

2023 HIGHLIGHTS

- Provincial tourism performance continued its recovery throughout 2023 across a range of indicators. Air visitation reached an estimated 304,300*, up 10% from 2022, while auto visitation reached 113,600, 3% above 2022 levels. Cruise visitation was strong once again in 2023, with the province welcoming 69,100 unique visitors, up 55% from 2022. Including cruise, **overall non-resident visitation** reached 487,000 in 2023, an increase of 13% from 2022.
- Recovery to pre-pandemic 2019 levels has been uneven across indicators, with auto and cruise visitation surpassing pre-pandemic levels in 2023, while air visitation continued to lag. Auto visitation closed out 2023 21% above 2019 levels, while cruise visitation was 32% higher. Air visitation, however, remained 21% below pre-pandemic levels, hampered by ongoing air capacity constraints which persisted through 2023. Overall air, auto and cruise visitation remains 8% below 2019 levels.
- The accommodations sector posted another strong year in 2023, with the occupancy rate (+7.3pts), room nights sold (+15%) and total room revenue (+22%) all up compared to 2022. Room night sales continued to surpass 2019 levels (+22%), while total room revenue was 39% higher. The occupancy rate in 2023 was 11.8 points above where it stood in 2019 while the average daily rate was 14% higher.

2023 NON-RESIDENT VISITORS (AIR, AUTO, CRUISE)



487,000

total visitors in 2023

↑ **13%** from 2022

↓ **8%** from 2019



304,300*
air visitors in 2023

↑ **10%** from 2022

↓ **21%** from 2019



113,600
auto visitors in 2023

↑ **3%** from 2022

↑ **21%** from 2019



69,100
cruise visitors in 2023

↑ **55%** from 2022

↑ **32%** from 2019

PROVINCIAL HISTORIC SITES & VISITOR INFORMATION CENTRES

Provincial Historic Sites



90,586**
visitors May-November

↓ **25%** from 2022

↓ **14%** from 2019

Visitor Information Centres



116,387
visitors May-October

↑ **13%** from 2022

↓ **7%** from 2019

ACCOMMODATIONS (2023)



58.0%
occupancy rate YTD

↑ **7.3 pts** from 2022

↑ **11.8 pts** from 2019



1,685,946
room nights sold YTD

↑ **15%** from 2022

↑ **22%** from 2019



\$266.8 million
total room revenue YTD

↑ **22%** from 2022

↑ **39%** from 2019



\$158
average daily rate (ADR) YTD

↑ **6%** from 2022

↑ **14%** from 2019

MARINE ATLANTIC PASSENGER MOVEMENTS²



368,039
total passenger movements YTD

↑ **4%** from 2022

↑ **19%** from 2019

AIRPORT PASSENGER MOVEMENTS¹



1,837,629
passenger movements YTD

↑ **16%** from 2022

↓ **15%** from 2019

SEAT CAPACITY



1,025,029
inbound non-stop seat capacity to NL in 2023

↑ **9%** from 2022

↓ **12%** from 2019

NOTES / SOURCES

- Passenger movements at the province's 7 major airports (St. John's, Gander, Deer Lake, Stephenville, St. Anthony, Wabush & Goose Bay). Non-resident air visitor count excludes Wabush due to unavailable data. Passenger movements for Wabush unavailable since April 2023.
 - Passengers carried (both directions) by Marine Atlantic
 - Roofed accommodation statistics reported in the NL Tourism Operator Portal; current as of January 2024 and subject to revision pending further reporting by registered operators; see note on 2023 occupancy statistics on page 4.
- *2023 estimates are preliminary and subject to change once final 2023 Visitor exit survey results are available.
 **Provincial Historic Sites had free admission in 2022 during Come Home 2022 celebrations, impacting 2023 YOY comparisons

2023 Summary

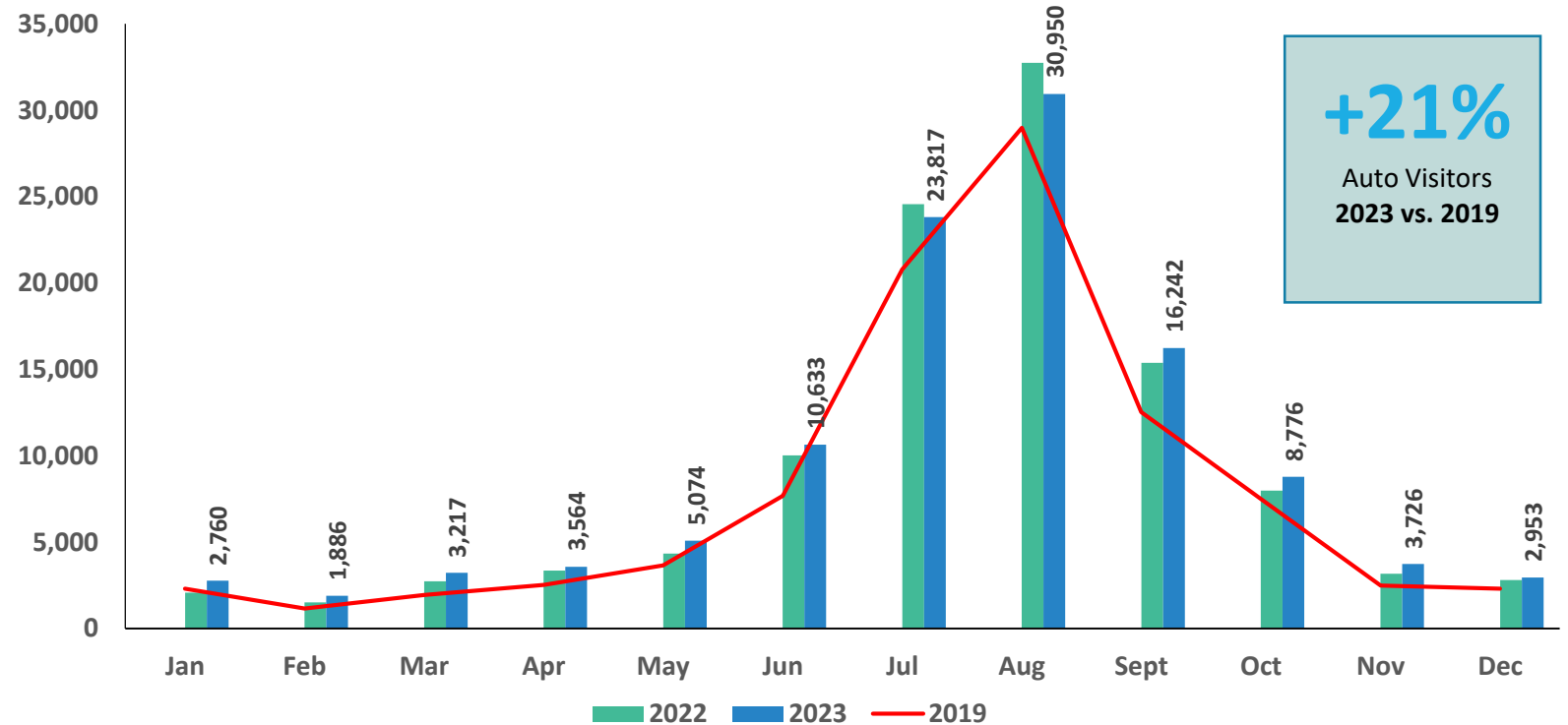
- **Ferry Passenger Movements:** Marine Atlantic passenger movements (both directions) reached 368,039 in 2023, an increase of 4% compared to 2022 (354,461) and up 19% from 2019 (309,909).
- **Passenger-related vehicle (PRV) movements** increased 3% during the same period, from 140,449 to 145,349. PRV movements in 2023 were up 22% from pre-pandemic 2019 levels. The number of **crossings** decreased slightly from 1,753 to 1,743, down 1% from 2022 but still 8% above 2019 levels.
- **Auto Visitors:** While the pace of growth slowed compared to 2022, auto visitation continued to show strength throughout 2023. The number of non-resident automobile visitors to the province is estimated to have reached 113,600 in 2023, an increase of 3% over the same period in 2022 and 21% higher than in 2019.

December 2023

- Passenger movements for the month of **December 2023** (13,189) were down 2% over December 2022 (13,398) but 12% above December 2019 levels (11,804). The number of PRV movements in December 2023 (4,978) decreased 7% compared to December 2022 (5,326) but remained 12% higher than in December 2019 (4,438).
- To close out the year, auto visitation in the month of **December 2023** (2,953) was 6% above December 2022 levels (2,798) and remained notably higher (+28%) than in December 2019 (2,305).

MARINE ATLANTIC PASSENGER MOVEMENTS & AUTO VISITATION

Newfoundland and Labrador Non-resident Auto Visitors 2019-2023



+21%
Auto Visitors
2023 vs. 2019

368,039
total passenger movements
(both directions) YTD
↑ 4% from 2022 ↑ 19% from 2019

145,349
passenger-related vehicle
movements YTD
↑ 3% from 2022 ↑ 22% from 2019

1,743
total ferry crossings
YTD
↓ 1% from 2022 ↑ 8% from 2019

2023 Summary

- Air Passenger Movements:** Airport activity (boarding and deplaning passenger movements) for St. John's, Gander, Deer Lake, St. Anthony, Goose Bay and Wabush* reached 1,837,629 passenger movements in 2023, an increase of 16% compared to 2022, recovering to 85% of 2019 levels.
- Air Visitors:** The number of non-resident air visitors to the province reached an estimated 304,300 in 2023, up 10% from 2022 and recovered to 79% of 2019 levels.

Note: Non-resident air visitor estimates are preliminary only and subject to change pending the final results of the 2023 Provincial Visitor Exit Survey

December 2023

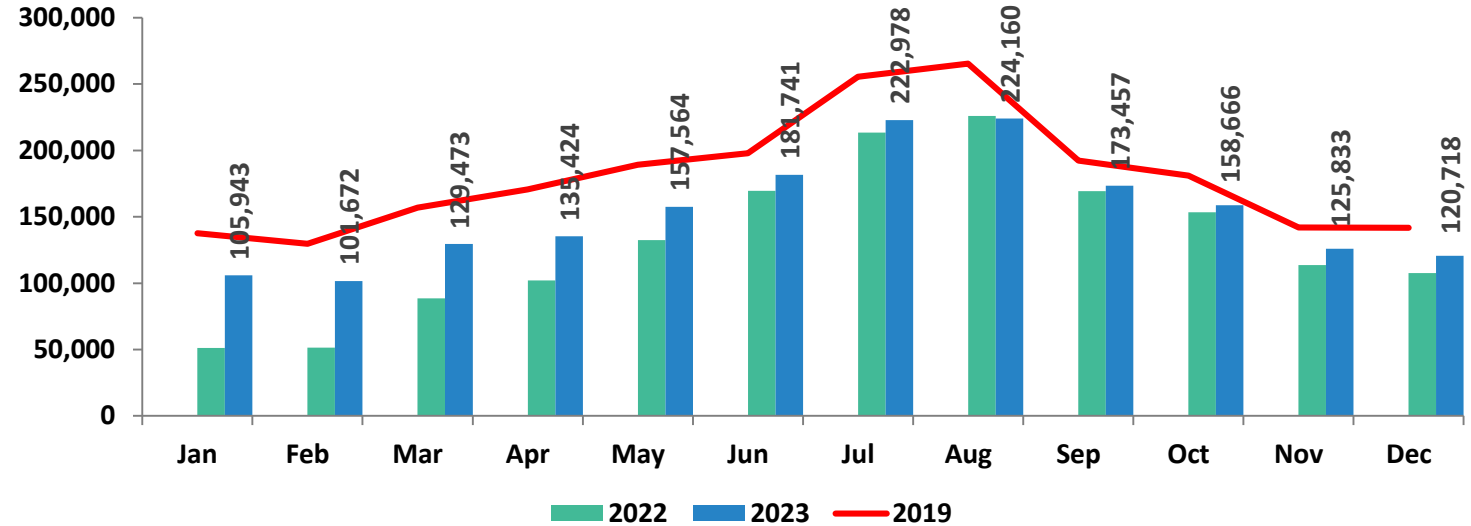
- Passenger movements for the month of **December 2023** (120,718) were up 12% from December 2022 (107,585) but remained 15% below December 2019 levels (141,732).
- For the month of **December 2023**, non-resident air visitation reached 14,200 11% above December 2022 (12,800) levels but 24% lower than in December 2019 (18,900).

Seat Capacity

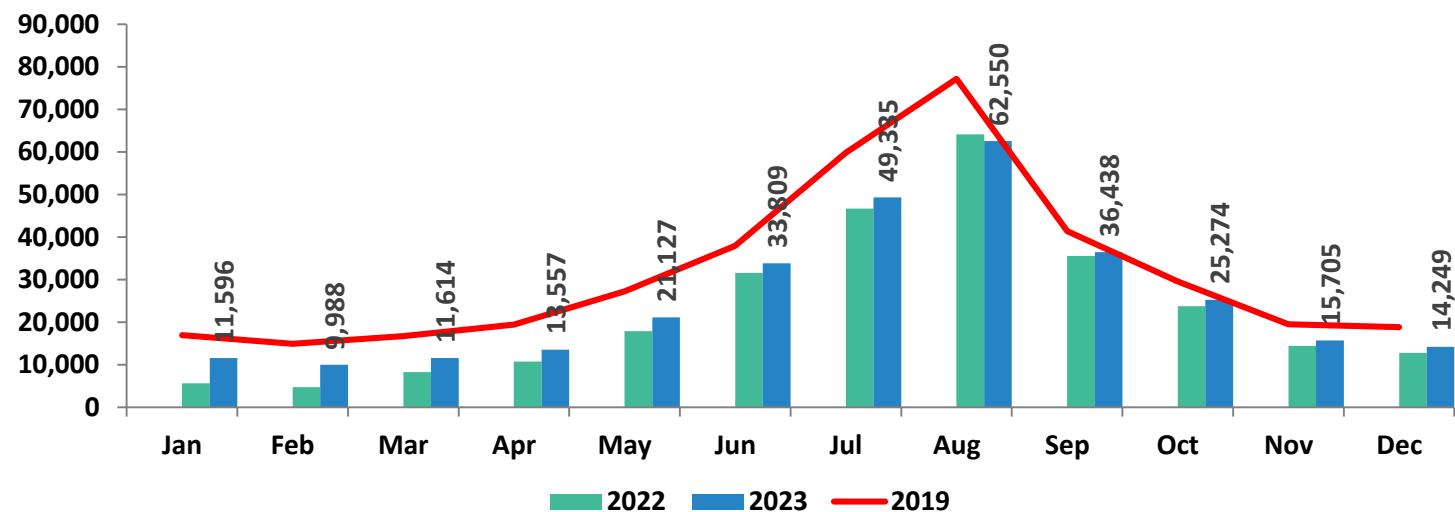
- Seat capacity has been rebuilding and air services have been recovering from the severe cuts during the COVID-19 pandemic. Inbound non-stop seat capacity to NL (7 major airports) has been benefiting from increased services from major markets as well as new airlines servicing the province. Monthly capacity has been increasing every month compared to the same month in the previous year since May 2021 until June 2023. September 2023 marked three months with seat capacity decreasing YoY (-5% July; -12% August; -6% September) while the last quarter of 2023 saw a healthy increase of 18%.
- The January to December 2023 period saw an increase of 9% in inbound seats compared to the same period in 2022 (1,025,029 seats versus 937,245 seats in 2022) but remains 12% below 2019 levels (1,161,723 seats). In 2023, capacity continues to build, however, monthly year-over-year increases were slowing, with July, August and September remaining below respective 2022 levels. Seat capacity increases during the last quarter were due to service extensions from seasonal to full year (e.g. St. John's – Calgary) and increased services from Halifax and Montreal.

AIR PASSENGER MOVEMENTS & VISITATION

Newfoundland and Labrador Airport Passenger Movements 2019-2023



Newfoundland and Labrador Non-resident Air Visitors 2019-2023



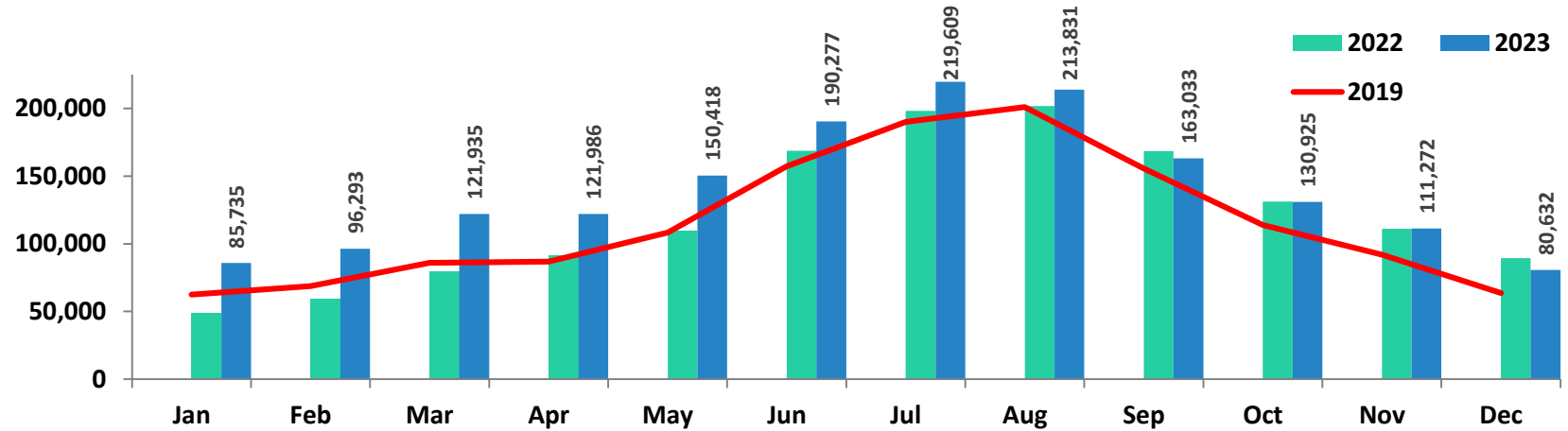
*Wabush data unavailable since April 2023

- Room Nights Sold:** In 2023, registered accommodations in the province reported 1,685,946 room nights sold, an increase of 15% from the same period in 2022. Total room night sales surpassed 2019 levels by 22%.
- Occupancy:** Accommodation occupancy reached 58.0% in 2023, an increase of 7.3 points compared 2022 (50.8%). The occupancy rate in 2023 was also 11.8 points above the pre-pandemic 2019 rate for the same period.
- Room Revenue:** Total room revenue reached \$266.8 million in 2023, up from \$218.6 million in 2022, an increase of 22%. Total room revenue has surpassed pre-pandemic 2019 levels by a substantial margin of 39%.
- Year-Over-Year (YOY) Growth:** Room nights sales continued to slow in the month of December (80,632), sitting 10% below December 2022 levels (89,680). Room night sales in December 2023, however, were 27% above December 2019 levels. Total room revenue for the month of December 2023 was \$12.4 million, up from \$11.2 million in December 2022, an increase of 10%. Room revenue for the month of December 2023 was also 61% higher than that recorded in December 2019. December occupancy reached 39.0%, a decrease of 1.7 points over December 2022 but 8.4 points higher than in December 2019.
- Note:** A number of rooms, especially in the St. John's area, currently allocated for use by the Department of Immigration, Population Growth and Skills is impacting performance of the registered accommodation sector. TCAR Tourism Research is assessing this impact, and adjustments will be made to reported figures as deemed necessary.

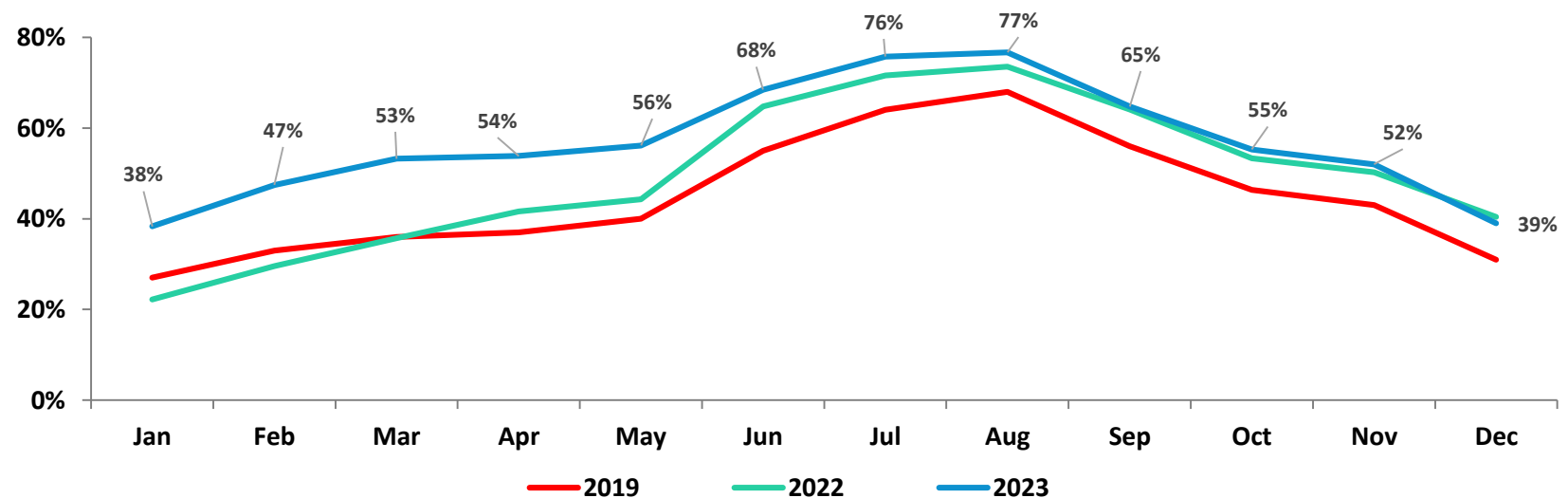
ACCOMMODATIONS SECTOR

REGISTERED ACCOMMODATIONS

NL Registered Accommodation Room Nights Sold 2019-2023



NL Registered Accommodation Occupancy Rate 2019-2023



- **Average Daily Rate (ADR):** The ADR reached \$158 in 2023, up 6% from 2022 (\$150), and up 14% from where it stood in 2019 (\$138).
- The ADR for the month of December reached \$153, up 23% from December 2022 (\$125) and 27% above the December 2019 rate (\$121).
- **Note:** all accommodations data are preliminary and subject to change pending further reporting by operators.

Important Notes:

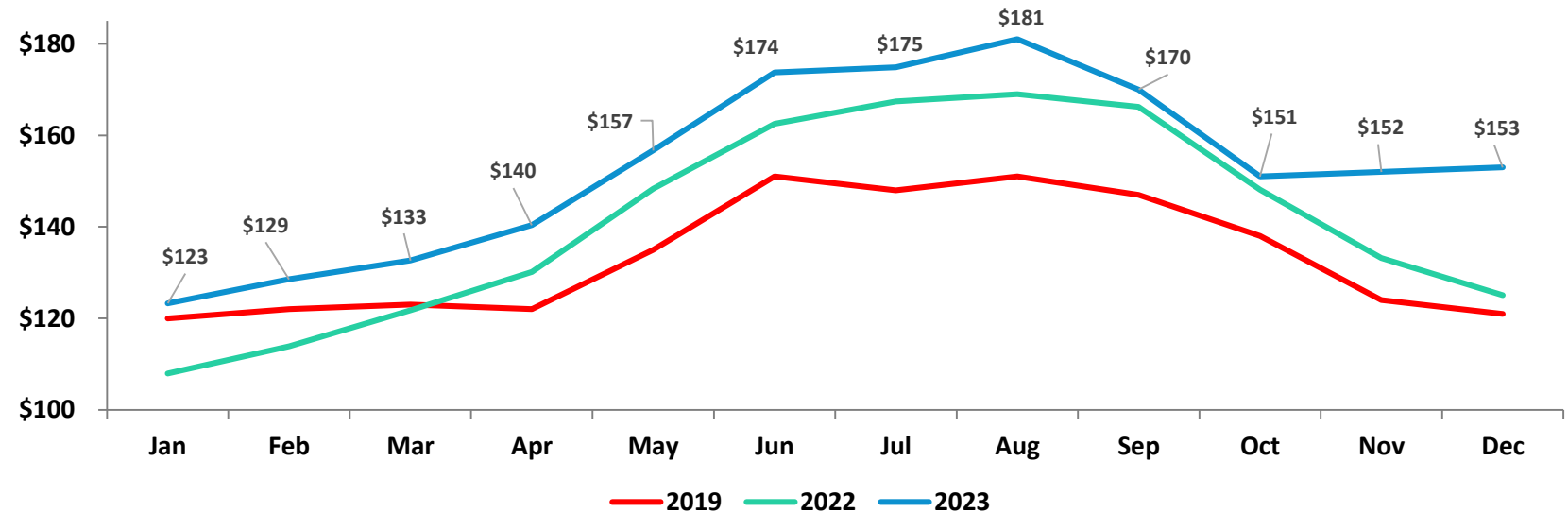
Short-term rental activity reports performance indicators for the province of Newfoundland and Labrador for accommodations that are listed on and booked through the short-term rental platforms Airbnb and Vrbo as reported by AirDNA. Performance is reported for listings which had at least one day classified as available or reserved during the reporting period. A *listing* can be any type of property, including entire homes, apartments, studios, cabins, vacation homes, tents, campers/RVs, individual hotel suites or rooms, B&Bs, and other types. Listings can comprise one room or multiple rooms that are rented as one unit.

Airbnb/Vrbo listings include registered accommodations as many operators use these platforms as channels to market their properties. Statistics for registered properties (e.g. nights available, nights booked, occupancy rate) are also included in the “Accommodations” section above.

ACCOMMODATIONS SECTOR

REGISTERED ACCOMMODATIONS

NL Registered Accommodation Average Daily Rate 2019-2023



SHORT-TERM RENTAL ACTIVITY (YTD DECEMBER)

NL Short-term Rental Listings (Airbnb, Vrbo) – Number of Available Listings

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	1592	1531	1572	1831	2392	2800	3041	3099	2924	2514	2082	2005
2023	2016	1897	2002	2241	2815	3226	3470	3540	3418	2989	2598	2414

NL Short-term Rental Listings (Airbnb, Vrbo) – Average Daily Rate 2022 and 2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	\$169	\$190	\$183	\$176	\$180	\$191	\$204	\$206	\$197	\$186	\$183	\$186
2023	\$184	\$192	\$192	\$179	\$192	\$202	\$213	\$214	\$199	\$187	\$180	\$174

*Average daily rates are reported in \$US and converted to \$C using the Bank of Canada monthly average exchange rates.

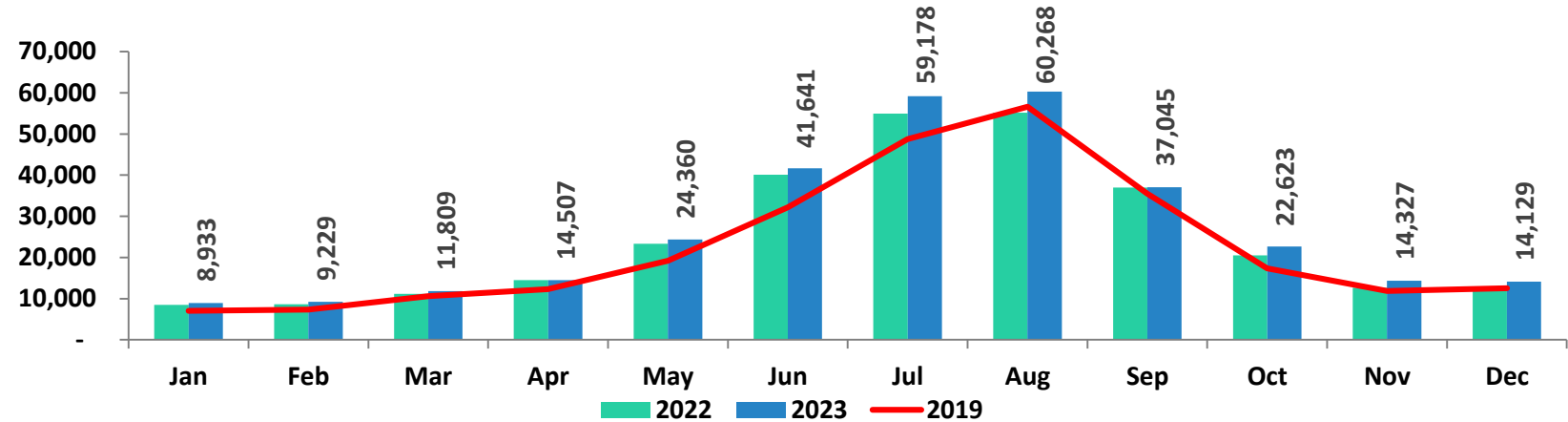
- Short-term Rental Listings:** According to AirDNA reporting, there were 2,414 listings in the province on the Airbnb and Vrbo short-term rental platforms in December 2023. This compares to 2,005 listings in December 2022 (+20%). Of these, 1,540 listings (64% of total listings) had at least one reservation during the month of December 2023. This compares to 1,322 booked listings (66%) in December 2022.
- Nights Available:** For the period January to December 2023, short-term rental properties in the province listed on Airbnb and Vrbo reported 656,490 **nights available** for bookings/reservations compared to 571,199 nights available for the same period in 2022 (+15%). Nights available for the month of December (39,808) were 18% higher than in December 2022 (33,801).
- Nights Booked:** From January to December 2023, short-term rental properties in the province reported 318,049 **room nights booked**, an increase of 6% compared to the same period in 2022 (299,151). Room nights booked in December 2023 (14,129) were 11% higher than in December 2022 (14,129).
- Occupancy:** The occupancy rate for short-term rental properties in the province reached 48.4% for the period January to December 2023, a decrease of 3.9 percentage points compared to the same period in 2022. The **average daily rate*** reached \$200 for the period January to December 2023, an increase of 3% compared to the same period in 2022 (\$193).

*Average daily rates are reported in \$US and converted to \$C using the Bank of Canada monthly average exchange rates

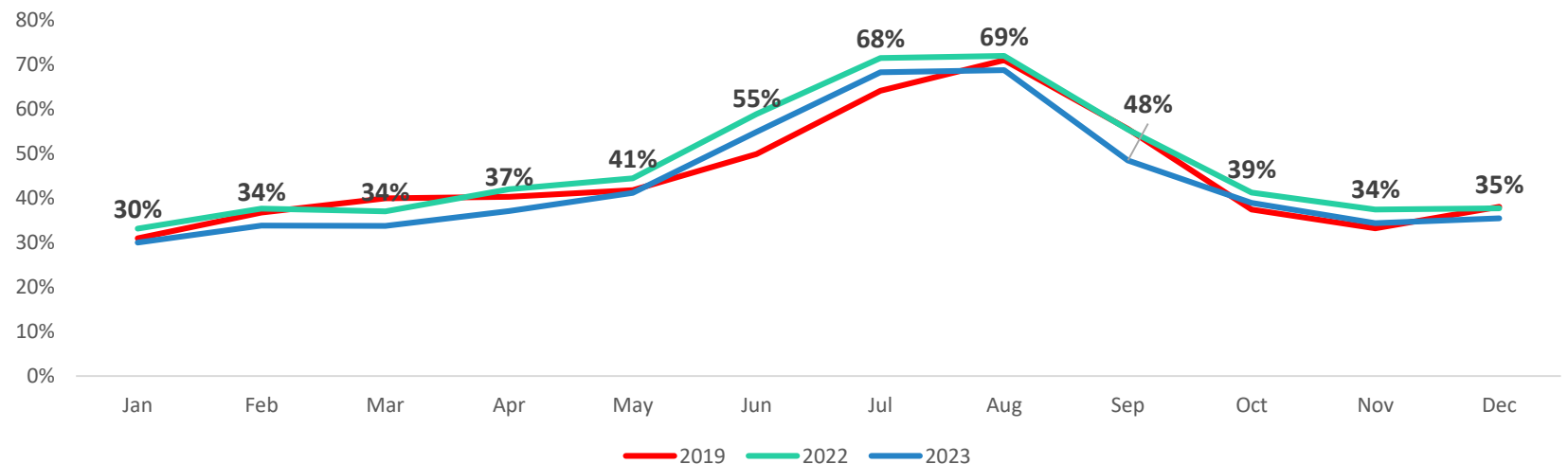
ACCOMMODATIONS SECTOR

SHORT TERM RENTAL ACTIVITY (YTD DECEMBER)

NL Short-term Rental Listings (Airbnb, Vrbo) – Nights Booked 2019 to 2023



NL Short-term Rental Listings (Airbnb, Vrbo) – Occupancy Rate 2019 to 2023



Background Tourism Performance 2019 – 2023

- The number of non-resident air, automobile and cruise visitors travelling to the province reached an estimated 487,000 in 2023, an increase of 13% compared to 2022, but 8% below 2019 levels. Preliminary in-province expenditures by non-residents are estimated at \$551.6 million, an increase of 12% compared to 2022 and on par with 2019 levels.
- The preliminary number of non-resident air visitors travelling to the province reached an estimated 304,300 in 2023, an increase of 10% compared to 2022, but 21% below 2019 levels. Preliminary in-province expenditures by non-resident air visitors are estimated at \$396.5 million, an increase of 14% compared to 2022 and down 10% from 2019.
- Non-resident automobile visitation to the province reached an estimated 113,600 visitors in 2023, an increase of 3% compared to 2022 and 21% above 2019 visit levels. Preliminary in-province expenditures by non-resident auto visitors are estimated at \$147.7 million, increasing 6% compared to 2022 and 38% above 2019 levels.
- In 2023, unique cruise ship visitors are estimated to have reached 69,100, an increase of 55% over 2022 and 32% higher than in 2019. Spending by cruise visitors is estimated at \$7.4 million, an increase of 59% from 2022 and 51% above 2019 levels.

*2023 estimates are preliminary and subject to change once final 2023 Visitor exit survey results are available

2019 – 2023 Non-resident Visitors by Mode of Transportation

Non-resident Visitors	2019	2022	2023*	Year-over-Year Change 2023 / 2022	Year-over-Year Change 2023 / 2019
Non-resident visitors – air	384,300	276,300	304,300	10%	-21%
Non-resident visitors – auto	93,800	110,600	113,600	3%	21%
Sub-total (air & auto)	478,100	386,900	417,900	8%	-13%
Non-resident visitors – cruise	52,400	44,500	69,100	55%	32%
Grand Total	530,500	431,400	487,000	13%	-8%

2019 – 2023 Non-resident In-Province Expenditures by Mode of Transportation (\$ million)

In-Province Expenditures	2019	2022	2023*	Year-over-Year Change 2023 / 2022	Year-over-Year Change 2023 / 2019
Non-resident expenditures – air	\$438.6	\$348.4	\$396.5	14%	-10%
Non-resident expenditures – auto	\$106.8	\$139.2	\$147.7	6%	38%
Sub-total (air & auto)	\$545.4	\$487.6	\$544.1	12%	0%
Non-resident expenditures – cruise	\$4.9	\$4.6	\$7.4	59%	51%
Grand Total	\$550.3	\$492.2	\$551.6	12%	0%

About These Statistics

The Tourism Research Division, Department of Tourism, Culture, Arts and Recreation 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 department staff who 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 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 include 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 registered operators). This can be accessed at <https://www.gov.nl.ca/tcar/tourism-division/visitor-and-market-insights/>

2023 Department of Tourism, Culture, Arts & Recreation Flash Sheet - Key Tourism Indicators Year-to-Date (YTD)

Indicator	YTD	YTD Change vs 2022	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Number of Marine Atlantic Crossings (Both Directions) ¹	1,743	-1%	105	94	108	117	150	183	205	208	182	148	140	103
Passenger Traffic on Marine Atlantic (Both Directions) ²	368,039	4%	10,404	8,060	12,655	17,177	24,227	40,924	77,132	79,528	42,483	27,161	15,099	13,189
Non-Residents Exiting (auto) ³	113,598	3%	2,760	1,886	3,217	3,564	5,074	10,633	23,817	30,950	16,242	8,776	3,726	2,953
Residents Exiting (auto) ⁴	64,565	8%	2,604	1876	2,943	4,330	5,269	7,183	11,132	11,737	5,837	5,211	3,490	2,953
Vehicle Traffic on Marine Atlantic (Both Directions) ⁵	145,349	3%	3,753	2,651	4,341	6,665	9,959	16,848	29,611	31,101	18,502	11,276	5,664	4,978
Airport Passenger Movements ⁶	1,837,629	16%	105,943	101,672	129,473	135,424	157,564	181,741	222,978	224,160	173,457	158,666	125,833	120,718
Non-Resident Exiting (air) ⁷	304,300	10%	11,596	9,988	11,614	13,557	21,127	33,809	49,335	62,550	36,438	25,274	15,705	14,249
Roofed Accommodation Occupancy Rates ⁸	58.0%	7.3 pts	38.3%	47.4%	53.2%	53.8%	56.1%	68.4%	75.7%	76.7%	64.7%	55.0%	52.2%	39.0
Roofed Accommodation Room Nights Sold ⁹	1,685,946	15%	85,735	96,293	121,935	121,986	150,418	190,277	219,609	213,831	163,033	130,925	111,272	80,632
Short-Term Rentals Occupancy Rates ¹⁰	48.4%	-3.9 pts	30.0%	33.8%	33.7%	37.1%	41.2%	54.8%	68.3%	68.8%	48.5%	38.9%	34.4%	35.5%
Short-Term Rentals Booked Nights ¹¹	318,049	9%	8,933	9,229	11,809	14,507	24,360	41,641	59,178	60,268	37,045	22,623	14,327	14,129
Provincial Museums ¹²	136,808	n/a	5,689	5,309	8,981	8,724	11,258	15,712	17,110	22,137	15,205	9,879	7,938	8,866
Provincial Historic Sites ¹³	90,586	-25%					3,159	17,656	24,955	26,370	14,314	2,256	1,876	
National Historic Sites ¹⁴	114,246	10%					n/a	n/a	n/a	n/a	n/a	n/a		
Visitor Information Centres	116,387	13%					9,232	22,639	30,834	28,640	17,692	7,350		

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, Wabush, Goose Bay); Wabush passenger data unavailable since April 2023.

7. Non-resident air visits: Estimates are based on results of the 2016 Provincial Exit Survey Program and 2023 airport boarding passenger volumes; excludes non-resident visitation from Wabush.

8, 9. Roofed accommodation occupancy and room nights sold: Data is current as of July 2023 and is subject to revisions pending further reporting by the province's registered operators.

10., 11. Short-term rental occupancy and booked nights: Source: AirDNA, includes listings on Airbnb and Vrbo with at least one night available for booking during the period

12. Provincial Museums (data as available): The Rooms – January to December; Demasduit Regional Museum, Seamen's Museum and Labrador Interpretation Centre – May to October 2023. Regional museum stats not available for May; Monthly totals may not add to grand YTD total as some museums report season total without monthly breakdown.

13. Provincial Historic Sites operating season May to October/November.

14. National Historic Sites: operating season to October, as available.

15. Visitors to the Provincial VICs cover the period May to October 2023; airport VICs remain open year-round.

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