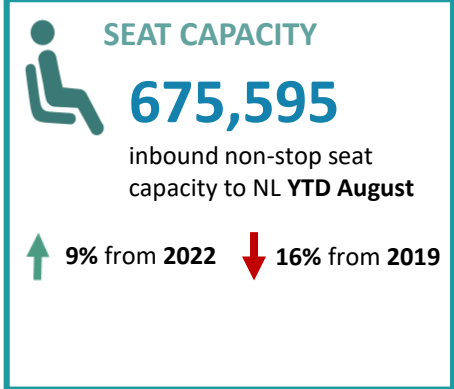
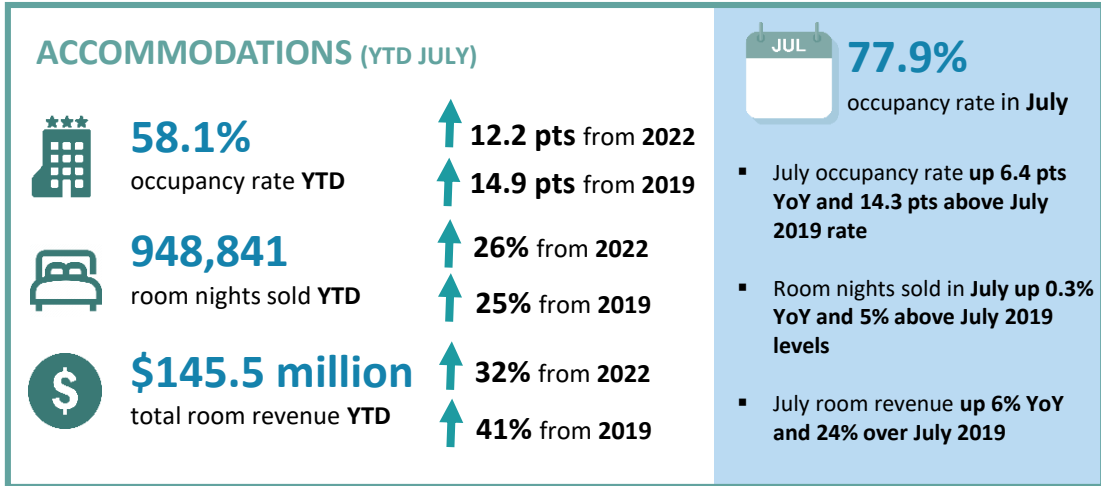
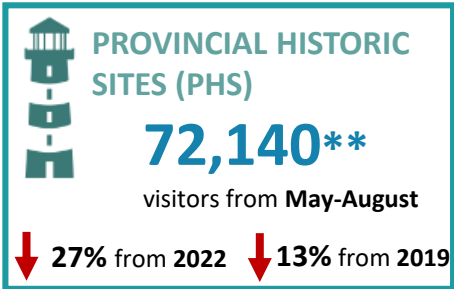
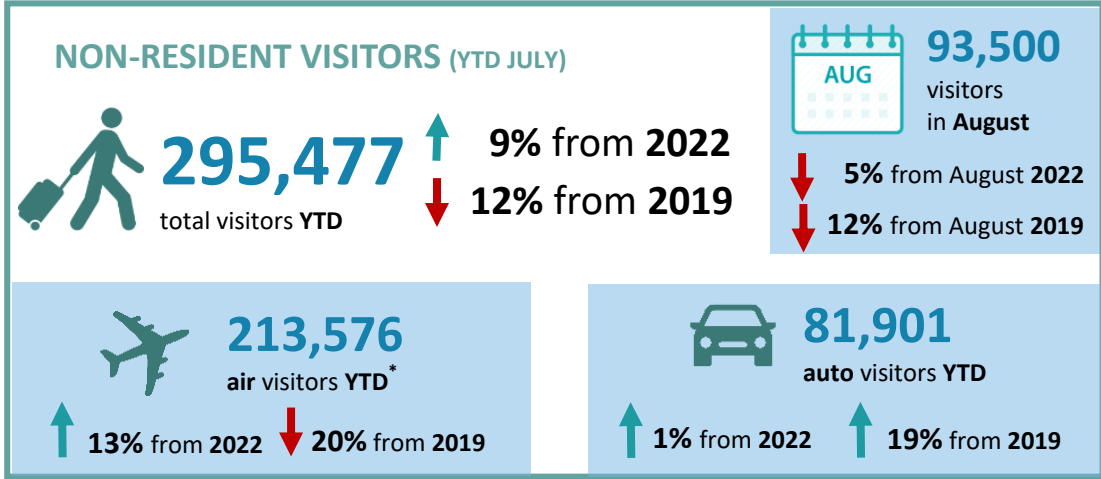


### YTD AUGUST HIGHLIGHTS

- The number of non-resident air and auto visitors to NL reached an estimated 295,477 from January to August, a 9% increase compared to the same period in 2022. While auto visits have recovered to surpass 2019 levels (+19%), air visitation (-20%) continues to recover more slowly, leaving **overall year-to-date non-resident visitation** 12% below pre-pandemic 2019 levels. While year-to-date performance continues to be above 2022 levels, several indicators for the month of August suggest growth has slowed.
- Auto visitation has been strong over the first eight months of 2023, but year-over-year growth is weakening. Auto visitation increased 1% compared to the same period in 2022 and sits 19% above 2019 levels. Marine Atlantic passenger movements and passenger-related vehicle movements have also surpassed 2019 levels over this period. Despite posting steady growth compared to 2022 (+13%), visits by air have lag recovery, reaching 80% of 2019 levels for the January to August 2023 period.
- The registered accommodations sector continued its strong performance, with the occupancy rate (+12.2 pts), room nights sold (+26%) and total room revenue (+32%) all up for the January to July period compared to the same period in 2022. Year-to-date room night sales are 25% above of 2019 levels, while total room revenue is 41% higher than during this period in 2019. The occupancy rate from January to July is 14.9 points above where it stood during the same period in 2019 while the average daily rate is 12% higher.
- 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.**

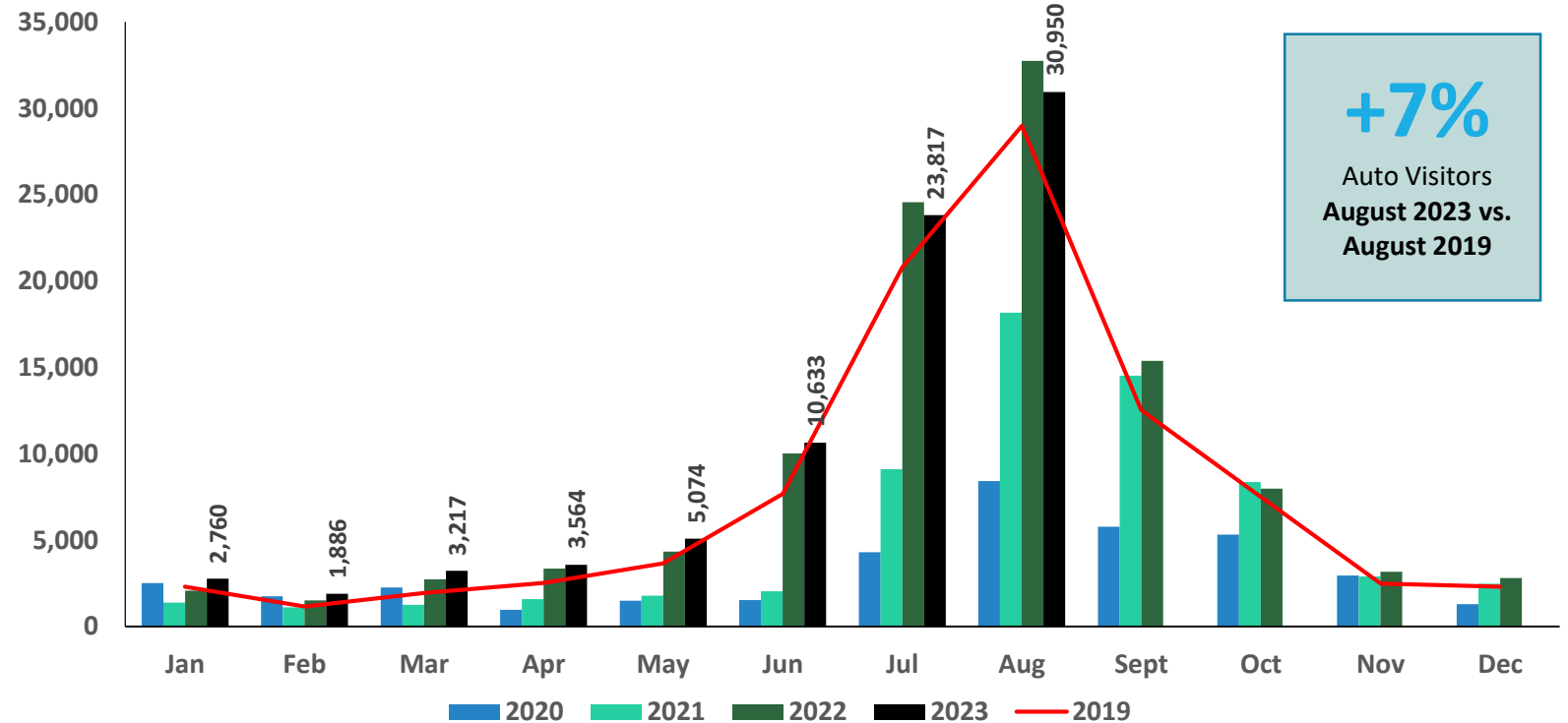


**Notes:**  
 \*Passenger movements at the province's 7 major airports (St. John's, Gander, Deer Lake, Stephenville, St. Anthony, Wabush & Goose Bay). Non-resident air visitor count excludes Wabush due to unavailable data. Passenger movements for Wabush unavailable for April-August 2023.  
 \*\*Commissariat House closed to the public in May & June 2023; first full season for Colonial Building operating as a PHS. PHS admission was free in 2022 for *Come Home 2022* celebrations, resulting in high levels of visitation and impacting YOY comparison with 2023.

- Ferry Passenger Movements:** Marine Atlantic passenger movements (both directions) reached 270,107 YTD August 2023, an increase of 3% compared to the same period in 2022 (262,230) and up 18% from 2019 (229,510).
- Passenger-related vehicle (PRV) movements** increased 3% during the same period, from 102,106 to 104,929. PRV movements YTD August were up 22% from pre-pandemic 2019 levels. The number of **crossings** decreased slightly from 1,192 to 1,170, down 2% from the same period in 2022 but up 7% from 2019.
- Passenger movements for the month of **August 2023** (79,528) were up 1% over August 2022 (78,611), but 10% above August 2019 levels (72,429). The number of PRV movements in August 2023 (31,101) increased 1% compared to August 2022 (30,864) but remained 11% higher than in August 2019 (27,912).
- Auto Visitors:** The number of non-resident automobile visitors to the province is estimated to have reached 81,901 year-to-date August 2023, an increase of 1% over the same period in 2022 and 19% higher than during the same period in 2019. For the month of August 2023, auto visitation was 6% below August 2022 levels but remained 7% above August 2019 levels.

## MARINE ATLANTIC PASSENGER MOVEMENTS & AUTO VISITATION

Newfoundland and Labrador Non-resident Auto Visitors 2019 to 2023



**+7%**  
Auto Visitors  
August 2023 vs.  
August 2019

**270,107**  
total passenger movements  
(both directions) YTD  
↑ 3% from 2022    ↑ 18% from 2019

**104,929**  
passenger-related vehicle  
movements YTD  
↑ 3% from 2022    ↑ 22% from 2019

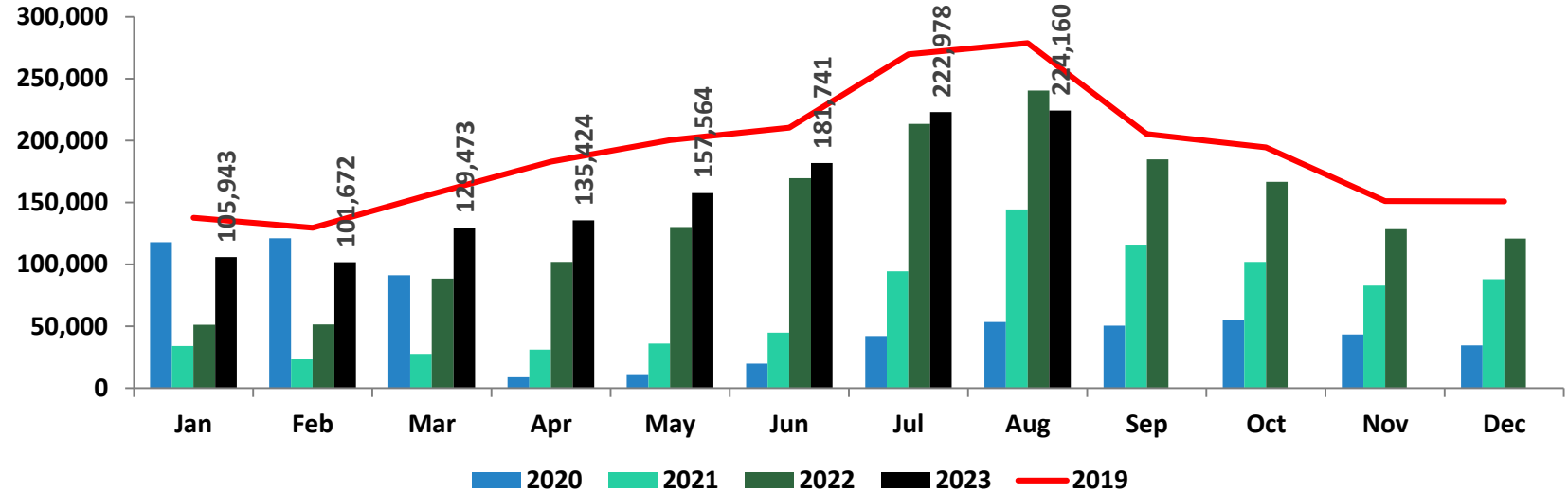
**1,170**  
total ferry crossings  
YTD  
↓ 2% from 2022    ↑ 7% from 2019

- Air Passenger Movements:** Airport activity (boarding and deplaning passenger movements) for St. John’s, Gander, Deer Lake, St. Anthony, Goose Bay and Wabush\* reached 1,258,955 passenger movements from January to August 2023, an increase of 22% compared to the same period in 2022, recovering to 84% of 2019 levels. Passenger movements for the month of August 2023, however, were down 1% from August 2022 and 16% below August 2019 levels.
- Air Visitors:** The number of non-resident air visitors to the province reached an estimated 213,576 year-to-date, up 13% from the same period in 2022 and recovered to 80% of 2019 levels. For the month of August 2023, however, non-resident air visitation was 3% below August of last year, and 19% below August 2019 levels.
- Note: Non-resident air visitor estimates are preliminary only and subject to change pending the completion of the 2023 Provincial Visitor Exit Survey**
- 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. August 2023 marks the second month with seat capacity decreasing YoY (-5% compared to July 2022; -12% to Aug 2022)
- The January to August 2023 period saw an increase of 9% in inbound seats compared to the same period in 2022 (675,595 seats versus 618,874 seats in 2022) but remains 16% below 2019 levels (802,659 seats). In 2023, capacity continues to build, however, monthly year-over-year increases are slowing, with July and August remaining below respective 2022 levels. Seat capacity in August (122,197) was down 12% over August 2022 and 16% below August 2019 levels.

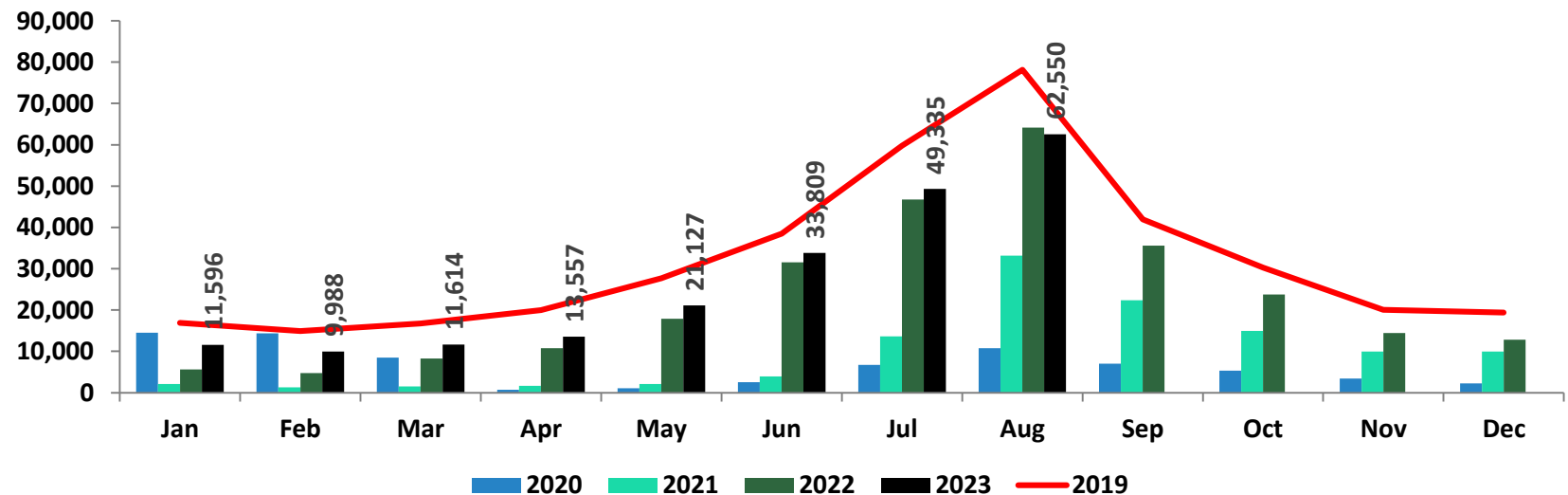
\*Wabush data missing for April-August 2023

## AIR PASSENGER MOVEMENTS & VISITATION

Newfoundland and Labrador Airport Passenger Movements 2019 to 2023



Newfoundland and Labrador Non-resident Air Visitors 2019 to 2023

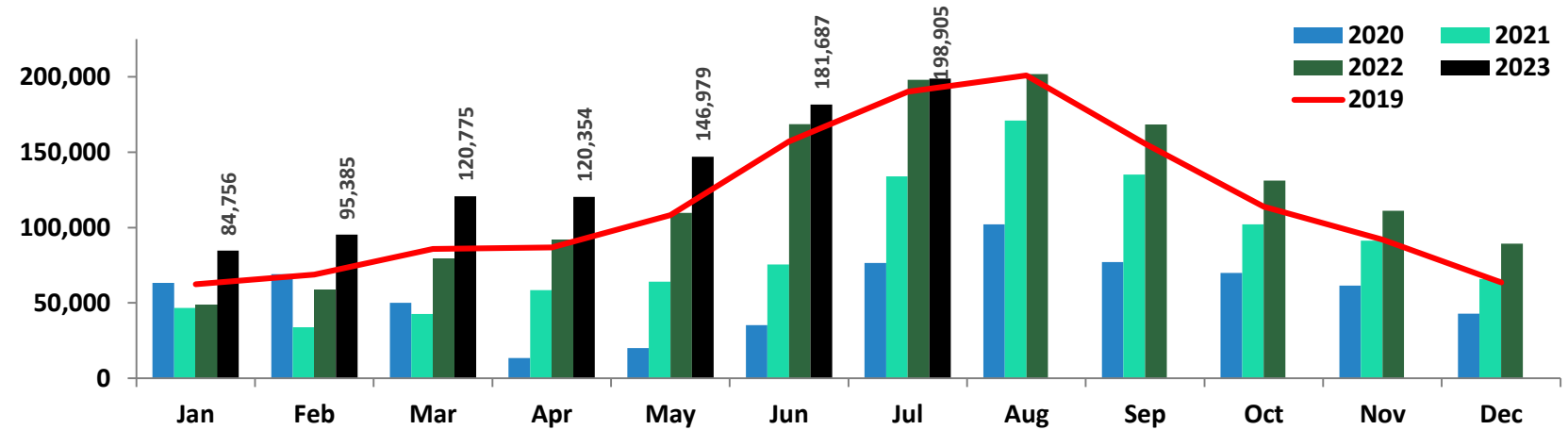


- Room Nights Sold:** From January to July 2023, registered accommodations in the province reported 948,841 room nights sold, an increase of 26% from the same period in 2022. Year-to-date room night sales surpassed 2019 levels by 25%.
- Occupancy:** Accommodation occupancy reached 58.1% for the period from January to July 2023, an increase of 12.2 points compared to the same period in 2022 (45.9%). The occupancy rate YTD July 2023 was also 14.9 points above the pre-pandemic 2019 rate for the same period.
- Room Revenue:** Total room revenue reached \$145.5 million from January to July 2023, up from \$110.5 million for same period in 2022, an increase of 32%. YTD room revenue has surpassed pre-pandemic 2019 levels by a substantial 41%.
- Year-Over-Year (YOY) Growth:** For the month of July 2023, room nights sold (198,905) were on par with July 2022 (198,260; +0.3%). Room night sales in July 2023 were 5% above July 2019 levels. Total room revenue for the month of July 2023 was \$35.1 million, up from \$33.2 million in July 2022, representing an increase of 6%. Room revenue for the month of July 2023 was 24% higher than that recorded in July 2019. July occupancy reached 77.9%, an increase of 6.4 points over July 2022 and 14.3 points higher than in July 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.

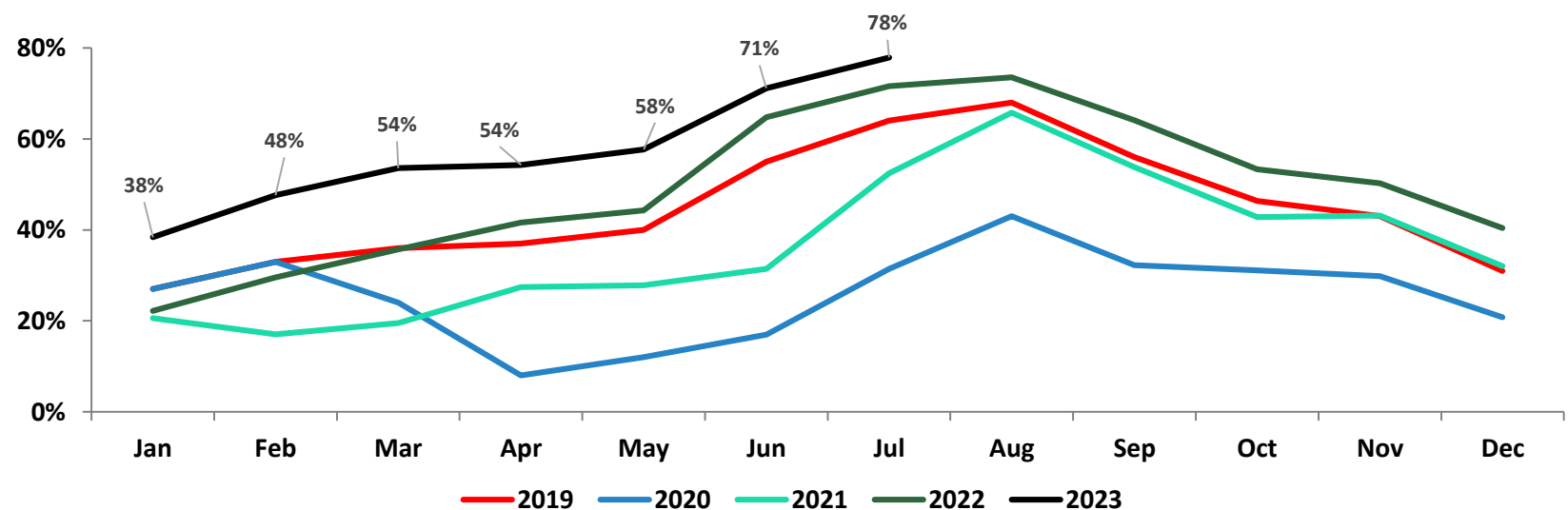
## ACCOMMODATIONS SECTOR

### REGISTERED ACCOMMODATIONS

NL Registered Accommodation Room Nights Sold 2019 to 2023



NL Registered Accommodation Occupancy Rate 2019 to 2023

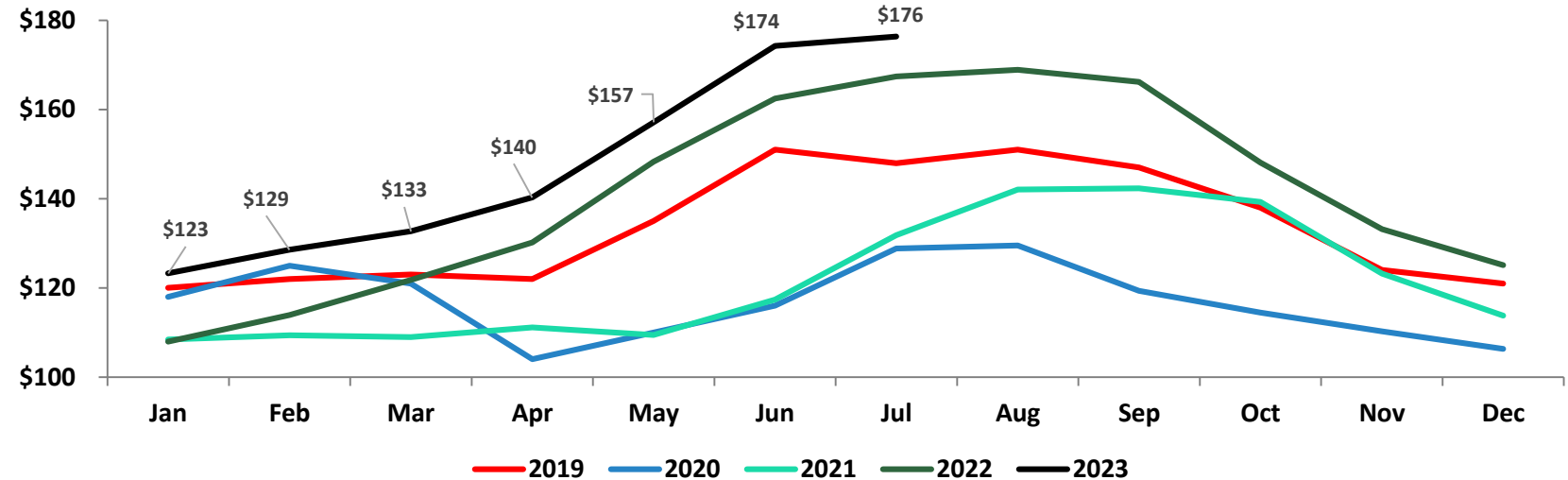


- **Average Daily Rate (ADR):** The ADR reached \$153 for the period January to July, up 5% from the same period in 2022 (\$146), and up 12% from where it stood in 2019 (\$136).
- The ADR for the month of July reached \$176, up 5% from July 2022 (\$168) and 19% above the July 2019 rate (\$148).
- **Note:** all accommodations data are preliminary and subject to change pending further reporting by operators.

## ACCOMMODATIONS SECTOR

### REGISTERED ACCOMMODATIONS

NL Registered Accommodation Average Daily Rate 2019 to 2023



**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.

### SHORT-TERM RENTAL ACTIVITY (YTD AUGUST)

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

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	1560	1493	1533	1789	2362	2788	3031	3087	2914	2498	2055	1970
2023	1977	1862	1963	2218	2790	3212	3459	3535				

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	\$176	\$195	\$188	\$181	\$184	\$193	\$205	\$207	\$200	\$190	\$195	\$193
2023	\$195	\$212	\$214	\$200	\$205	\$207	\$216	\$217				

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

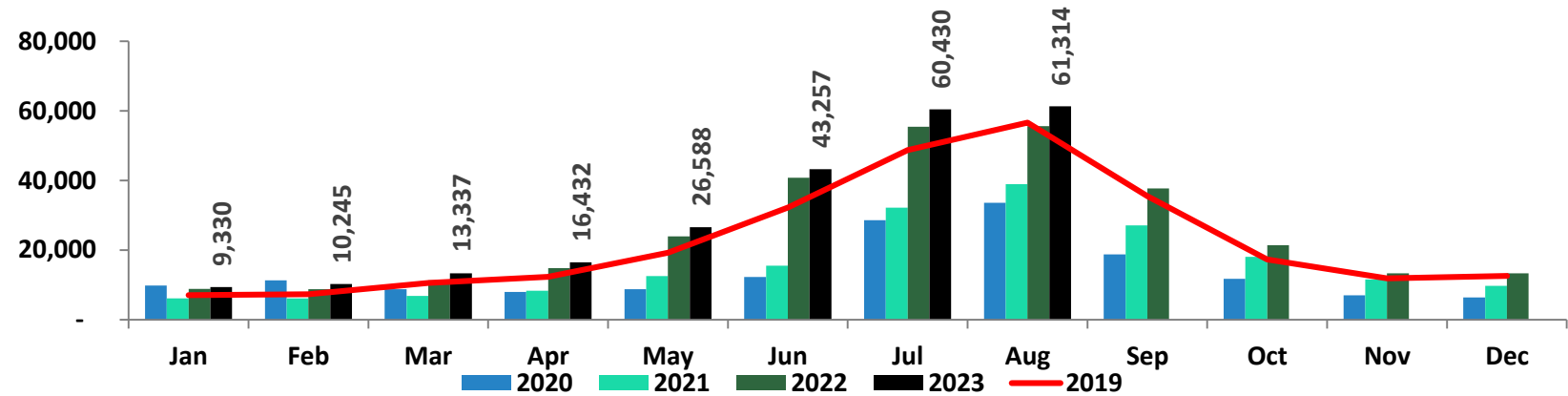
- Short-term Rental Listings:** According to AirDNA reporting, there were 3,535 listings in the province on the Airbnb and Vrbo short-term rental platforms in August 2023. This compares to 3,087 listings in August 2022 (+15%). Of these, 3,399 listings (96% of total listings) had at least one reservation during the month of August 2023. This compares to 2,999 booked listings (97%) in August 2022.
- Nights Available:** For the period January to August 2023, short-term rental properties in the province listed on Airbnb and Vrbo reported 442,929 **nights available** for bookings/reservations compared to 384,354 nights available for the same period in 2022 (+15%). Nights available for the month of August (87,547) were 15% higher than in August 2022 (76,423).
- Nights Booked:** From January to August 2023, short-term rental properties in the province reported 240,933 **room nights booked**, an increase of 10% compared to the same period in 2022 (219,478). Room nights booked in August 2023 (61,314) were 10% higher than in August 2022 (55,604).
- Occupancy:** The occupancy rate for short-term rental properties in the province reached 54.5% for the period January to August 2023, a decrease of 2.6 points compared to the same period in 2022. The **average daily rate\*** reached \$211 for the period January to August 2023, an increase of 7% compared to the same period in 2022 (\$197).

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

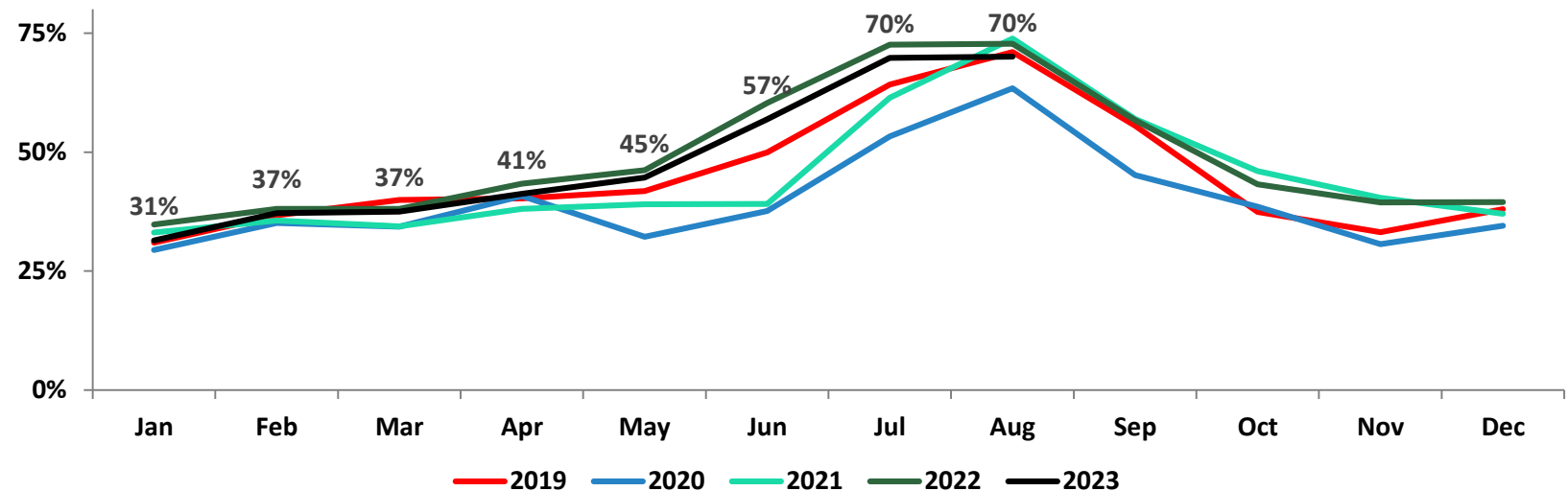
## ACCOMMODATIONS SECTOR

### SHORT TERM RENTAL ACTIVITY (YTD AUGUST)

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 – 2022**

- The number of non-resident air, automobile and cruise visitors travelling to the province reached an estimated 431,400 in 2022, an increase of 138% compared to 2021, but 19% below 2019 levels. In-province expenditures by non-residents are estimated at \$492.2 million, an increase of 129% compared to 2021 and 11% below 2019 levels.
- The number of non-resident air visitors travelling to the province reached an estimated 276,300 in 2022, an increase of 137% compared to 2021, but 28% below 2019 levels. In-province expenditures by non-resident air visitors are estimated at \$348.4 million, an increase of 152% compared to 2021 and down 21% from 2019.
- Non-resident automobile visitation to the province reached an estimated 110,600 visitors in 2022, an increase of 71% compared to 2021 and 18% above 2019 visit levels. In-province expenditures by non-resident auto visitors are preliminarily estimated at \$139.2 million, increasing 82% compared to 2021 and 30% above 2019 levels.
- In 2022, unique cruise ship visitors are estimated to have reached 44,500, a decrease of 15% over 2019, with spending by cruise visitors estimated at \$4.6 million, a decrease of 5% over 2019

**2019 – 2022 Non-resident Visitors by Mode of Transportation**

Non-resident Visitors	2019	2020	2021	2022	Year-over-Year Change 2022 / 2021	Year-over-Year Change 2022 / 2019
Non-resident visitors – air	384,300	77,000	116,600	276,300	137%	-28%
Non-resident visitors – auto	93,800	38,600	64,700	110,600	71%	18%
<b>Sub-total (air &amp; auto)</b>	<b>478,100</b>	<b>115,600</b>	<b>181,300</b>	<b>386,900</b>	<b>113%</b>	<b>-19%</b>
Non-resident visitors – cruise	52,400	0	0	44,500	-	-15%
<b>Grand Total</b>	<b>530,500</b>	<b>115,600</b>	<b>181,300</b>	<b>431,400</b>	<b>138%</b>	<b>-19%</b>

**2019 – 2022 Non-resident In-Province Expenditures by Mode of Transportation (\$ million)**

In-Province Expenditures	2019	2020	2021	2022	Year-over-Year Change 2022 / 2021	Year-over-Year Change 2022 / 2019
Non-resident expenditures – air	\$438.6	\$88.1	\$138.3	\$348.4	152%	-21%
Non-resident expenditures – auto	\$106.8	\$44.0	\$76.5	\$139.2	82%	30%
<b>Sub-total (air &amp; auto)</b>	<b>\$545.4</b>	<b>\$132.1</b>	<b>\$214.8</b>	<b>\$487.6</b>	<b>127%</b>	<b>-11%</b>
Non-resident expenditures – cruise	\$4.9	\$0	\$0	\$4.6	-	-5%
<b>Grand Total</b>	<b>\$550.3</b>	<b>\$132.1</b>	<b>\$214.8</b>	<b>\$492.2</b>	<b>129%</b>	<b>-11%</b>

**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) <sup>1</sup>	1,170	-2%	105	94	108	117	150	183	205	208				
Passenger Traffic on Marine Atlantic (Both Directions) <sup>2</sup>	270,107	3%	10,404	8,060	12,655	17,177	24,227	40,924	77,132	79,528				
Non-Residents Exiting (auto) <sup>3</sup>	81,901	1%	2,760	1,886	3,217	3,564	5,074	10,633	23,817	30,950				
Residents Exiting (auto) <sup>4</sup>	47,074	11%	2,604	1876	2,943	4,330	5,269	7,183	11,132	11,737				
Vehicle Traffic on Marine Atlantic (Both Directions) <sup>5</sup>	104,929	3%	3,753	2,651	4,341	6,665	9,959	16,848	29,611	31,101				
Airport Passenger Movements <sup>6</sup>	1,258,955	22%	105,943	101,672	129,473	135,424	157,564	181,741	222,978	224,160				
Non-Resident Exiting (air) <sup>7</sup>	213,576	13%	11,596	9,988	11,614	13,557	21,127	33,809	49,335	62,550				
Roofed Accommodation Occupancy Rates <sup>8</sup>	58.1%	12.2	38.4%	47.6%	53.6%	54.3%	57.7%	71.1%	77.9%					
Roofed Accommodation Room Nights Sold <sup>9</sup>	948,841	26%	84,756	95,385	120,775	120,354	146,979	181,687	198,905					
Short-Term Rentals Occupancy Rates <sup>10</sup>	54.5%	-2.6 pts	31.5%	37.2%	37.5%	41.2%	44.7%	56.9%	69.8%	70.0%				
Short-Term Rentals Booked Nights <sup>11</sup>	240,933	10%	9,330	10,245	13,337	16,432	26,588	43,257	60,430	61,314				
Provincial Museums <sup>12</sup>	94,920	n/a	5,689	5,309	8,981	8,724	11,258	15,712	17,110	22,137				
Provincial Historic Sites <sup>13</sup>	72,140	-27%					3,159	17,656	24,955	26,370				
National Historic Sites <sup>14</sup>	n/a	n/a					n/a	n/a	n/a	n/a				
Visitor Information Centres	91,486	13%					9,232	22,639	30,975	28,640				

Notes:

- The number of crossings between Newfoundland and Nov Scotia by Marine Atlantic (both directions)
- Passengers carried (both directions) by Marine Atlantic
- Non-resident auto visits
- 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.
- Passenger-related traffic carried (both directions) by Marine Atlantic
- 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 for April-August 2023.
- 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.
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.
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