all travel activity across the globe, with all non-essential travel strongly discouraged or even prohibited and many jurisdictions closing their borders to visitors. According to the United Nations World Tourism Organization (UNWTO), international tourist arrivals dropped 74% in 2020, translating into a loss of approximately US\$1.3 trillion in export revenues from international tourism which is more than eleven times the loss recorded during the 2009 global economic crisis. The UNWTO's extended scenario models suggest recovery to 2019 levels will take between two and a half to four years while 43% of the UNWTO's Panel of Experts surveyed did not see a return to pre-pandemic levels until 2023, with another 41% suggesting it will be 2024 or later.

### COVID-19's Impact on National and Provincial Tourism

#### **Air Access**

- Due to the travel restrictions put in place worldwide and collapsing demand for air travel, airline capacity has been severely impacted. Inbound non-stop seat capacity to NL (7 major airports) decreased 62% in 2020 compared to 2019 (440,058 seats compared to 1,161,723 in 2019), with May alone decreasing 90% to just 11,800 inbound non-stop seats. Despite increasing to over 30,000 for the July to October period, inbound seat capacity for these months was between 64% and 77% lower than during the respective months in 2019.
- Some services from major markets, e.g., Halifax and Toronto to Deer Lake, Gander and Goose Bay were completely suspended in April and May, with some resuming gradually in June at significantly reduced levels. Seasonal services between Edmonton and St. John's, Calgary and St. John's, Ottawa and St. John's, Toronto and Stephenville as well as Toronto and Gander were completely suspended.
- On June 30, 2020, **Air Canada** announced the indefinite suspension of services on 30 domestic regional routes, including seven routes affecting NL airports (Deer Lake-Goose Bay; Deer Lake-St. John's; Gander-Goose Bay; Gander-St. John's; Wabush-Goose Bay; Wabush-Sept-Iles, QC; Goose Bay-St. John's). The announcement also advised of the closing of eight Air Canada stations at regional airports in Canada, including Wabush in this province.

- On October 14, 2020, **WestJet** announced it was indefinitely suspending operations to Moncton, Fredericton, Sydney and Charlottetown, and significantly reduce service to Halifax and St. John's. The suspension eliminated more than 100 flights weekly or almost 80% of seat capacity from the Atlantic region starting November 2, 2020, including the suspension of the St. John's – Toronto service.

### **Travel Restrictions & Travel Bubbles**

- While some Canadian provinces had no travel restrictions and no self-isolation requirements for domestic travellers in 2020 (e.g. BC, AB, SK, ON), other provinces/territories (e.g. NS, MB for some visitors) had self-isolation measures in place and/or continue to prohibit non-essential travel into their province (e.g. NL, NB, PEI).
- Across global jurisdictions as well as in Canada, “travel bubbles” emerged whereby residents of certain origins are allowed to visit certain other jurisdictions without the requirement to self-isolate upon arrival. An Atlantic Canadian “travel bubble” was announced on June 24, 2020, allowing for residents of the 4 Atlantic Canadian provinces to visit each province without the requirement of self-isolation as of July 3, 2020. This allowed residents of NL to travel to NB, NS and PEI and residents from these three provinces to visit NL. Due to rising COVID-19 infections, the Atlantic bubble was suspended on November 26, 2020.
- Although non-resident tourism in the province received a boost through the Atlantic Canada “travel bubble”, resident travel played an essential role to generate tourism activity. Newfoundland and Labrador Tourism launched the Stay Home Year tourism campaign on June 24, 2020 aimed at encouraging residents to spend their vacation in NL in 2020. TCAR research (November 2020) indicated that 43% of residents took an overnight leisure trip in the province between June and October, taking an average of 2 trips during that period, with an average trip length of 3.9 nights.

### **National Tourism Spending**

- Statistics Canada’s National tourism indicators for 2020 showed that tourism spending declined by 48.1%, while tourism GDP declined 47.9% annually. Domestic tourism spending declined 38.6% but its share of total tourism spending increased significantly from 78.4% in 2019 to 92.7% in 2020 as international tourism was severely impacted by border closures and other pandemic-related safety measures. Spending by international visitors to Canada declined 82.5% in 2020.
- Modelling by Tourism Economics on behalf of Destination Canada (March 2020, updated in July 2020) estimated that domestic travel spending in Canada in 2020 would decline by 33% (\$27.8 billion) to 55% (\$46.3 billion). The report noted that Canadians expect to spend less on travel and vacations than they did before COVID-19 (DC, Bank of Canada research) and that travel activity would be impacted by lower consumer confidence due to high unemployment levels and the risk of COVID-19 resurgence. With travel restrictions remaining in place and international borders remaining closed, it is assumed that domestic travel improves gradually and that Canadians convert some of their international travel spending to spending at domestic destinations.

## Background Tourism Performance 2017 – 2020

- The number of non-resident air, automobile and cruise visitors travelling to the province reached an estimated 113,967 in 2020, a decrease of 78.5% compared to 2019. Total in-province expenditures by non-residents were estimated to reach \$130.3 million, a decrease of 76.3% compared to 2019.
- The number of non-resident air visitors travelling to the province reached an estimated 77,029 in 2020, a decrease of 80.0% compared to 2019. In-province expenditures by non-resident air visitors were estimated at \$88.1 million, a decrease of 79.9% compared to 2019.
- Non-resident automobile visitation to the province reached an estimated 36,938 visitors in 2020, a decrease of 60.6% compared to 2019. In-province expenditures by non-resident auto visitors were estimated at \$42.2 million, a decrease of 60.5% compared to 2019.

### 2017 – 2019 Non-resident Visitors by Mode of Transportation

Non-resident visitors	2017	2018	2019	2020	Year-over-Year Change 2019-20
Non-resident visitors – air	412,901	409,047	384,278	77,029	-80.0%
Non-resident visitors – auto	101,899	93,298	93,818	36,938	-60.6%
<b>Sub-total (air &amp; auto)</b>	<b>514,800</b>	<b>502,345</b>	<b>478,096</b>	<b>113,967</b>	<b>-76.2%</b>
Non-resident visitors – cruise	38,321	31,162	52,371	0	-100.0%
<b>Grand Total</b>	<b>553,121</b>	<b>533,507</b>	<b>530,467</b>	<b>113,967</b>	<b>-78.5%</b>

### 2017 – 2019 Non-resident In-Province Expenditures by Mode of Transportation (\$ million)

In-Province Expenditures	2017	2018	2019	2020	Year-over-Year Change 2019-20
Non-resident expenditures – air	\$458.5	\$462.1	\$438.6	\$88.1	-79.9%
Non-resident expenditures – auto	\$113.2	\$105.2	\$106.8	\$42.2	-60.5%
<b>Sub-total (air &amp; auto)</b>	<b>\$571.7</b>	<b>\$567.3</b>	<b>\$545.4</b>	<b>\$130.3</b>	<b>-76.1%</b>
Non-resident expenditures – cruise	\$3.5	\$2.9	\$4.9	\$0	-100.0%
<b>Grand Total</b>	<b>\$575.2</b>	<b>\$570.2</b>	<b>\$550.3</b>	<b>\$130.3</b>	<b>-76.3%</b>

## **About These Statistics**

The Sector Research Division (Tourism), Department of Tourism, Culture, Industry and Innovation is responsible for the maintenance of a travel/tourism data base that permits the monitoring of various statistical indicators. This is achieved through the co-operation of many industry stakeholders and Departmental staff that provide data to the division on a regular basis. This summary could not be prepared without them.

This comprehensive travel and tourism database includes as its primary/core indicators counts of marine and air passenger movements (including estimates of non-resident visitors) at the major entry/exit points in the province. Secondary indicators includes performance measures/visitation statistics for numerous facilities and sites in the province as well as the collection of detailed operating statistics for the province's accommodation sector (availability, sales, occupancy and related revenues for all licensed operators).

This can be accessed at <https://www.gov.nl.ca/tcar/tourism-division/visitor-and-market-insights/>

Department of Tourism, Culture, Arts and Recreation, Tourism Research Division, June 9, 2021

2020 DEPARTMENT OF TOURISM, CULTURE, ARTS & RECREATION FLASH SHEET - KEY TRAVEL AND TOURISM INDICATORS YEAR-TO-DATE (YTD)

Indicator	YTD	YTD Change	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Number of Marine Atlantic Crossings (Both Directions) <sup>1</sup>	1,491	-7%	105	92	104	94	116	120	152	156	144	154	132	122
Passenger Traffic on Marine Atlantic (Both Directions) <sup>2</sup>	149,836	-52%	8,252	7,180	9,906	4,336	6,595	7,579	20,540	28,721	20,784	18,653	11,619	5,671
Non-Residents Exiting (auto) <sup>3</sup>	36,938	-61%	2,458	1,540	1,830	846	1,259	1,321	4,152	8,224	5,823	5,456	2,959	1,050
Residents Exiting (auto) <sup>4</sup>	35,425	-40%	2,045	1,982	2,161	1,075	1,984	2,290	5,162	6,229	4,487	3,857	2,543	1,610
Vehicle Traffic on Marine Atlantic (Both Directions) <sup>5</sup>	55,200	-54%	2,840	2,256	3,659	1,187	1,767	2,346	7,879	11,179	8,641	7,407	4,283	1,756
Airport Passenger Movements <sup>6</sup>	648,929	-71%	117,948	121,160	91,165	8,718	10,582	19,719	42,154	53,514	50,575	55,482	43,442	34,470
Non-Resident Exiting (air) <sup>7</sup>	77,029	-80%	14,498	14,323	8,508	671	1,077	2,516	6,690	10,727	7,019	5,311	3,424	2,265
Roofed Accommodation Occupancy Rates <sup>8</sup>	26.96%	-19.3 points	27.28%	32.59%	24.07%	8.23%	11.87%	16.86%	31.70%	43.27%	32.71%	31.79%	30.81%	22.13%
Roofed Accommodation Room Nights Sold <sup>9</sup>	656,595	-52%	62,628	68,360	49,548	13,134	19,841	34,814	74,535	98,284	72,888	65,255	57,397	39,911
Provincial Museums <sup>10</sup>	25,128	-	3,440	5,453	3,179	-	-	44	2,669	4,125	3,392	2,826	-	-
Provincial Historic Sites <sup>11</sup>	15,596	-	-	-	-	-	-	-	3,982	8,208	2,856	550	-	-
National Historic Sites <sup>12</sup>	8,850	-	-	-	-	-	-	-	1,941	6,594	315	-	-	-
Provincial Visitor Information Centres (VICs) <sup>13</sup>	15,131	-	-	-	-	-	-	266	4,645	5,877	3,548	807	-	-

Notes:

1. The number of crossings between Newfoundland and Nov Scotia by Marine Atlantic (both directions)
2. Passengers carried (both directions) by Marine Atlantic
3. Non-resident auto visits
4. Residents exiting by Automobile: A decrease in residents means fewer residents leaving the province by automobile to travel to destinations outside the province. This may not necessarily translate into more in-province travel by residents.
5. Passenger-related traffic carried (both directions) by Marine Atlantic
6. Airport passenger movements at the province's seven major airports (St. John's, Gander, Deer Lake, Stephenville, St. Anthony, Goose Bay and Wabush)
7. Non-resident air visits: Estimates are based on results from the 2016 Provincial Exit Survey Program and 2020 airport boarding passenger volumes
- 8, 9. Roofed accommodation occupancy and room nights sold: Data is current as of June 2021 and is subject to revisions pending further reporting by the Province's operators.
10. Provincial Museums: The Rooms – January to December; Mary March museum, Seamen's museum – June 29-October 4; and Labrador Interpretation Centre – July 6 to October 4
11. Provincial Historic Sites: operating season to October
12. National Historic Sites: operating season to October, as available.
13. Visitors to the Provincial VICs cover the period June 27 – October 13, 2020

Source: Department of Tourism, Culture, Arts & Recreation; Tourism Research Division