

2022 HIGHLIGHTS

- Provincial tourism performance continued its recovery throughout 2022 across a range of indicators. The number of non-resident air and auto visitors to NL reached 386,900 in 2022, up 137% compared to the same period in 2021.
- Following a two-year absence, cruise visitation returned in 2022, with approximately 44,500 cruise passengers visiting ports across the province. Including cruise, overall non-resident visitation reached 431,400 in 2022, an increase of 138% from 2021. While auto visits recovered to surpass 2019 levels (+18%), air (-28%) and cruise (-15%) visitation have been slower to recover, leaving **overall 2022 non-resident visitation** 19% below pre-pandemic 2019 levels.
- The licenced accommodations sector posted a strong recovery in 2022, with the occupancy rate (+14.1pts), room nights sold (+36%) and total room revenue (+60%) all up for the January to November period compared to the same period in 2021. Room nights sold have recovered to surpass 2019 levels (+1%), while total room revenue was 10% higher than during the same period in 2019. The occupancy rate from January to November was 4.4 points above where it stood during the same period in 2019 while the average daily rate was 9% higher.

2022 NON-RESIDENT VISITORS (AIR, AUTO, CRUISE)



431,400**
total visitors in 2022

↑ 138% from 2021

↓ 19% from 2019



276,300
air visitors in 2022**

↑ 137% from 2021
↓ 28% from 2019



110,600
auto visitors in 2022

↑ 71% from 2021
↑ 18% from 2019



44,500
cruise visitors in 2022

n/a from 2021
↓ 15% from 2019

ACCOMMODATIONS (YTD NOVEMBER)



51.7%
occupancy rate YTD

↑ 14.1 pts from 2021

↑ 4.4 pts from 2019



1,340,811
room nights sold YTD

↑ 36% from 2021

↑ 1% from 2019



\$202.8 million
total room revenue YTD

↑ 60% from 2021

↑ 10% from 2019



51.7%
occupancy rate
November 2022

- November occupancy rate **up 8.9 pts YOY and 8.8 pts above November 2019 rate**
- Room nights sold in November **up 8% YOY and 13% above November 2019 levels**
- November room revenue **up 17% YOY and 21% over November 2019**

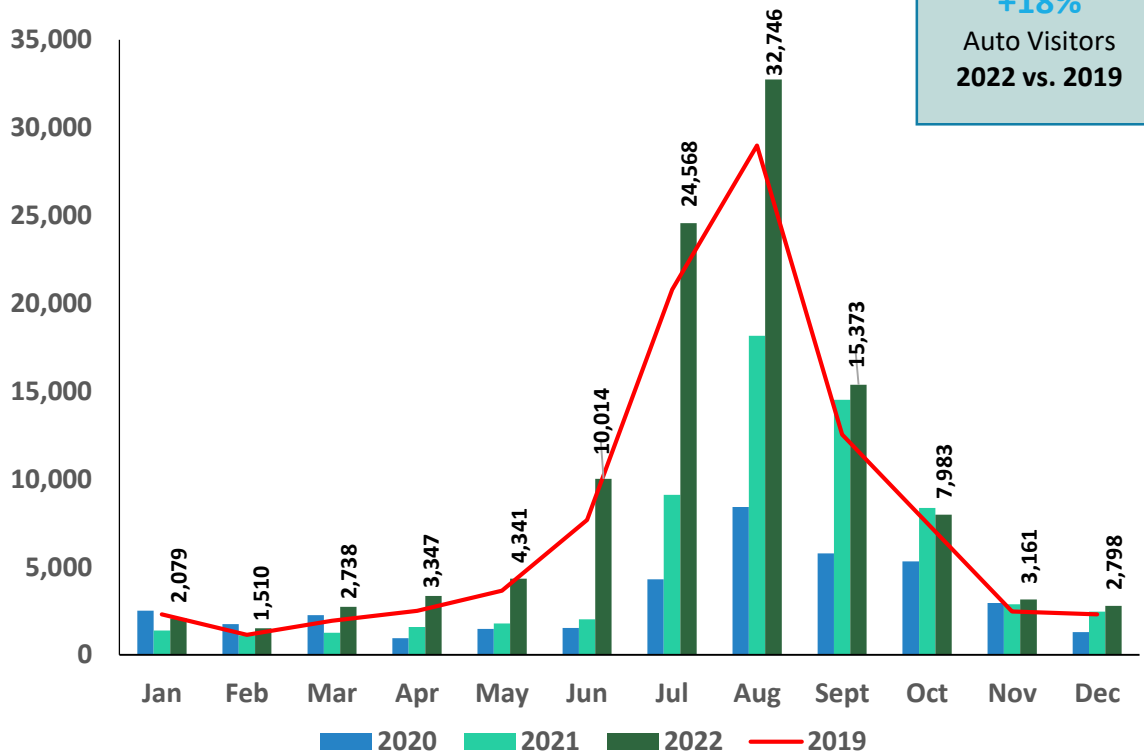
*Reporting periods vary depending on available data;

** Non-resident air visitor estimates unavailable from Wabush airport.

- Ferry Passenger Movements:** Marine Atlantic passenger movements (both directions) reached 354,461 in 2022, an increase of 60% compared to the same period in 2021 (221,596) and up 14% from 2019 (309,909).
- Passenger-related vehicle (PRV) movements** increased 62% during the same period, from 86,748 to 140,449. PRV movements were up 18% from pre-pandemic 2019 levels. The number of **crossings** increased from 1,640 to 1,753, up 7% from the same period in 2021 and 9% from 2019.
- Passenger movements for the month of **December 2022** (13,398) were up 14% over December 2021 (11,707), and 14% above December 2019 levels (11,804). The number of PRV movements in December 2022 (5,326) increased 13% compared to December 2021 (4,732) and 20% compared to December 2019 (4,438).
- Auto Visitors:** The number of non-resident automobile visitors to the province is estimated to have reached 110,600 in 2022, an increase of 71% over the same period in 2021 and 18% higher than during the same period in 2019. For the month of December 2022, auto visitation was 13% above December 2021 levels and 21% above December 2019 levels.

MARINE ATLANTIC PASSENGER MOVEMENTS & AUTO VISITATION

Newfoundland and Labrador Non-resident Auto Visitors 2019 to 2022



+18%
Auto Visitors
2022 vs. 2019

354,461
total passenger movements (both directions) in 2022

↑ 60% from 2021 ↑ 14% from 2019

140,449
passenger-related vehicle movements in 2022

↑ 62% from 2021 ↑ 18% from 2019

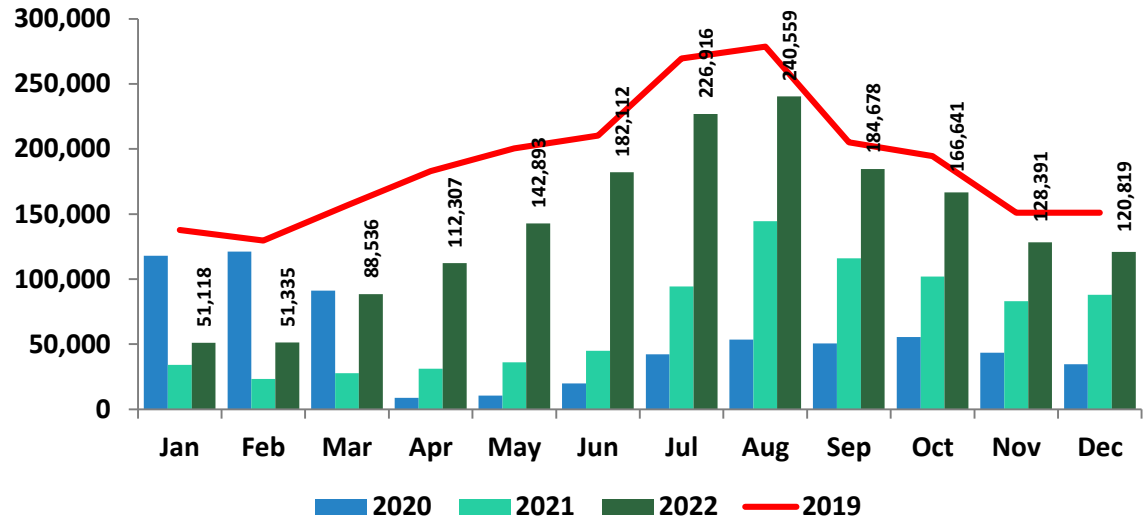
1,753
total ferry crossings in 2022

↑ 7% from 2021 ↑ 9% from 2019

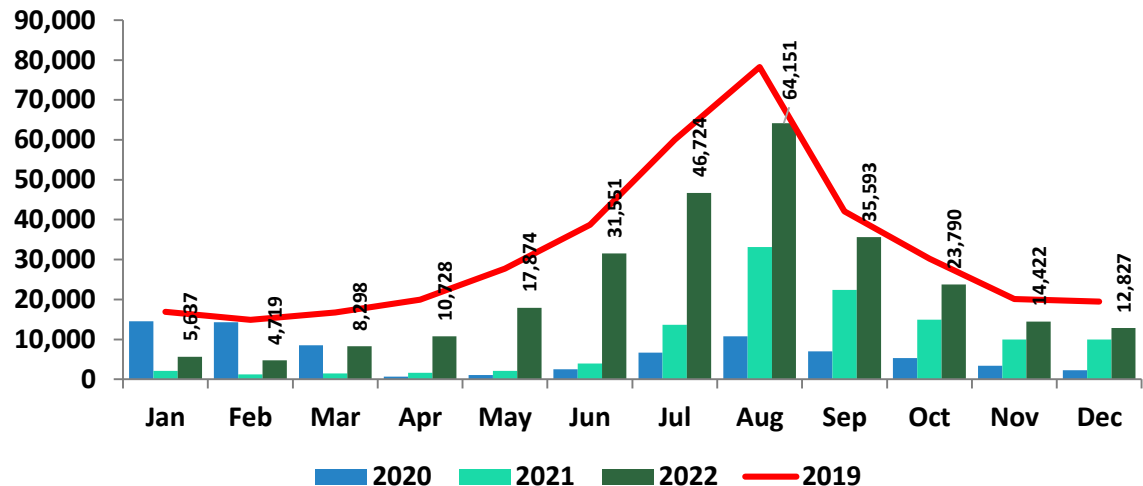
- Air Passenger Movements:** Airport activity (boarding and deplaning passenger movements) for St. John's, Gander, Deer Lake, St. Anthony, Goose Bay and Wabush reached 1.7 million passenger movements in 2022, an increase of 96% compared to 2021 and recovered to 75% of 2019 levels. Passenger movements for the month of December 2022 were up 24% over December 2021 and reached 80% of December 2019 levels.
- Air Visitors:** The number of non-resident air visitors to the province reached an estimated 276,300 in 2022, up 137% from 2021 and recovered to 72% of 2019 levels. For the month of December 2022, non-resident air visitors increased 29% compared to December of 2021, and reached 66% of December 2019 levels.
- Seat Capacity:** With travel restrictions easing since the second half of 2021, 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 these improvements, with monthly capacity increasing every month compared to the same month in the previous year for the May 2021 to November 2022 period. The January to December 2022 period saw an increase of 103% in inbound seats compared to the same period in 2021 (937,245 seats versus 462,737 seats in 2021) but remains 19% below 2019 levels (1,161,723 seats).
- As capacity continues to build, the monthly number of inbound seats has been approaching pre-pandemic levels for most of 2022 compared to 2019, however, monthly capacity declined in November and December 2022, staying 23% and 22% respectively below 2019 levels.

AIR PASSENGER MOVEMENTS & VISITATION

Newfoundland and Labrador Airport Passenger Movements 2019 to 2022



Newfoundland and Labrador Non-resident Air Visitors 2019 to 2022

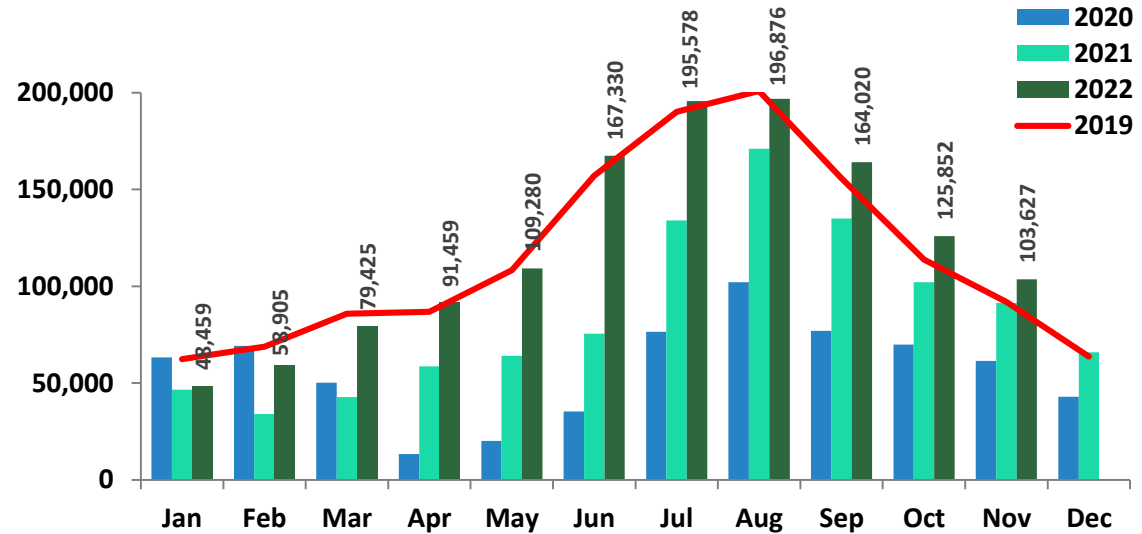


- Room Nights Sold:** From January to November 2022, licenced accommodations in the province reported 1,340,811 room nights sold, an increase of 36% from the same period in 2021. Room night sales in 2022 have recovered to surpass 2019 levels (+1%).
- Occupancy:** Accommodation occupancy reached 51.7% for the period from January to November 2022, an increase of 14.1 points compared to the same period in 2021 (37.6%). The occupancy rate YTD November 2022 was 4.4 points above the pre-pandemic 2019 rate for the same period.
- Room Revenue:** Total room revenue reached \$202.8 million from January to November 2022, up from \$126.6 million for same period in 2021, an increase of 60%. YTD room revenue has recovered to surpass pre-pandemic 2019 levels (+10%).
- Year-Over-Year (YOY) Growth:** For the month of November 2022, room nights sold increased 8% over November 2021, from 95,840 to 103,627. Room night sales in November 2022 were 13% above November 2019 levels. Total room revenue for the month of November 2022 was \$13.8 million, up from \$11.8 million in November 2021, representing an increase of 17%. Room revenues for the month of November 2022 were 21% higher than those recorded in November 2019. November occupancy reached 51.7%, an increase of 8.9 points over November 2021 and 8.8 points higher than in November 2019.

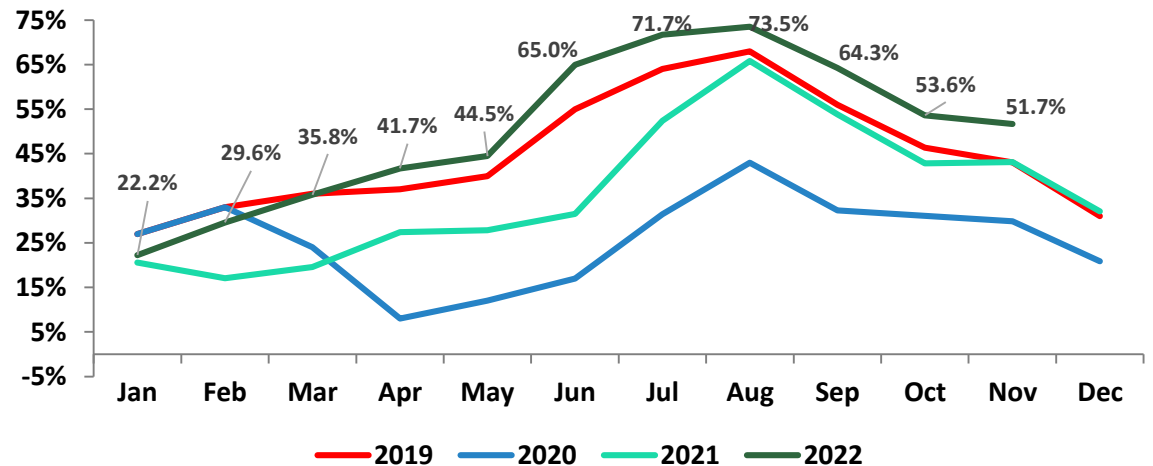
ACCOMMODATIONS SECTOR

LICENCED ACCOMMODATIONS

NL Licenced Accommodation Room Nights Sold 2019 to 2022



NL Licenced Accommodation Occupancy Rate 2019 to 2022



- **Average Daily Rate (ADR):** The ADR reached \$151 for the period January to November, up 18% from the same period in 2021 (\$128), and up 9% from where it stood in 2019 (\$139).
- The ADR for the month of November reached \$133, up 8% from November 2021 (\$123) and 7% above the November 2019 rate (\$124).
- **Note:** all accommodations data are preliminary and subject to change pending further reporting by operators.

Important Notes:

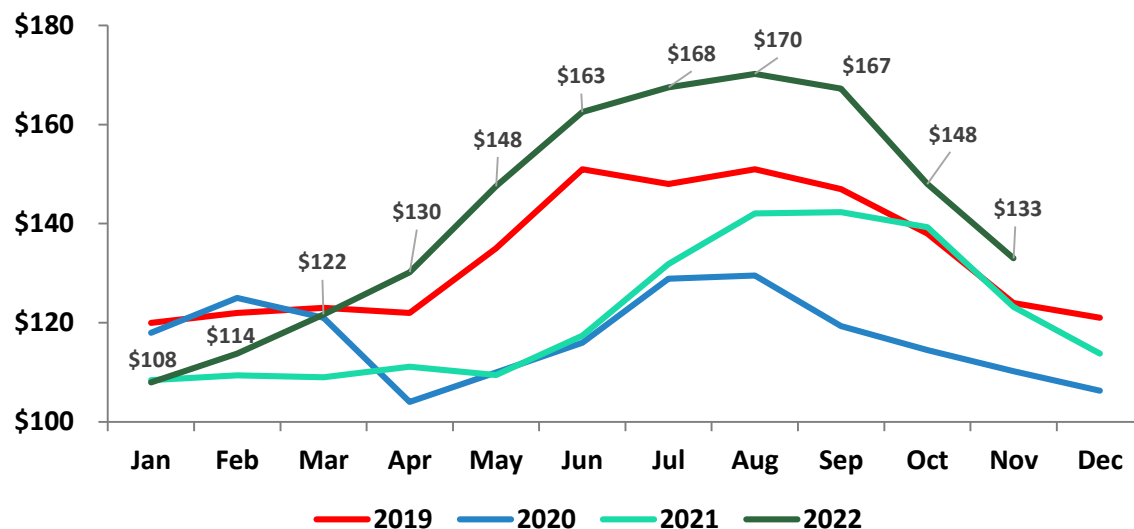
Short-term rental activity reports performance indicators for the province of Newfoundland and Labrador for accommodations that are listed on and booked through the short-term rental platforms Airbnb and Vrbo as reported by AirDNA. Performance is reported for listings which had at least one day classified 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 licenced accommodations as many operators use these platforms as channels to market their properties. Statistics for licenced properties (e.g. nights available, nights booked, occupancy rate) are also included in the "Accommodations" section above.

ACCOMMODATIONS SECTOR

LICENCED ACCOMMODATIONS

NL Licenced Accommodation Average Daily Rate 2019 to 2022



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
2021	1466	1370	1423	1544	1832	2021	2201	2210	2163	1928	1584	1539
2022	1562	1496	1539	1798	2367	2793	3037	3094	2922	2506	2063	1979

NL Short-term Rental Listings (Airbnb, Vrbo) – Average Daily Rate 2021 and 2022

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	\$146	\$169	\$182	\$174	\$184	\$183	\$186	\$185	\$181	\$174	\$171	\$175
2022	\$176	\$195	\$188	\$181	\$184	\$193	\$204	\$207	\$200	\$190	\$195	\$193

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

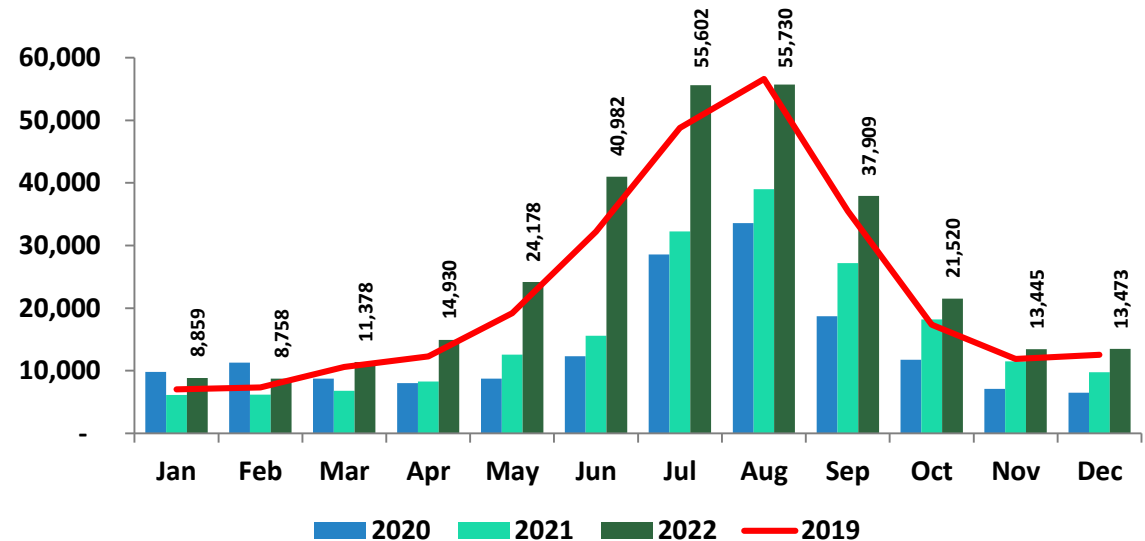
- Short-term Rental Listings:** According to AirDNA reporting, there were 1,979 listings in the province on the Airbnb and Vrbo short-term rental platforms in December 2022. This compares to 1,539 listings in December 2021 (+29%). Of these, 1,332 listings (67% of total listings) had at least one reservation during the month of December 2022. This compares to 1,055 booked listings (69%) in December 2021.
- Nights Available:** For the period January to December 2022, short-term rental properties in the province listed on Airbnb and Vrbo reported 569,554 **nights available** for bookings/reservations compared to 396,30 nights available for the same period in 2021 (+44%).
- Nights Booked:** From January to December 2022, short-term rental properties in the province reported 306,764 **room nights booked**, an increase of 58% compared to the same period in 2021 (193,564).
- Occupancy:** The occupancy rate for short-term rental properties in the province reached 53.9% for the period January to December 2022, an increase of 5.1 points compared to the same period in 2021. The **average daily rate*** reached \$196 for the period January to December 2022, an increase of 9% compared to the same period in 2021 (\$180).

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

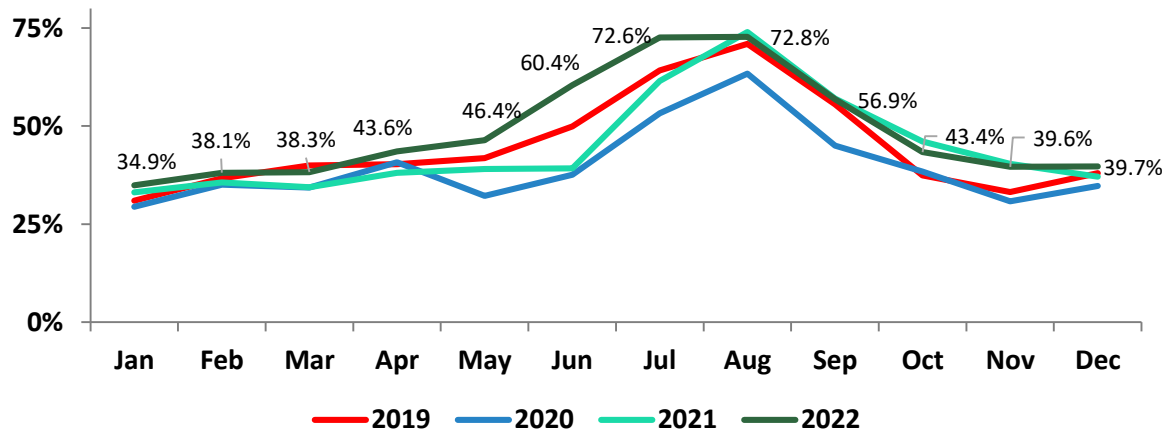
ACCOMMODATIONS SECTOR

SHORT-TERM RENTAL ACTIVITY (CONT'D)

NL Short-term Rental Listings (Airbnb, Vrbo) – Nights Booked 2019 to 2022



NL Short-term Rental Listings (Airbnb, Vrbo) – Occupancy Rate 2019 to 2022



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%
Sub-total (air & auto)	478,100	115,600	181,300	386,900	113%	-19%
Non-resident visitors – cruise	52,400	0	0	44,500	-	-15%
Grand Total	530,500	115,600	181,300	431,400	138%	-19%

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%
Sub-total (air & auto)	\$545.4	\$132.1	\$214.8	\$487.6	127%	-11%
Non-resident expenditures – cruise	\$4.9	\$0	\$0	\$4.6	-	-5%
Grand Total	\$550.3	\$132.1	\$214.8	\$492.2	129%	-11%

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/>

2022 Department of Tourism, Culture, Arts & Recreation Flash Sheet - Key Tourism Indicators Year-to-Date (YTD)

Indicator	YTD	YTD Change vs 2021	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Number of Marine Atlantic Crossings (Both Directions) ¹	1,753	7%	105	99	106	121	148	188	213	212	165	172	114	110
Passenger Traffic on Marine Atlantic (Both Directions) ²	354,461	60%	7,437	6,752	11,003	16,080	22,146	39,148	81,053	78,611	39,962	25,615	13,256	13,398
Non-Residents Exiting (auto) ³	110,600	71%	2,079	1,510	2,738	3,347	4,341	10,014	24,568	32,746	15,339	7,983	3,161	2,798
Residents Exiting (auto) ⁴	59,660	45%	1,747	1664	2,581	4,346	4,922	6,397	10,830	10,104	5,706	4,983	3,175	3,205
Vehicle Traffic on Marine Atlantic (Both Directions) ⁵	140,449	62%	2,509	2,220	3,820	6,149	9,143	16,270	31,041	30,864	17,236	10,633	5,238	5,326
Airport Passenger Movements ⁶	1,696,305	96%	51,118	51,335	88,536	112,307	142,893	182,112	226,916	240,559	184,678	166,641	128,391	120,819
Non-Resident Exiting (air) ⁷	276,300	137%	5,637	4,719	8,298	10,728	17,874	31,551	46,724	64,151	35,593	23,790	14,396	12,827
Roofed Accommodation Occupancy Rates ⁸	51.71%	14.1pts	22.2%	29.6%	35.8%	41.7%	44.5%	65.0%	71.7%	73.5%	64.3%	53.6%	51.7%	
Roofed Accommodation Room Nights Sold ⁹	1,340,811	36%	48,459	58,905	79,425	91,459	109,280	167,330	195,578	196,876	164,020	125,852	103,627	
Short-Term Rentals Occupancy Rates ¹⁰	53.9%	5.1	34.9%	38.1%	38.3%	43.6%	46.4%	60.4%	72.6%	72.8%	56.9%	43.4%	39.6%	39.7%
Short-Term Rentals Booked Nights ¹¹	306,764	58.5%	8,859	8,758	11,378	14,930	24,178	40,982	55,602	55,730	37,909	21,520	13,445	13,473
Provincial Museums ¹²	110,695	90%	1,566	2,809	6,316	6,948	8,046	16,395	19,893	22,548	17,172	9,002	7,975	9,180
Provincial Historic Sites ¹³	117,393	236%					2,955	25,274	35,100	34,995	16,988	2,081		
National Historic Sites ¹⁴	103,638	n/a					n/a	n/a	n/a	n/a	n/a	n/a		
Visitor Information Centres	102,702	121%					6,695	20,014	27,709	26,340	16,087	5,857		

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)
7. Non-resident air visits: Estimates are based on results of the 2016 Provincial Exit Survey Program and 2022 airport boarding passenger volumes; excludes non-resident visitation from Wabush.
- 8, 9. Roofed accommodation occupancy and room nights sold: Data is current as of January 2023 and is subject to revisions pending further reporting by the province's licenced 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 2022. 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 21 to October 2022.
14. National Historic Sites: operating season to October, as available.
15. Visitors to the Provincial VICs cover the period May to October 2022.

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