



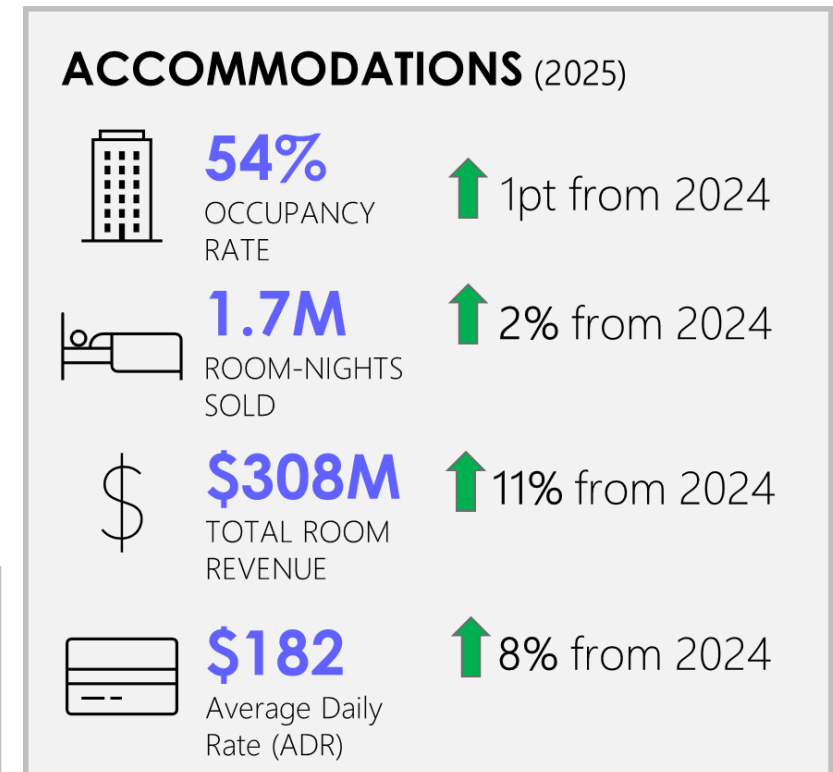
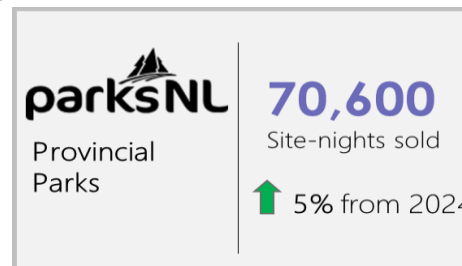
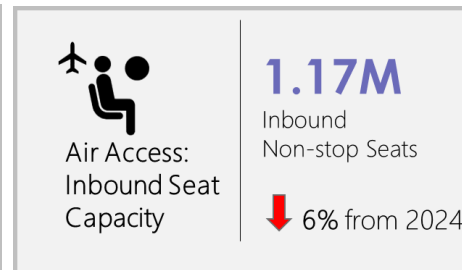
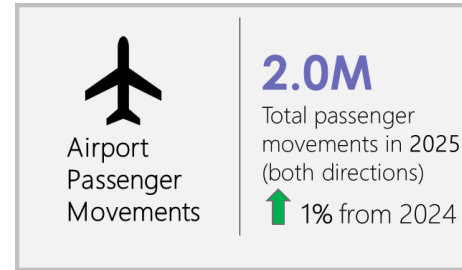
2025 TOURISM KEY PERFORMANCE INDICATORS

2025 TOURISM HIGHLIGHTS

- 2025 v. 2024:** Provincial tourism performance was strong in 2025 across a range of indicators. An estimated 338,230 visitors arrived by air, up 2% from 2024, 121,460 visitors arrived by vehicle and ferry, up 10%, and 72,100 visitors arrived by cruise, down 15%. Overall, Newfoundland and Labrador recorded 531,800 air, auto and cruise visitors, 1% more than in 2024, while the air and auto visitation was up 4%. Airport (+1%) and Marine Atlantic (+6%) passenger movements both exceeded 2024 levels.
- Visitor Spending:** Visitors spent an estimated \$625.6 million in Newfoundland and Labrador in 2025, 5% more than in 2024. Resident tourism spending estimates are pending.
- Air Access:** Inbound non-stop seat capacity to Newfoundland and Labrador declined in 2025 to 1.17 million seats, down 6% over 2024 levels. Seat capacity remains 12% lower than during peak seat capacity levels recorded in 2016.
- Accommodations:** The sector continued to perform well in 2025. At 54%, the provincial occupancy rate was up 1 point from 2024, with room nights sales up 2%. Total room revenue generated surpassed \$300 million for the first time, up 11%, while the average daily rate increased 8%.
- Attractions:** Visits to major sites and attractions, including Provincial Historic Sites and National Historic Sites, all increased over 2024. Visits to provincial Visitor Information Centres declined 7%.
- ParksNL:** 2025 was a record year for Provincial Parks, with increases in site-nights sold, visits and revenue.

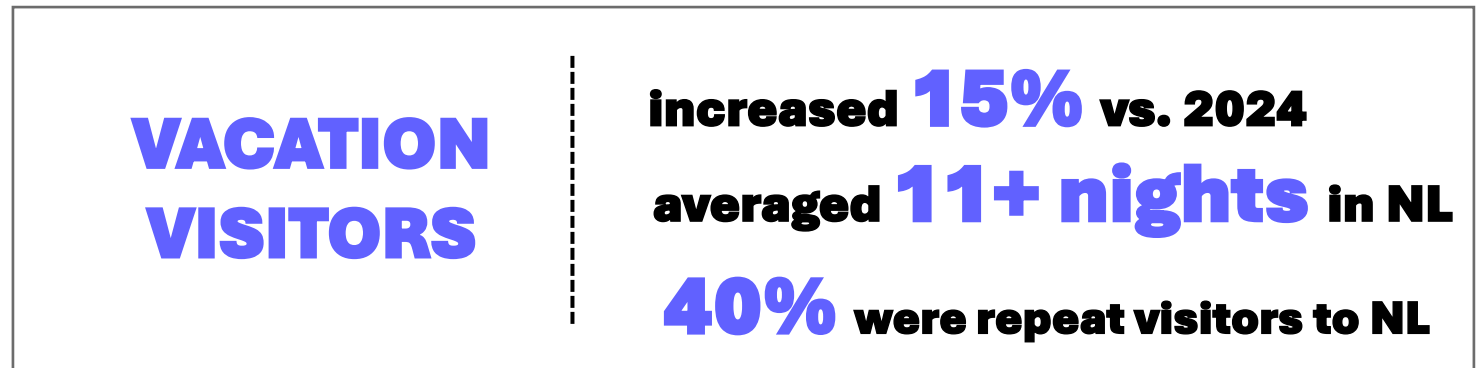
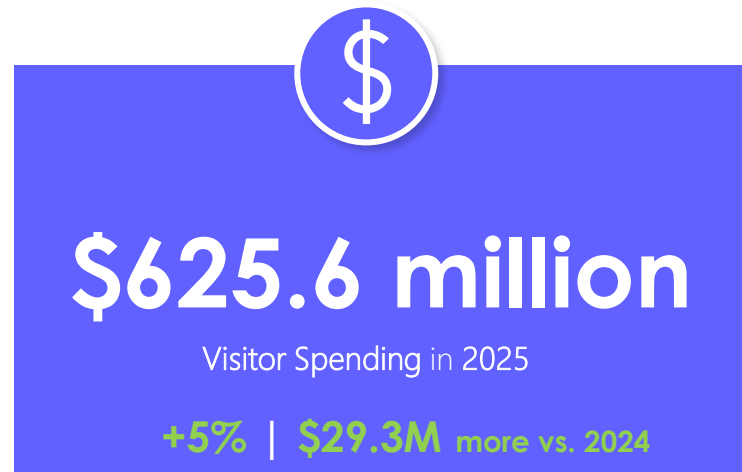
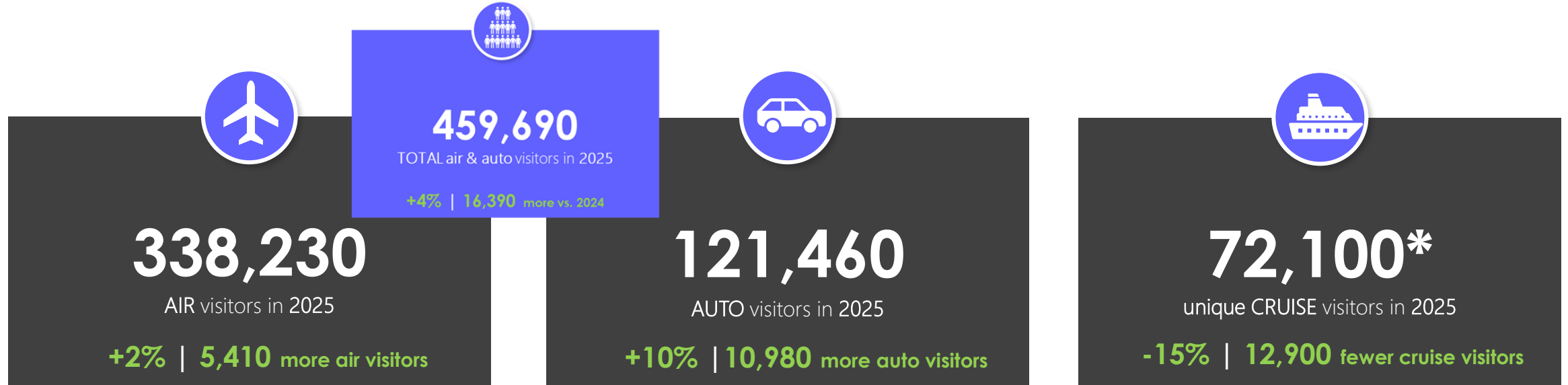


Department of Tourism, Culture, Arts and Recreation Newfoundland & Labrador: 2025 Key Tourism Indicators*



*Data subject to change; sources listed at end of document.

IN 2025, NEARLY 532,000 VISITORS ARRIVED BY PLANE, FERRY OR CRUISE - SPENDING OVER \$625 MILLION IN NL



*Note: TCAR estimates 'unique cruise visitors' to the province based on total passenger-visits. This ensure cruise visitors who visit multiple ports are not counted more than once in total visitor counts. Unique cruise visitor counts will differ from passenger-visit counts often referenced by CruiseNL.



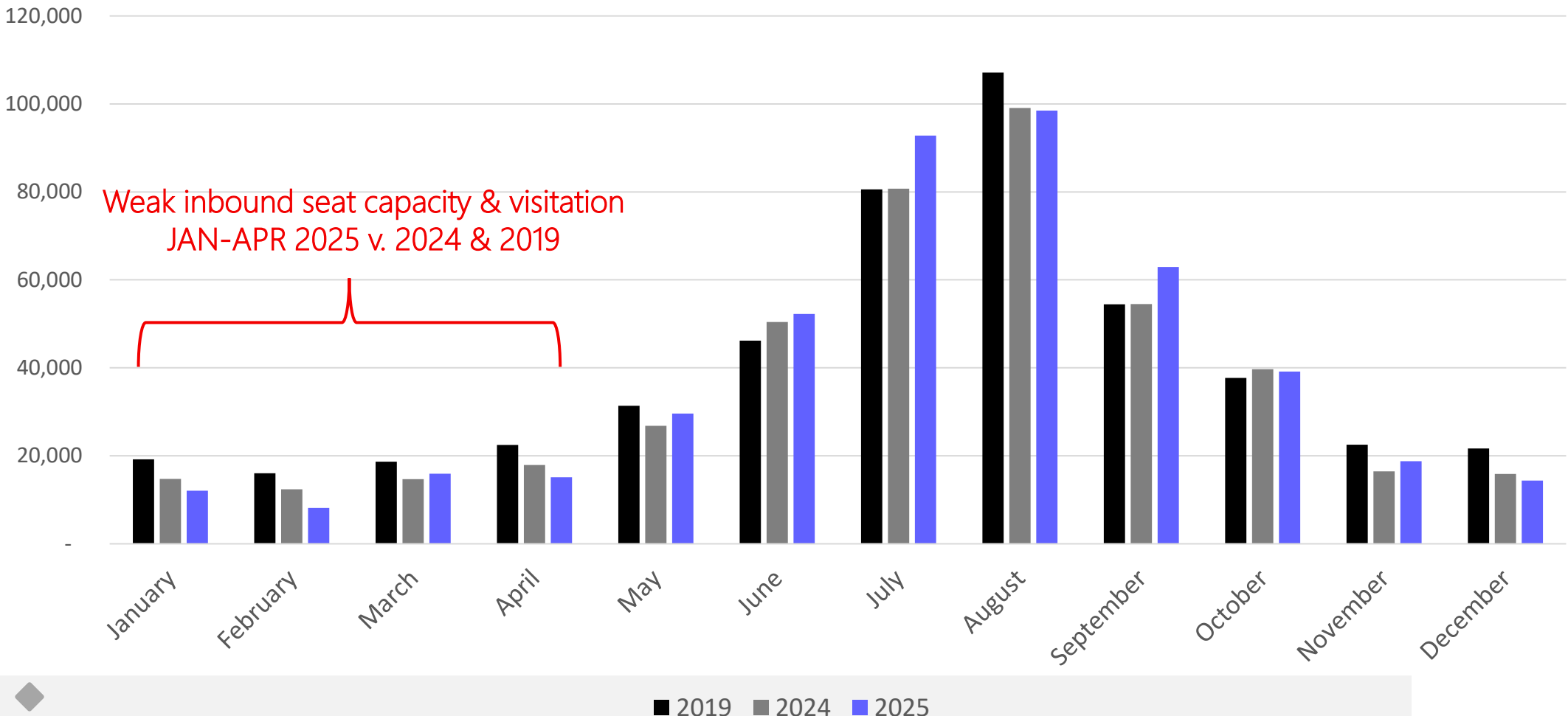
2025 WAS A STRONG YEAR FOR DOMESTIC VISITATION FROM CANADIAN MARKETS WITH SOFTNESS FROM THE US AND INTERNATIONAL MARKETS

Visitor Origin 2025 v. 2024
(Excludes cruise visitor origin)



PEAK SEASON GROWTH WAS STRONGER

Following a slow start to 2025, visitation ramped up from May through October. NL recorded **24,100 more visitors (+7%)** during peak season (May-Oct) in 2025 compared to 2024 & **18,500 more (+5%)** than during the same period in 2019



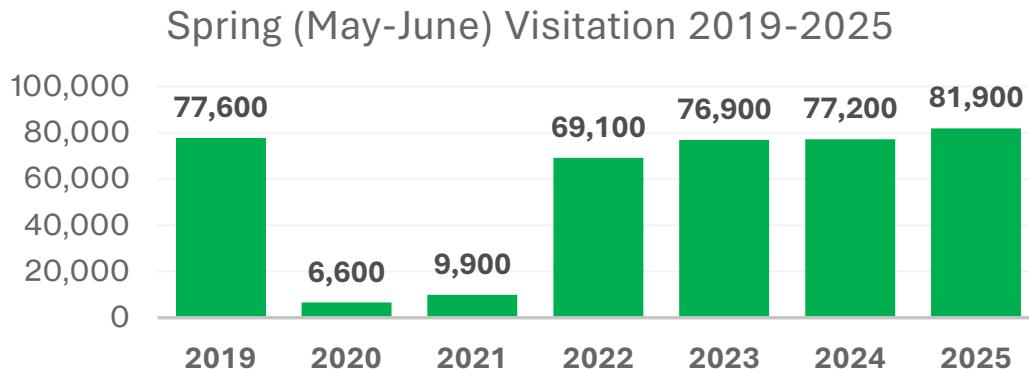
SPRING & FALL VISITATION CONTINUES TO GROW



Spring Visitors
81,900

+4,600
more visitors in
May & June

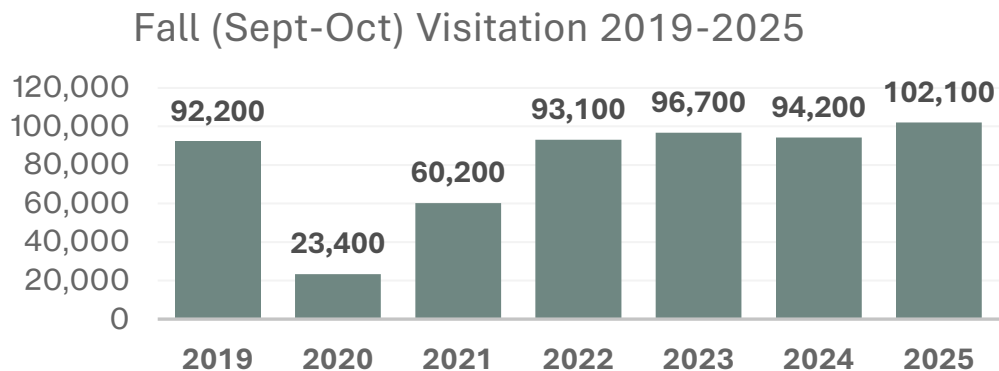
↑ 6% from 2024




Fall Visitors
102,100

+7,900
more visitors in
Sept & Oct

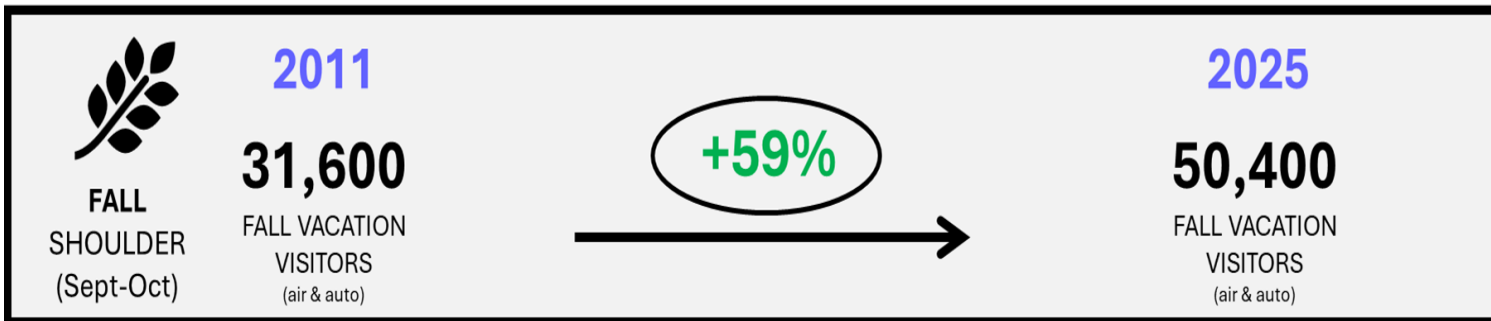
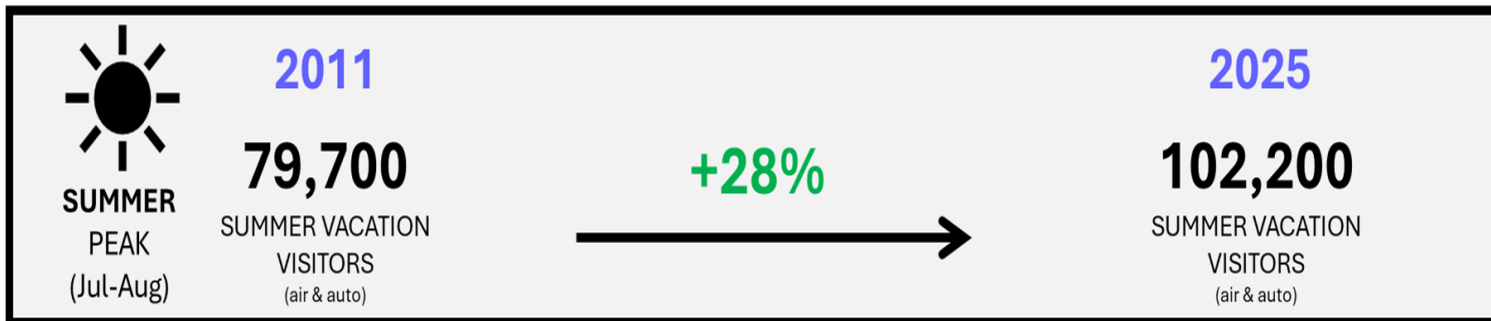
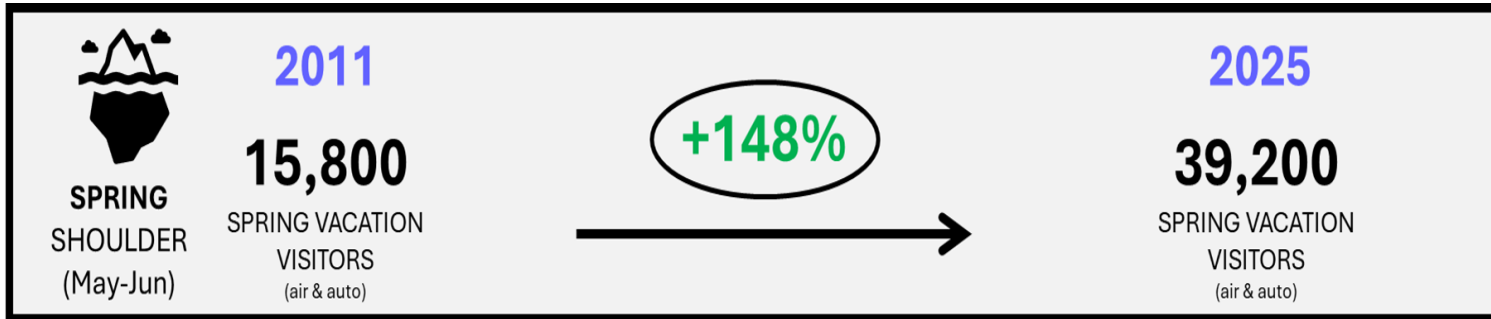
↑ 8% from 2024



- Progress continues to be made towards extending the tourism season beyond the traditional peak summer months.
- Visitation (for vacation, business, visiting friends/relatives) in the spring (May-June) and fall (September-October) continues to grow, with spring visitation up 6% and fall up 8% over 2024 levels.
- Since 2019, spring visitation has increased 6% while fall visitation has increased 11%. The longer-term trend is also positive, with a 25% increase in spring visits and a 15% increase in fall visits since 2011.

VACATION VISITORS BY SEASON

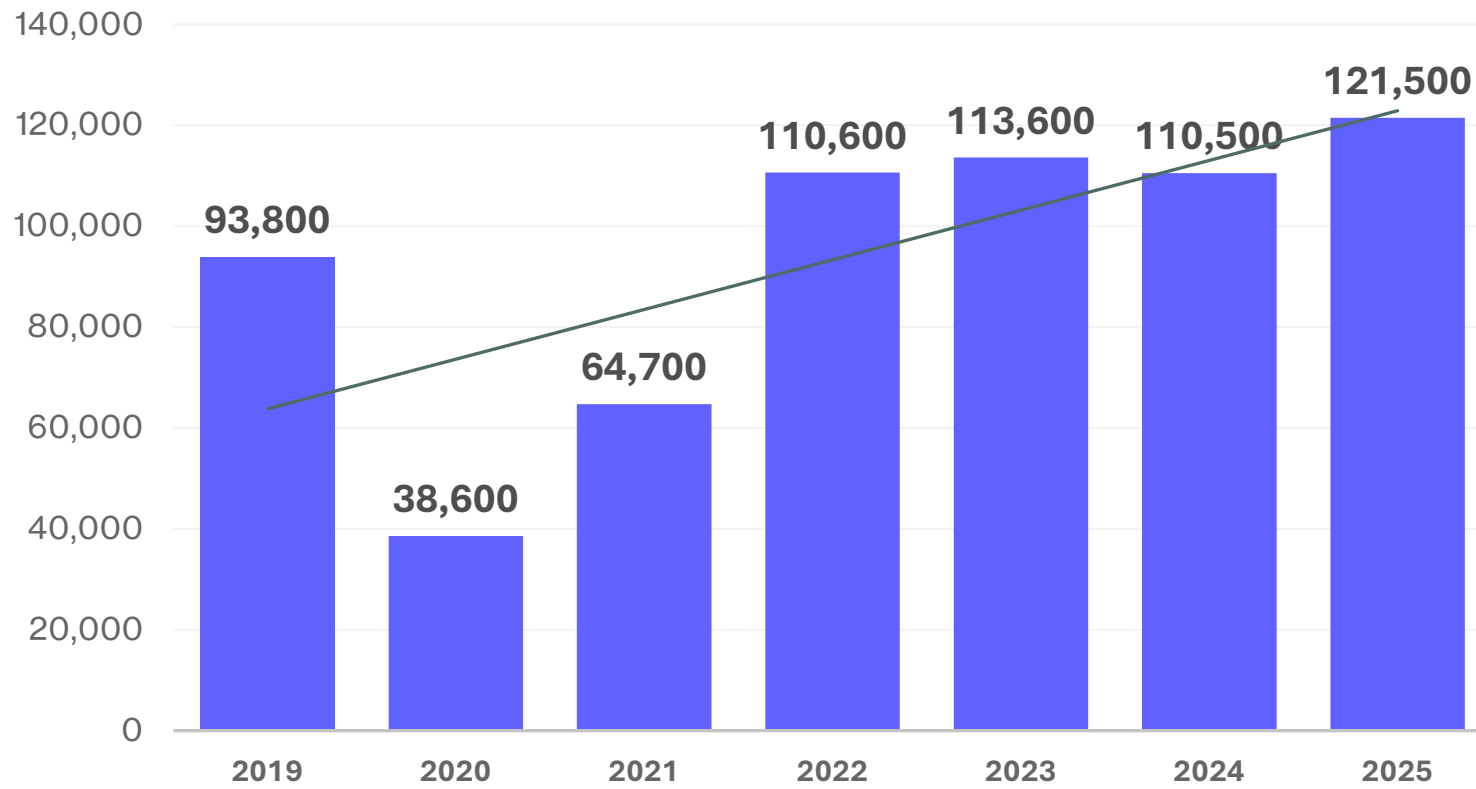
Number of visitors coming to NL for vacation in spring and fall continues to grow



- The number of visitors travelling to the province specifically for vacation in the spring and fall has increased significantly, with growth outpacing that experienced in the peak summer months of July and August.
- Vacation visitation in the spring (May-June) has increased 148% between 2011 and 2025 to reach 39,200 visitors, while vacation visitation in the fall months (Sept-Oct) has increased 59% to over 50,400 visitors.
- The majority of vacation visitors still visit NL in the summer, with 102,200 visitors in July and August. While the number of visitors in the province for vacation during the peak summer months of July and August has also increased 28% over this timeframe, growth in the spring and fall has been stronger.

AUTO VISITATION HAS INCREASED 29% SINCE 2019

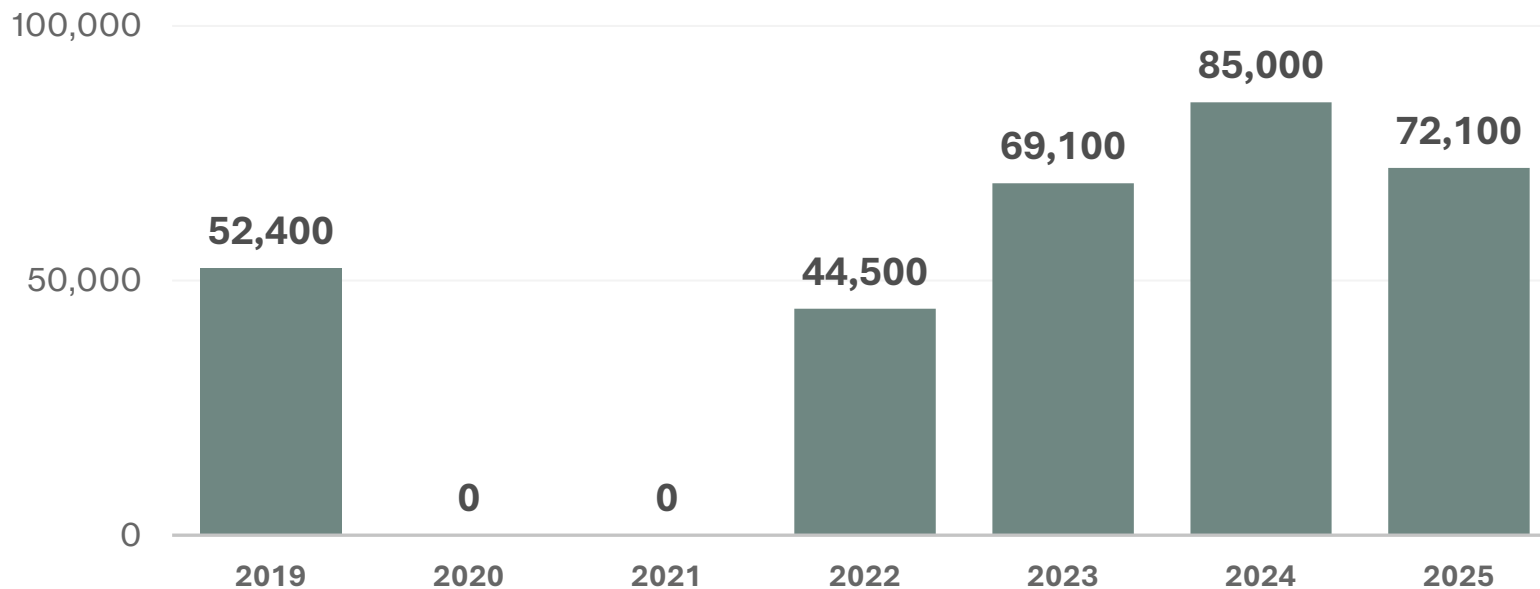
Marine Atlantic - Auto Visitors
to Newfoundland and Labrador 2019-2025



- Nearly 121,500 visitors arrived by car and ferry in 2025, an increase of 10% from 2024 and 29% more than in 2019.
- Auto visitation to the province has been on an upward trajectory, along with other metrics such as passenger movements and passenger-related vehicle movements (PRVs).
- Marine Atlantic passenger movements (both directions) reached 380,100 in 2025, up 6% from 2024, while the number of crossings reached 1,762, up 3%.

CRUISE VISITATION HAS INCREASED 38% SINCE 2019

Unique Cruise Visitors to Newfoundland and Labrador
2019-2025

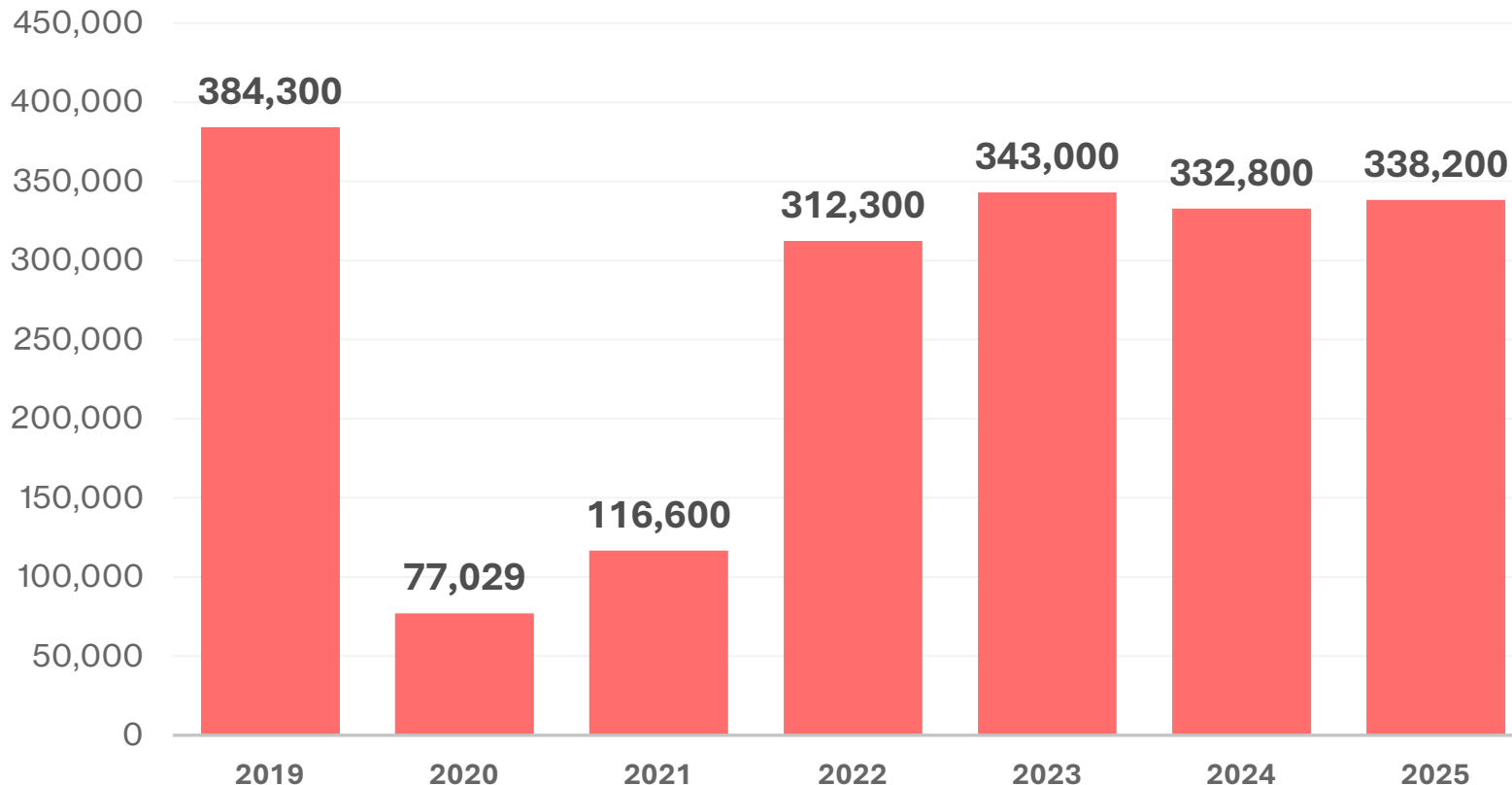


- In 2025, there were over 180 cruise ship calls across 24 ports and destinations (includes 22 calls to Saint-Pierre et Miquelon). Approximately 94,000 passenger-visits and over 40,000 crew member visits were recorded.
- There were an estimated 72,100 unique cruise visitors to the province. TCAR estimates 'unique cruise visitors' to the province based on total passenger-visits. This ensure cruise visitors who visit multiple ports are not counted more than once in total visitor counts. Unique cruise visitor counts will differ from passenger-visit counts.
- 2025 marked the longest cruise season in provincial history running from January to late October. It included 9 inaugural visits, 8 turnarounds and several overnight stays.
- The season included a diverse mix of contemporary, expedition, and luxury ships which visited a growing number of ports throughout the province.



AIR VISITATION INCREASED 2% IN 2025 OVER 2024 LEVELS BUT REMAINS 12% LOWER THAN IN 2019

Air Visitors to Newfoundland and Labrador 2019-2025

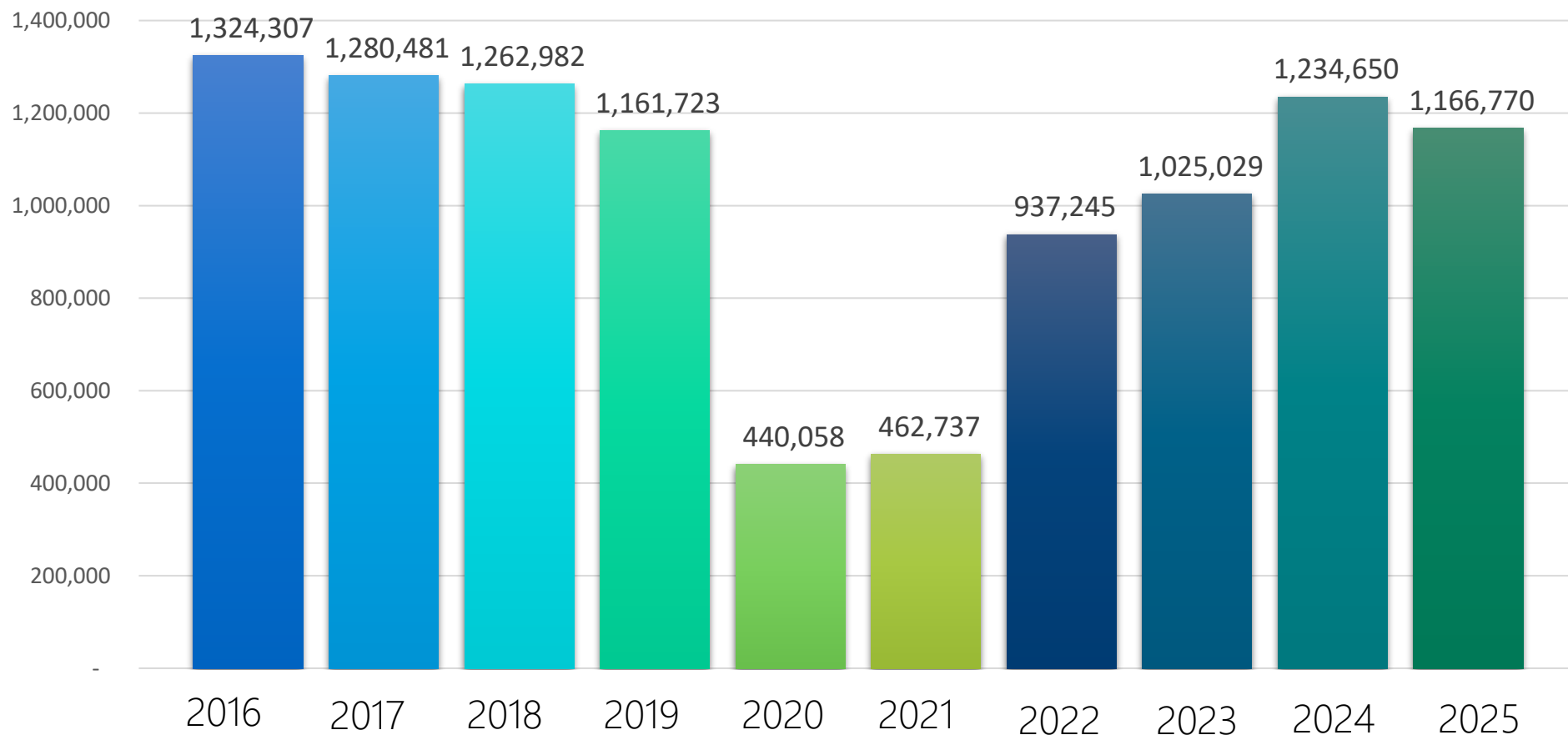


- The number of visitors arriving by air reached 338,200 in 2025, up 2% from 2024 levels. Despite this year-over-year growth, air visitation remains 12% lower than in 2019.
- Total passenger movements at the province's major airports reached nearly 2 million in 2025, up 1% from 2024.
- Air visitation continues to be impacted by lower levels of business travel to the province as well as weaker inbound seat capacity from key markets in Ontario and the Maritimes.

AIR ACCESS: INBOUND SEAT CAPACITY 2025

Seat capacity remains below peak levels seen in 2016

Inbound Non-stop Seats to Newfoundland and Labrador 2016-2025



- There were 1.17 million non-stop inbound seats to Newfoundland and Labrador in 2025, a decrease of 5% (68,000 fewer seats) compared to 2024.
- While 2025 seat capacity levels were on par with 2019 levels, inbound seats from key source markets such as Ontario and the Maritimes remain lower.
- In 2025, inbound seat capacity remained 12% below peak levels recorded in 2016 when there were 1.32 million inbound seats.

ACCOMMODATIONS SECTOR UPDATE 2025*

ACCOMMODATIONS (2025)

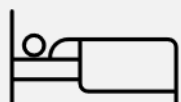


54%

OCCUPANCY
RATE



1pt from 2024

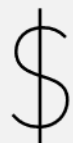


1.7M

ROOM-NIGHTS
SOLD



2% from 2024

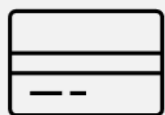


\$308M

TOTAL ROOM
REVENUE



11% from 2024



\$182

Average Daily
Rate (ADR)



8% from 2024

- Accommodations sector metrics remained positive through 2025, with increases in room sales compared to 2024 (+2%), higher revenue (\$308M; +11%) and higher average daily rate (\$182 ADR; +8%). **Provincial room revenue surpassed \$300 million for the first time ever.** All indicators continue to pace well ahead of 2019 levels.
- The provincial occupancy rate was 54% in 2025, with occupancy levels higher during the May to October period (64%) and during peak summer months of July and August (76%).
- The provincial ADR continues to increase, sitting well above 2019 levels for all accommodation types as well as for the hotels/motels sub-group of accommodations. The ADR peaked in August reaching \$225 and remained elevated into September at \$198.
- Room-night sales and revenue were up across all regions except Labrador, with the Central region recording the largest increases in room sales (+11%) and revenue (+18%). Avalon, Eastern and Western recorded revenue increases ranging from 10-12%.



REGIONAL ACCOMMODATIONS SECTOR UPDATE

2025 (% change v. 2024)

Labrador

Room-night sales: 183,510 **-6%**
 Revenue: \$31.1M **-2%**
 ADR: \$166 **+5%**

Central

Room-night sales: 240,514 **+11%**
 Revenue: \$50.6M **+18%**
 ADR: \$211 **+7%**

Eastern

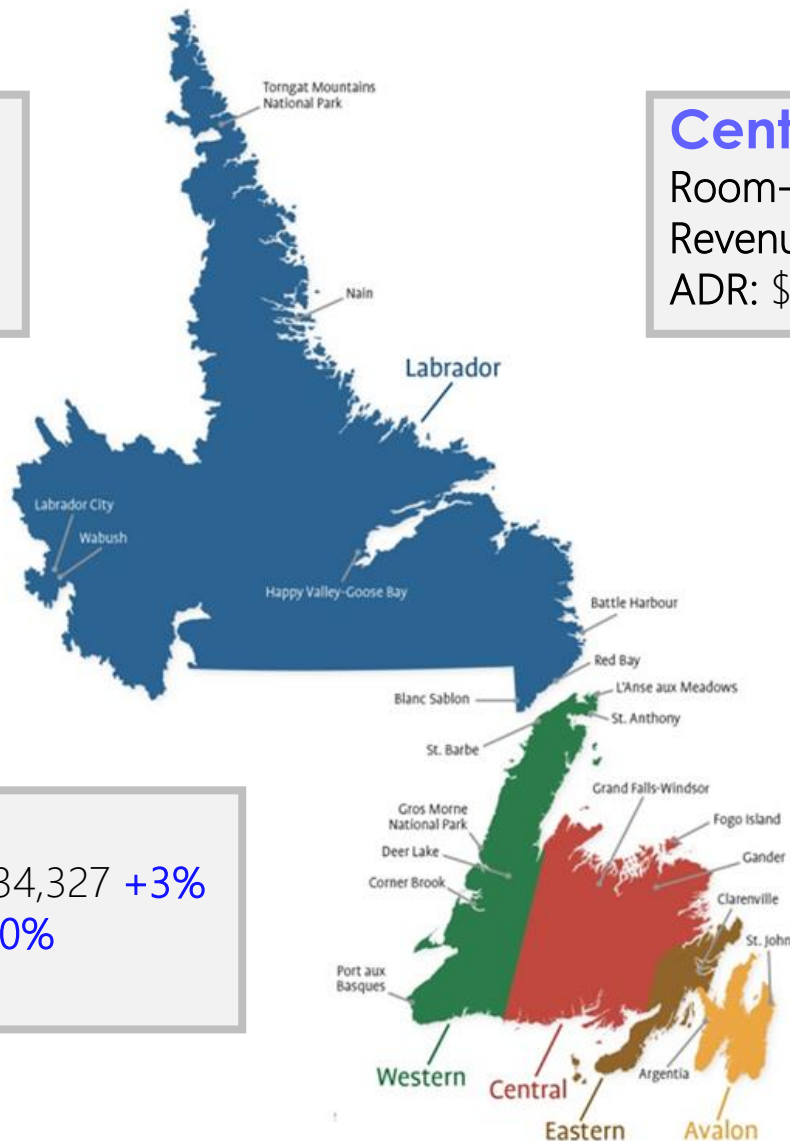
Room-night sales: 114,291 **+2%**
 Revenue: \$20M **+10%**
 ADR: \$175 **+8%**

Western

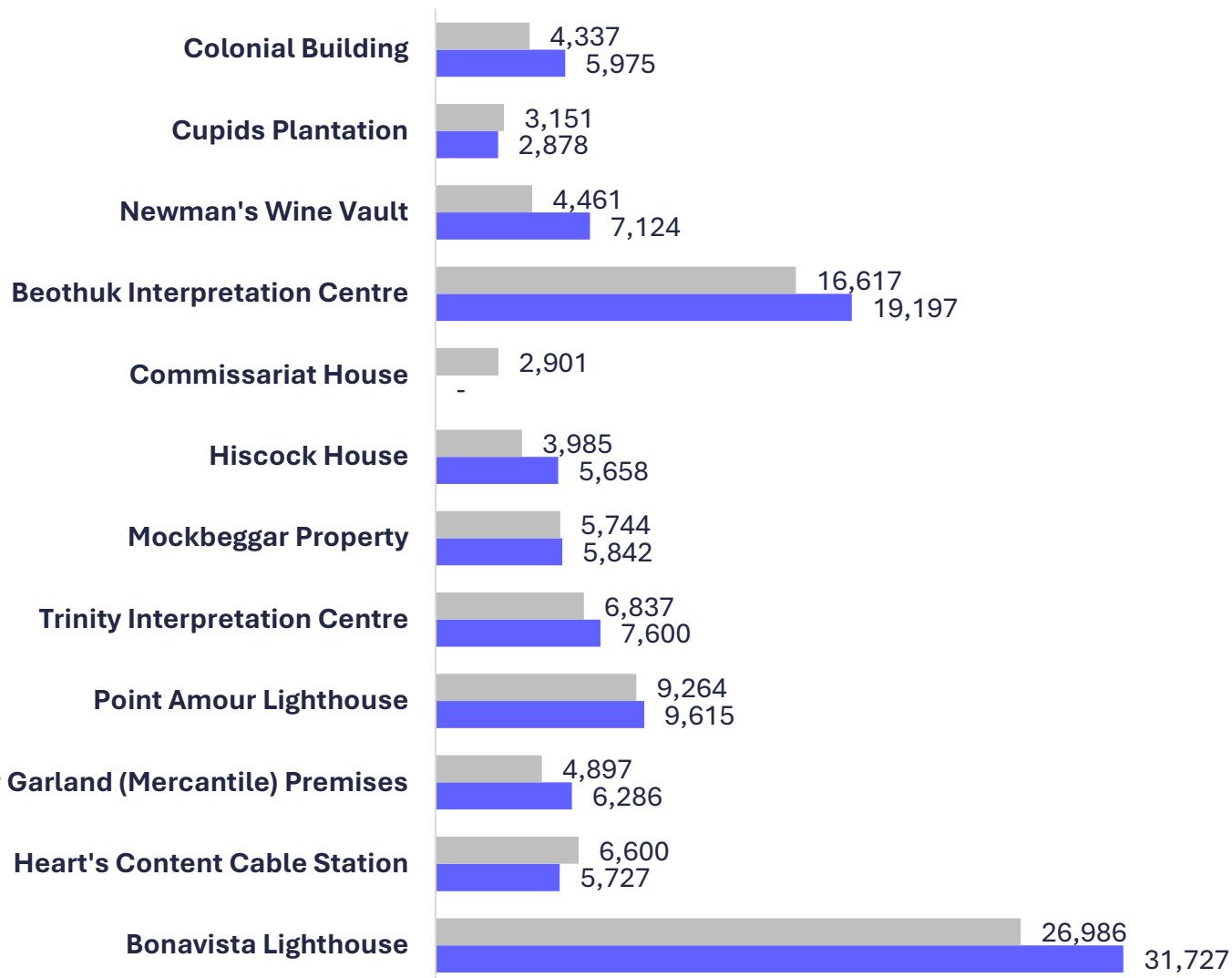
Room-night sales: 334,327 **+3%**
 Revenue: \$55.7M **+10%**
 ADR: \$167 **+7%**

Avalon

Room-night sales: 814,383 **+2%**
 Revenue: \$150.8M **+12%**
 ADR: \$185 **+10%**



PROVINCIAL HISTORIC SITES (PHS) VISITATION INCREASED 12% IN 2025



PROVINCIAL HISTORIC SITES

Provincial Historic Sites Visitation

107,600

Total visitors (May-Oct)

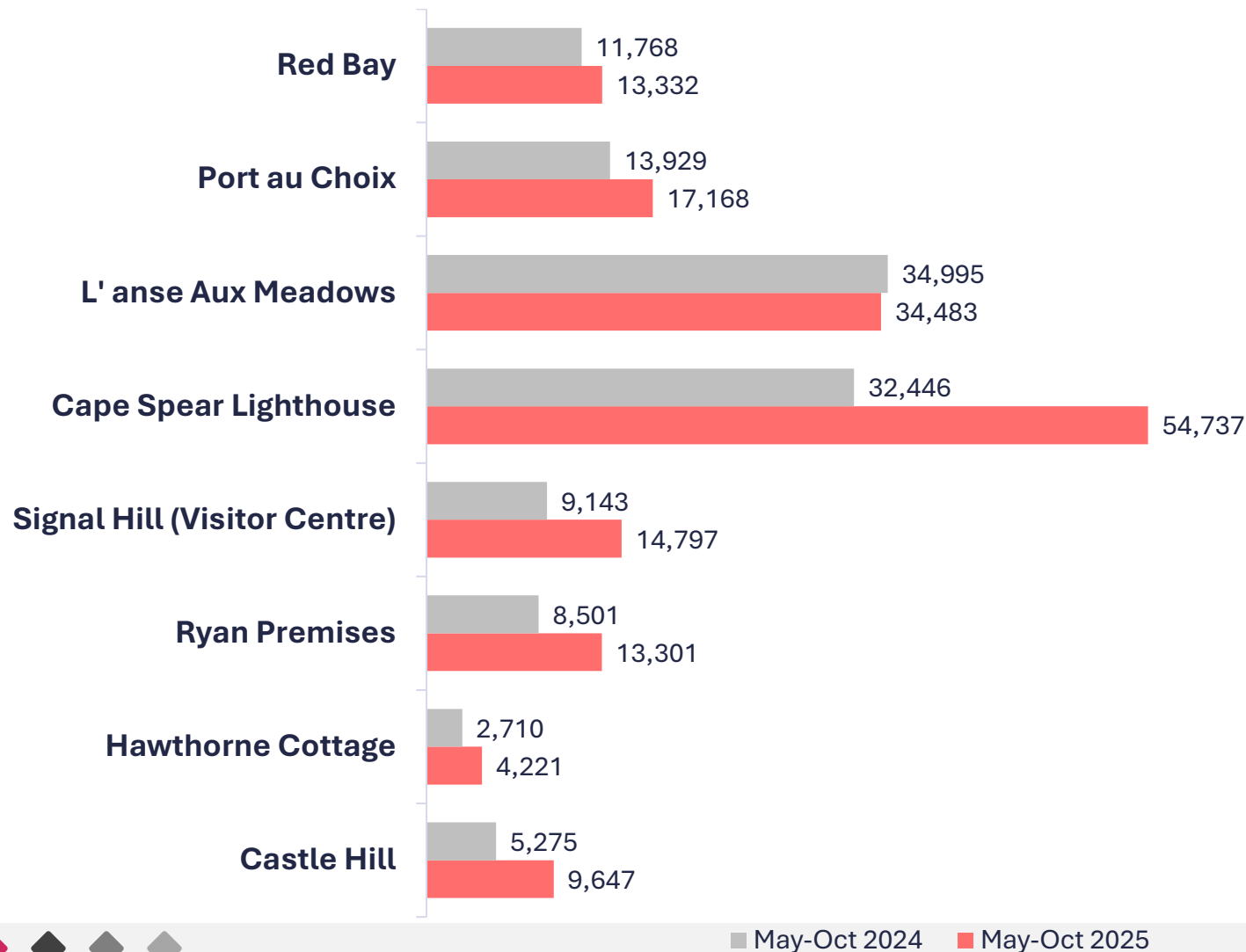
↑

12% from 2024

- **Commissariat House** closed in 2025 for renovations
- **Heart's Content & Cupids Plantation** impacted by summer wildfires in area



NATIONAL HISTORIC SITES (NHS) VISITATION INCREASED **36%** IN 2025 BOOSTED BY CANADA STRONG PASS



161,700
Total visitors
(May-Oct)

National
Historic Sites
Visitation

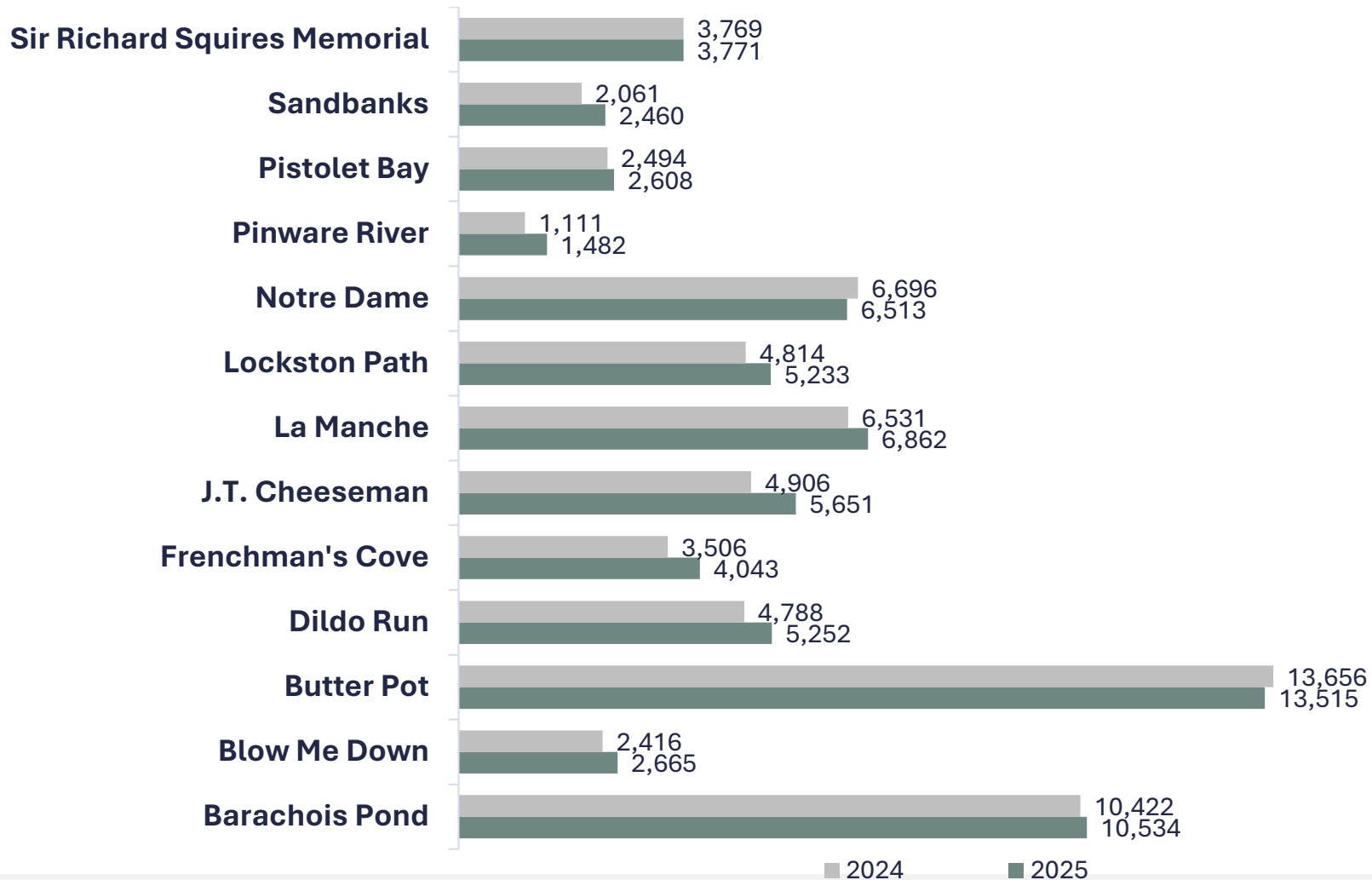
↑ 36% from 2024

- **L'Anse aux Meadows** visitation impacted by cancellation of four cruise ships
- **Gros Morne National Park** attractions & camping activity also up in 2025
- **Western Brook Pond boat tour:** 51,211 visitors; up 19%



RECORD YEAR FOR PARKSNL FOR REVENUE, VISITS, NIGHTS SOLD & OCCUPANCY

ParksNL Nights Sold



Provincial Parks

235,000
Campsite visits

↑ 5% from 2024

Provincial Parks

70,600
Site-nights sold

↑ 5% from 2024

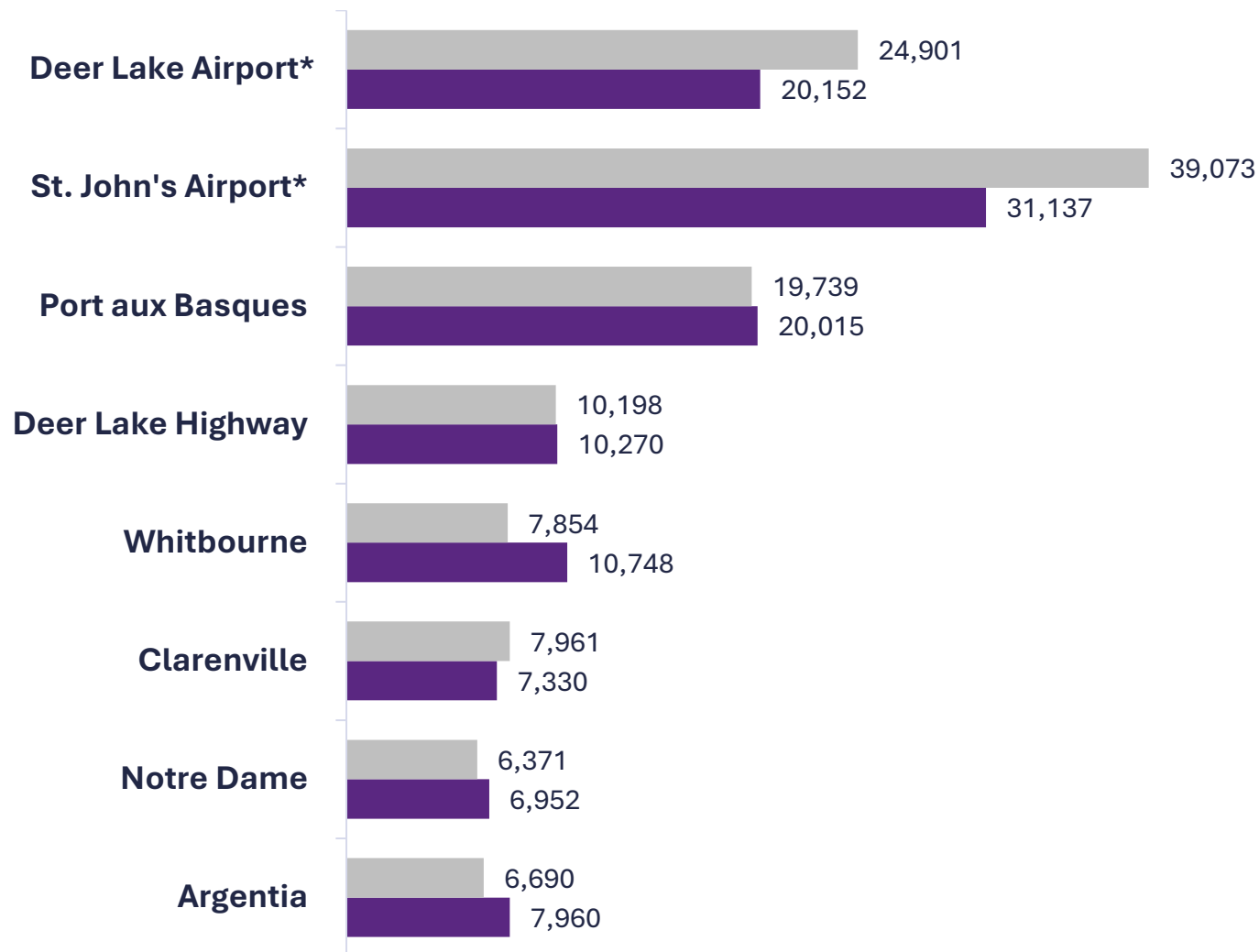
Provincial Parks

\$1.65M
Revenue

↑ 5% from 2024



VISITOR INFORMATION CENTRES (VICS) USAGE DECLINED 7% IN 2025



Provincial Visitor Information Centres

114,600

Total visitors (May-Oct)

↓ 7% from 2024

- Airport VICS saw largest decline in usage
- Gateway VICS at Argentia & Port aux Basques saw increased usage



■ May-Oct 2024 ■ May-Oct 2025

*St. John's & Deer Lake Airport VICS are open year-round, only May-Oct visitation displayed

2025 KEY TAKEAWAYS

2025 marked a strong year for tourism in Newfoundland and Labrador:

- ❖ Air and auto visitor growth reached 4%, outpacing the annual 2% growth target, while total visitor spending topped \$625M
- ❖ Vacation and leisure travel continued to lead growth (+15%)
- ❖ Progress on season extension drove strong increases in spring and fall visitors
- ❖ The accommodations sector saw continued revenue gains, topping \$300 million for the first time
- ❖ Domestic travel fueled growth, with increases from all provinces and strongest growth from Quebec, BC, and the Prairies
- ❖ US visitation softened, likely impacted by Canada–US trade tensions
- ❖ International visitation results were mixed, with growth from France but declines from the UK and Germany
- ❖ Auto and cruise travel remained key growth drivers, while air travel remains weak due to reduced business travel and seat capacity
- ❖ Most sites, parks, and attractions reported increased activity province-wide



BACKGROUND: TOURISM VISITATION & SPENDING 2019, 2024, 2025

Visitors	2019	2024	2025	Year-over-Year Change 2025 / 2024	Year-over-Year Change 2025 / 2019
Non-resident visitors – air	384,300	332,800	338,200	2%	-12%
Non-resident visitors – auto	93,800	110,500	121,500	10%	30%
Sub-total (air & auto)	478,100	443,300	459,700	4%	-4%
Non-resident visitors – cruise	52,400	85,000	72,100	-15%	38%
Total Visitors (air, auto, cruise)	530,500	528,300	531,800	1%	0.2%
Vacation Visitors Only	163,900	175,000	201,100	15%	23%

Visitor Spending (\$M)	2019	2024	2025	Year-over-Year Change 2025 / 2024	Year-over-Year Change 2025 / 2019
Non-resident expenditures – air	\$438.6	\$438.9	\$452.4	3%	3%
Non-resident expenditures – auto	\$106.8	\$148.1	\$165.2	12%	55%
Sub-total (air & auto)	\$545.4	\$587.0	\$617.6	5%	13%
Non-resident expenditures – cruise	\$4.9	\$9.3	\$8.0	-14%	63%
Total Visitors (air, auto, cruise)	\$550.3	\$596.3	\$625.6	5%	14%
Vacation Visitor Spending Only	\$267.2	\$294.2	\$349.1	19%	31%