

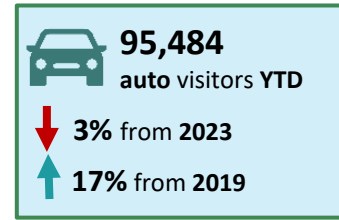
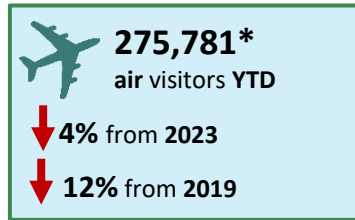
YTD SEPTEMBER 2024 HIGHLIGHTS

- Provincial tourism performance was mixed over the first nine months of 2024 across a range of indicators. Air visitation reached an estimated 275,781*, down 4% from the same period in 2023, while auto visitation reached 95,484, 3% below levels recorded in 2023. Overall air and auto non-resident visitation to the province reached 371,265 from January to September, down 4% from the same period last year.
- Recovery to pre-pandemic 2019 levels has been reached for auto visitation which sits 17% above 2019 levels. Through September, however, air visitation remains 12% below the same period in 2019. Overall, combined air and auto visitation has recovered to 94% of 2019 levels (-6%).
- Inbound non-stop seat capacity to Newfoundland and Labrador has been strong in 2024, up 27% over 2023 levels through September and 8% higher than during the same period in 2019.
- The accommodations sector continued to perform well relative to 2019 through September 2024, however, preliminary data continue to show a slowdown compared to the same period in 2023.** The year-to-date September occupancy rate was 4 points below 2023 levels, with room nights sales down 8% and total room revenue 2% lower. Despite year-to-date declines over 2023, occupancy (+8.3 pts), room night sales (+13%), room revenue (+38%), and ADR (+21%) continue to surpass 2019 levels.

* Preliminary estimates, subject to change

** In 2023, a number of hotel rooms were allocated for use by the Department of Immigration, Population Growth and Skills, impacting performance of the registered accommodation sector and year-over-year comparisons.

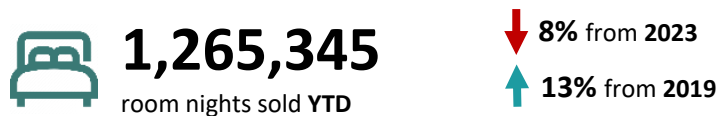
NON-RESIDENT VISITORS (YTD SEPTEMBER 2024)



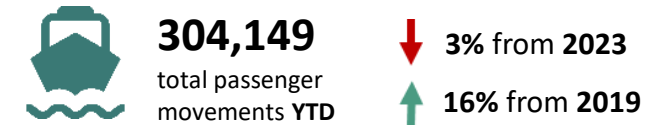
PROVINCIAL HISTORIC SITES & VISITOR INFORMATION CENTRES



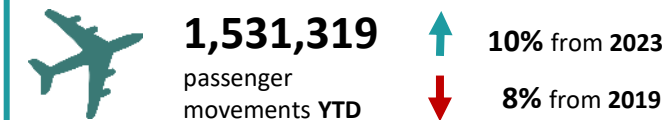
ACCOMMODATIONS (YTD SEPTEMBER 2024)



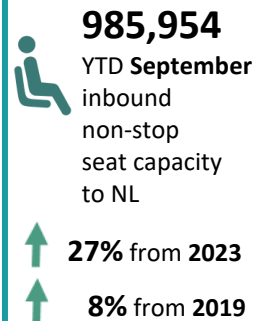
MARINE ATLANTIC PASSENGER MOVEMENTS²



AIRPORT PASSENGER MOVEMENTS¹



SEAT CAPACITY



NOTES / SOURCES

1. 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.

2. Passengers carried (both directions) by Marine Atlantic

3. Roofed accommodation statistics reported in the NL Tourism Operator Portal; current as of August 2024 and subject to revision pending further reporting by registered operators.

*2024 air estimates are preliminary and subject to change.

YTD September 2024 Summary

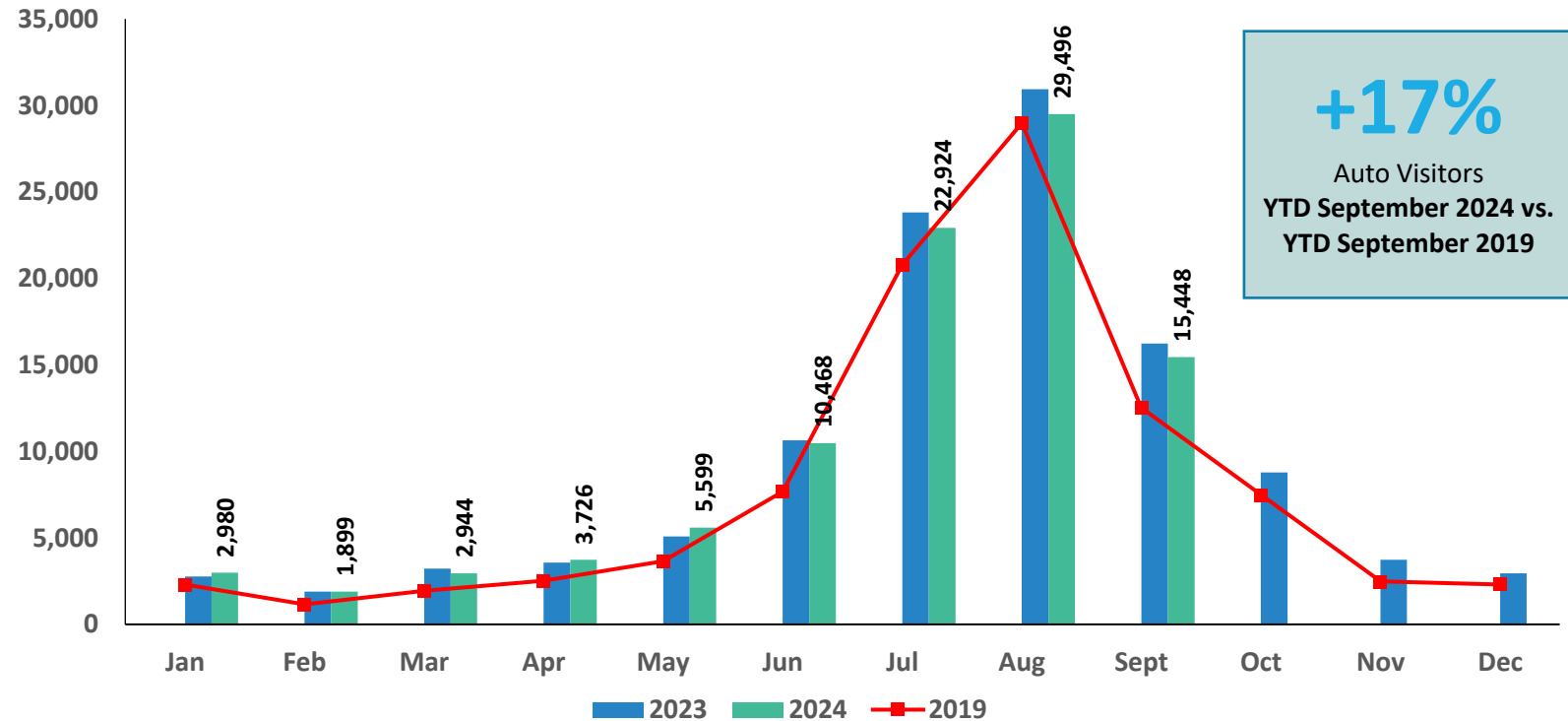
- Ferry Passenger Movements:** Marine Atlantic passenger movements (both directions) reached 304,149 year-to-date September, down 3% from the same period in 2023 (312,590) but up 16% from the same period in 2019 (263,107).
- Passenger-related vehicle (PRV) movements** decreased 3% during this period, from 123,431 last year to 119,763 as of September 2024. PRV movements, however, were still up 19% from 2019 levels over this period. The number of **crossings** decreased slightly from 1,352 last year to 1,346, down less than 1% from 2023 but still 7% above 2019 levels.
- Auto Visitors:** The number of non-resident automobile visitors to the province reached 95,484 to September 2024, a decrease of 3% over the same period in 2023 but 17% higher than during this period in 2019.

September 2024

- Passenger movements for the month of **September 2024** (41,786) were down 2% over September 2023 (42,483) but still 24% above September 2019 levels (33,597). The number of PRV movements in September 2024 (17,895) decreased 3% compared to September 2023 (18,502) but remained 25% higher than in September 2019 (14,276). The number of auto visitors in September reached 15,448, down 5% from September 2023 but up notably (+23%) from September 2019 levels.
- Note:** Year-to-date auto traffic and visitation has likely been impacted by delays in bringing Marine Atlantic’s newest vessel, the Ala’suinu, onto the Argentinia route. The seasonal Argentinia ferry service, originally due to start in June, did not begin until July 10th.

MARINE ATLANTIC PASSENGER MOVEMENTS & AUTO VISITATION

Newfoundland and Labrador Non-resident Auto Visitors 2019-2024



+17%
Auto Visitors
YTD September 2024 vs.
YTD September 2019

304,149
total passenger movements
(both directions) YTD

↓ 3% from 2023 ↑ 16% from 2019

119,763
passenger-related vehicle
movements YTD

↓ 3% from 2023 ↑ 19% from 2019

1,346
total ferry crossings
YTD

↓ 0.4% from 2023 ↑ 7% from 2019

YTD September 2024 Summary

- Air Passenger Movements:** Airport activity (boarding and deplaning passenger movements) for St. John’s, Gander, Deer Lake, St. Anthony, and Goose Bay (Wabush data unavailable) reached 1,531,319 passenger movements year-to-date September 2024, an increase of 10% compared to 2023 and down 8% from 2019 levels for this period.
- Air Visitors:** The number of non-resident air visitors to the province reached an estimated 275,781 from January to September 2024, down 4% from the same period in 2023 and 12% below 2019 levels. **Note: Non-resident air visitor estimates are preliminary only and subject to change.**

September 2024

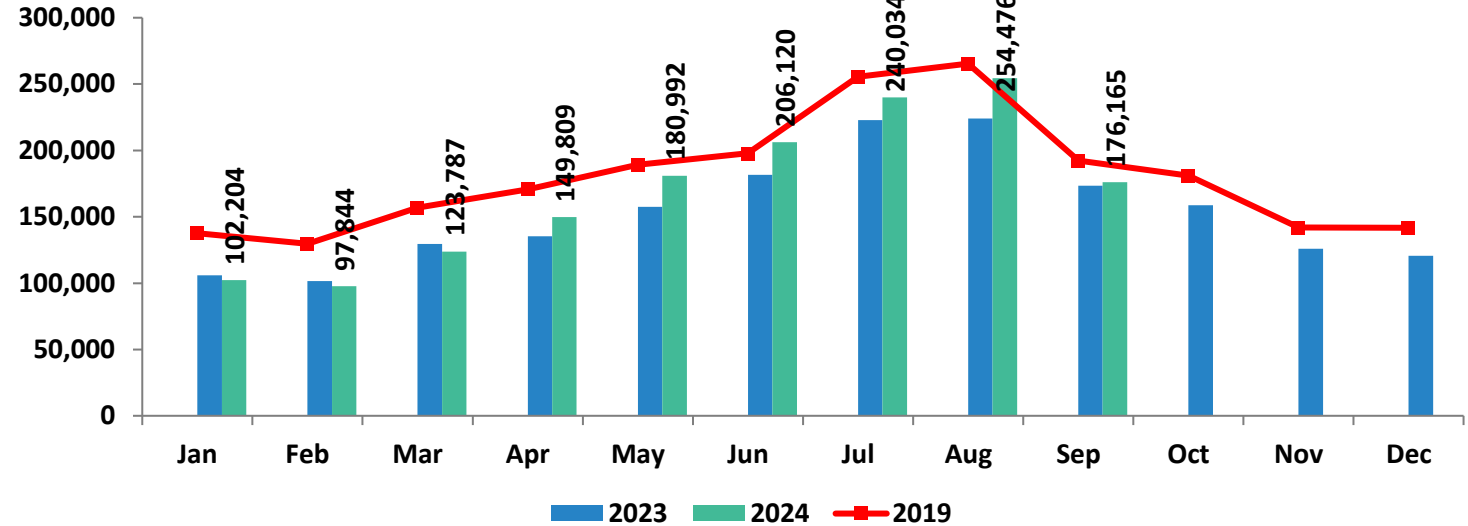
- Passenger movements for the month of **September 2024** (176,165) were up 2% from September 2023 (173,457) but 8% below September 2019 levels (192,285).
- In the month of **September 2024**, non-resident air visitation reached 39,027, 11% below September 2023 (43,628) and 7% lower than than in September 2019 (41,933).

Seat Capacity YTD September

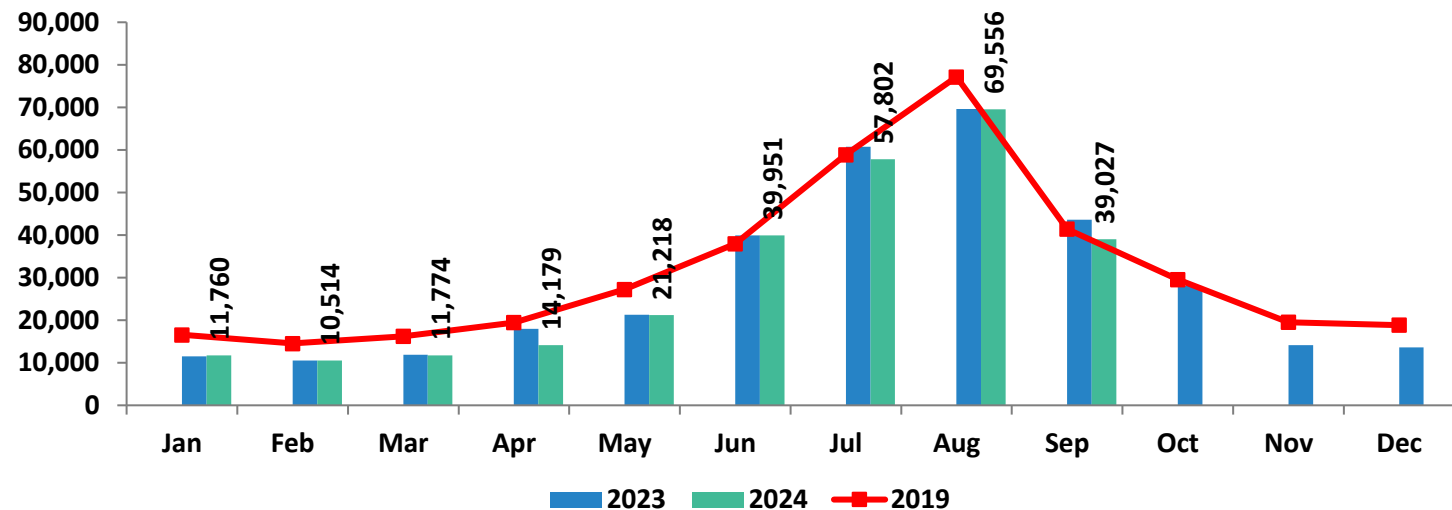
- Seat capacity has been rebuilding and air services have been recovering from the severe cuts during the COVID-19 pandemic. Inbound non-stop seat capacity to NL (7 major airports) has been steadily increasing over the past two years, in particular from major source markets such as Halifax, Toronto, Calgary and Edmonton.
- In the first nine months of 2024, monthly capacity has seen significant increases year-over-year, as high as 40% in January, followed by several months with increases of 30% or more. These increases were driven by airlines introducing new services and re-establishing services available pre-pandemic, including WestJet’s seasonal service between St. John’s and London-Gatwick starting in May. September 2024 (112,548 seats) registered a 10% increase over September 2023 (102,345), bringing the YTD increase to 27% (985,954 versus 777,940 in 2023).
- In 2024, monthly seat capacity has also been surpassing 2019 levels in every month. YTD September 2024, airlines have been offering 73,747 more inbound non-stop seats than during the same time frame in 2019 (985,954 versus 912,207 in 2019; +8%).

AIR PASSENGER MOVEMENTS & VISITATION

Newfoundland and Labrador Airport Passenger Movements 2019-2024



Newfoundland and Labrador Non-resident Air Visitors 2019-2024



*Wabush data unavailable since April 2023

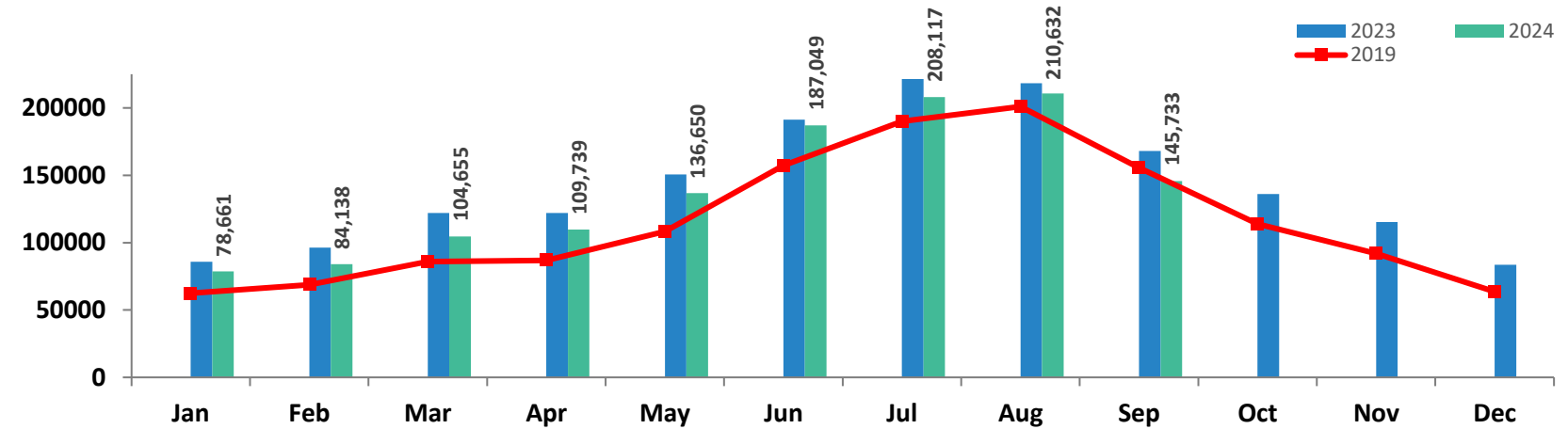
Registered Accommodations

- Room Nights Sold:** Year-to-date September 2024, registered accommodations in the province reported 1,265,345 room nights sold, a decrease of 8% from the same period in 2023 but 13% above the same period in 2019.
- Occupancy:** Accommodation occupancy reached 56.1% from January to September 2024, a decrease of 4.4 points compared the same period of 2023 (60.5%) but still 8.3 points higher than this period of 2019 (47.9%).
- Room Revenue:** Total room revenue reached \$215.8 million from January to September 2024, down 2% from the same period of 2023, but still 38% above the same period in 2019.
- Note:** In 2023, a number of rooms were allocated for use by the Department of Immigration, Population Growth and Skills, impacting performance of the registered accommodation sector and year-over-year comparisons.

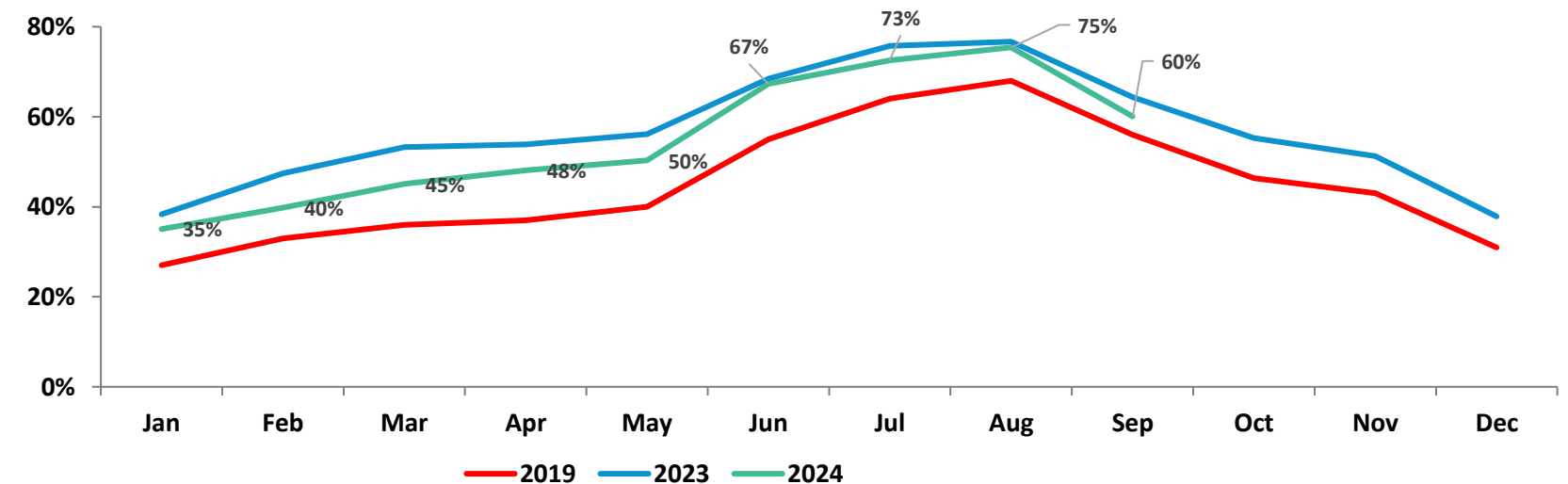
ACCOMMODATIONS SECTOR

REGISTERED ACCOMMODATIONS

NL Registered Accommodation Room Nights Sold 2019-2024



NL Registered Accommodation Occupancy Rate 2019-2024



Registered Accommodations

- **Average Daily Rate (ADR):** The ADR reached \$171 from January to September 2024, up 7% from 2023 (\$160), and up 21% from where it stood during the same period of 2019 (\$140).
- The ADR for the month of September 2024 reached \$182, up 7% from September 2023 (\$170) and 23% above the September 2019 average rate (\$147).
- **Note:** all accommodations data are preliminary and subject to change pending further reporting by operators.

Important Notes:

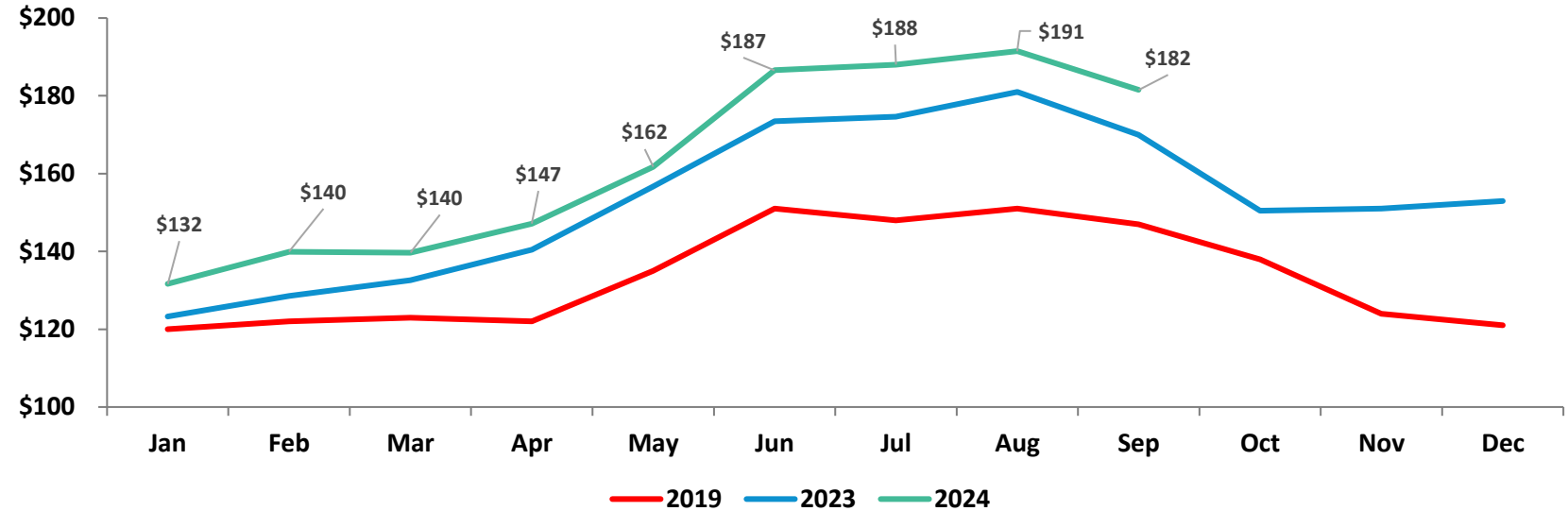
Short-term rental activity reports performance indicators for the province of Newfoundland and Labrador for accommodations that are listed on and booked through the short-term rental platforms Airbnb and Vrbo as reported by AirDNA. Performance is reported for listings which had at least one day classified 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 2019-2024



SHORT-TERM RENTAL ACTIVITY (YTD SEPTEMBER)

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

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2023 | 1,336 | 1,241 | 1,382 | 1,615 | 2,321 | 2,920 | 3,269 | 3,385 | 3,206 | 2,631 | 1,966 | 1,689 |
| 2024 | 1,515 | 1,346 | 1,571 | 1,844 | 2,675 | 3,299 | 3,573 | 3,673 | 3,494 | - | - | - |

NL Short-term Rental Listings (Airbnb, Vrbo) – Average Daily Rate 2023 and 2024

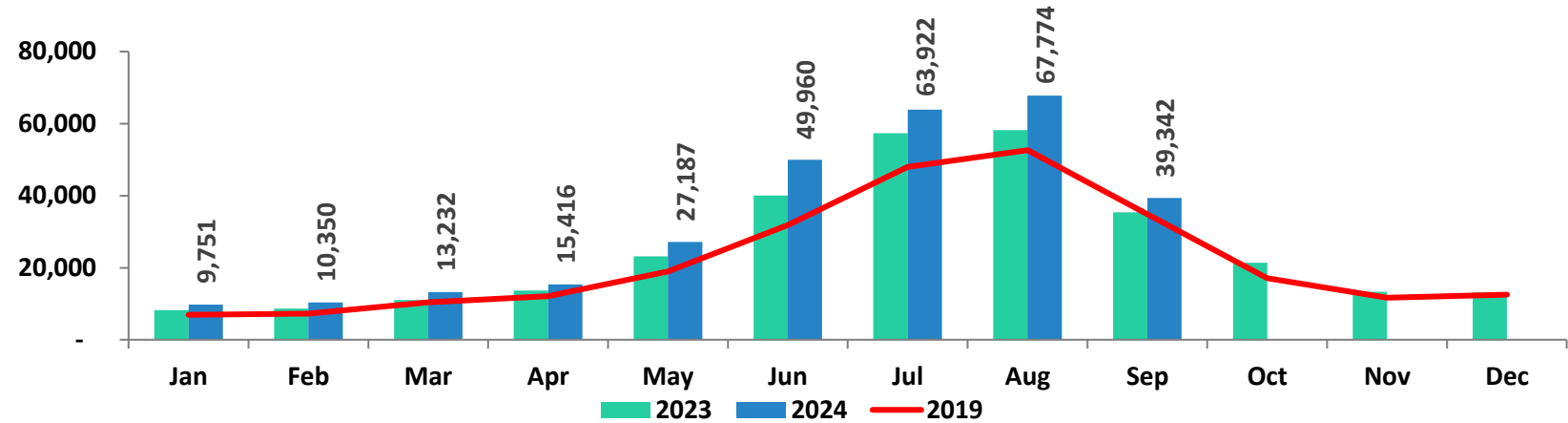
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2023 | \$178 | \$187 | \$186 | \$172 | \$186 | \$196 | \$209 | \$209 | \$194 | \$179 | \$172 | \$166 |
| 2024 | \$161 | \$185 | \$176 | \$177 | \$190 | \$208 | \$216 | \$217 | \$200 | - | - | - |

- Short-term Rental Listings:** According to AirDNA reporting, there were 3,494 listings in the province on the Airbnb and Vrbo short-term rental platforms in September 2024. This compares to 3,206 listings in September 2023 (+9%). Of these, 3,172 listings (91% of total listings) had at least one reservation during the month of September 2024.
- Nights Available:** For the period January to September 2024, short-term rental properties in the province listed on Airbnb and Vrbo reported 529,151 **nights available** for bookings/reservations compared to 470,702 nights available for the same period in 2023 (+12%).
- Nights Booked:** From January to September 2024, short-term rental properties in the province reported 296,934 **room nights booked**, an increase of 16% compared to the same period in 2023 (256,121). Room nights booked in September 2024 (39,342) were 11% higher than in September 2023 (35,457).
- Occupancy:** The occupancy rate for short-term rental properties in the province reached 56.1% for the period January to September 2024, an increase of 1.7 percentage points compared to the same period in 2023. The occupancy rate for September 2024 (47.9%) was up slightly from September 2023 (47.3%).
- The average daily rate (ADR)** reached \$204 for the period January to September 2024, up 5% compared to the same period in 2023 (\$198). At \$200, the ADR for September 2024 was up from \$194 in September 2023.

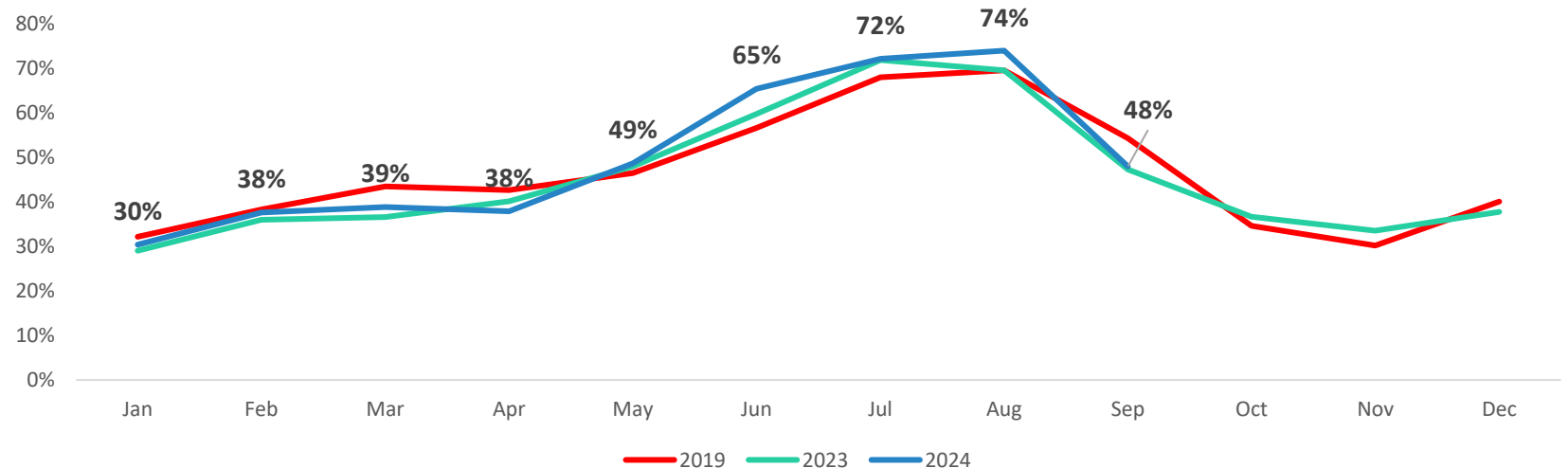
ACCOMMODATIONS SECTOR

SHORT TERM RENTAL ACTIVITY (YTD SEPT)

NL Short-term Rental Listings (Airbnb, Vrbo) – Nights Booked 2019, 2023 and 2024



NL Short-term Rental Listings (Airbnb, Vrbo) – Occupancy Rate 2019, 2023 and 2024



Background Tourism Performance 2019 – 2023

- The number of non-resident air, automobile and cruise visitors travelling to the province reached an estimated 525,700 in 2023, an increase of 12% compared to 2022 and 1% below 2019 levels. Preliminary in-province expenditures by non-residents are estimated at \$601.1 million, an increase of 12% compared to 2022 and 9% above 2019 levels.
- The preliminary number of non-resident air visitors travelling to the province reached an estimated 343,000 in 2023, an increase of 10% compared to 2022, but still 11% below 2019 levels. Preliminary in-province expenditures by non-resident air visitors are estimated at \$444.2 million, an increase of 13% compared to 2022 and up 1% 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 \$149.6 million, increasing 6% compared to 2022 and 40% 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.

*2022/2023 and YoY comparisons exclude Wabush (numbers not available); 2023 estimates are preliminary and subject to change

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 | 312,300 | 343,000 | 10% | -11% |
| Non-resident visitors – auto | 93,800 | 110,600 | 113,600 | 3% | 21% |
| Sub-total (air & auto) | 478,100 | 422,900 | 456,600 | 8% | -4% |
| Non-resident visitors – cruise | 52,400 | 44,500 | 69,100 | 55% | 32% |
| Grand Total | 530,500 | 467,400 | 525,700 | 12% | -1% |

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 | \$393.8 | \$444.2 | 13% | 1% |
| Non-resident expenditures – auto | \$106.8 | \$139.1 | \$149.6 | 6% | 40% |
| Sub-total (air & auto) | \$545.4 | \$532.9 | \$593.7 | 12% | 9% |
| Non-resident expenditures – cruise | \$4.9 | \$4.6 | \$7.4 | 59% | 51% |
| Grand Total | \$550.3 | \$537.6 | \$601.1 | 12% | 9% |

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/>

2024 Department of Tourism, Culture, Arts & Recreation Flash Sheet - Key Tourism Indicators Year-to-Date (YTD)

| Indicator | YTD | YTD Change vs 2023 | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|-----------|--------------------|---------|--------|---------|---------|---------|---------|---------|---------|---------|-------|-----|-----|
| Number of Marine Atlantic Crossings (Both Directions) ¹ | 1,346 | -0.4% | 104 | 94 | 105 | 115 | 149 | 188 | 210 | 201 | 180 | | | |
| Passenger Traffic on Marine Atlantic (Both Directions) ² | 304,149 | -3% | 10,509 | 7,679 | 12,678 | 17,104 | 25,847 | 39,905 | 73,879 | 74,764 | 41,786 | | | |
| Non-Residents Exiting (auto) ³ | 95,484 | -3% | 2,980 | 1,899 | 2,944 | 3,726 | 5,599 | 10,468 | 22,924 | 29,496 | 15,448 | | | |
| Residents Exiting (auto) ⁴ | 50,601 | -4% | 2,516 | 1,636 | 3,126 | 3,996 | 5,689 | 6,332 | 10,367 | 10,837 | 6,102 | | | |
| Vehicle Traffic on Marine Atlantic (Both Directions) ⁵ | 119,763 | -3% | 3,685 | 2,455 | 4,507 | 6,498 | 10,110 | 16,284 | 28,744 | 29,588 | 17,895 | | | |
| Airport Passenger Movements ⁶ | 1,531,319 | 10% | 102,204 | 97,844 | 123,787 | 149,809 | 180,992 | 206,120 | 240,034 | 254,476 | 176,165 | | | |
| Non-Resident Exiting (air) ⁷ | 275,781 | -4% | 11,760 | 10,514 | 11,774 | 14,179 | 21,218 | 39,951 | 57,802 | 69,556 | 39,027 | | | |
| Roofed Accommodation Occupancy Rates ⁸ | 56.1% | -4.4 pts | 35.1% | 40.0% | 45.1% | 48.1% | 50.3% | 67.3% | 72.5% | 75.4% | 60.1% | | | |
| Roofed Accommodation Room Nights Sold ⁹ | 1,265,374 | -8% | 78,661 | 84,138 | 104,655 | 109,739 | 136,650 | 187,049 | 208,117 | 210,632 | 145,733 | | | |
| Short-Term Rentals Occupancy Rates ¹⁰ | 56.1% | 1.97pts | 30.4% | 37.7% | 38.9% | 37.9% | 48.6% | 65.3% | 72.2% | 73.8% | 47.9% | | | |
| Short-Term Rentals Booked Nights ¹¹ | 296,934 | 16% | 9,751 | 10,350 | 13,232 | 15,416 | 27,187 | 49,960 | 63,922 | 67,774 | 39,342 | | | |
| Provincial Museums ¹² | 111,985 | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | | | |
| Provincial Historic Sites ¹³ | 93,517 | 8% | | | | | 3,773 | 20,044 | 28,189 | 26,989 | 14,522 | | | |
| National Historic Sites ¹⁴ | n/a | n/a | | | | | n/a | n/a | n/a | n/a | n/a | | | |
| Visitor Information Centres | 125,874 | 8% | | | | | 11,014 | 25,742 | 37,764 | 29,688 | 17,611 | 4,055 | | |

- 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 since April 2023.
 - Non-resident air visits: Estimates are based on results of the 2023 Provincial Exit Survey Program and 2024 airport boarding passenger volumes; excludes non-resident visitation from Wabush.
 - , 9. Roofed accommodation occupancy and room nights sold: Data is current as of August 2024 and is subject to revisions pending further reporting by the province's registered operators.
 - , 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
 - Provincial Museums (data as available): The Rooms – January to December; Demasduit Regional Museum, Seamen's Museum and Labrador Interpretation Centre – May to October.
 - Provincial Historic Sites operating season May to October/November.
 - National Historic Sites: operating season to October, as available.
 - 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