

Department of Tourism, Culture, Industry and Innovation (TCII)

Year-To-Date (YTD) Tourism Highlights December 2019*

(*Data presented is subject to change, reporting period may vary by indicator)

- The number of non-resident automobile and air visitors travelling to the province reached 478,096 for the period ending December 2019, a decrease of 4.8% compared to 2018 levels.
- The number of non-resident automobile visitors travelling to the province reached 93,818 to the end of December 2019, an increase of 0.6% compared to the same time period of last year.
- The number of non-resident air visitors travelling to the province reached 384,278 for the period ending December 2019, a decline of 6.1% compared to the same time period of last year.
- The provincial accommodations occupancy rate reached 46.4% for the period ending December 2019, an increase of 0.8 points over last year.

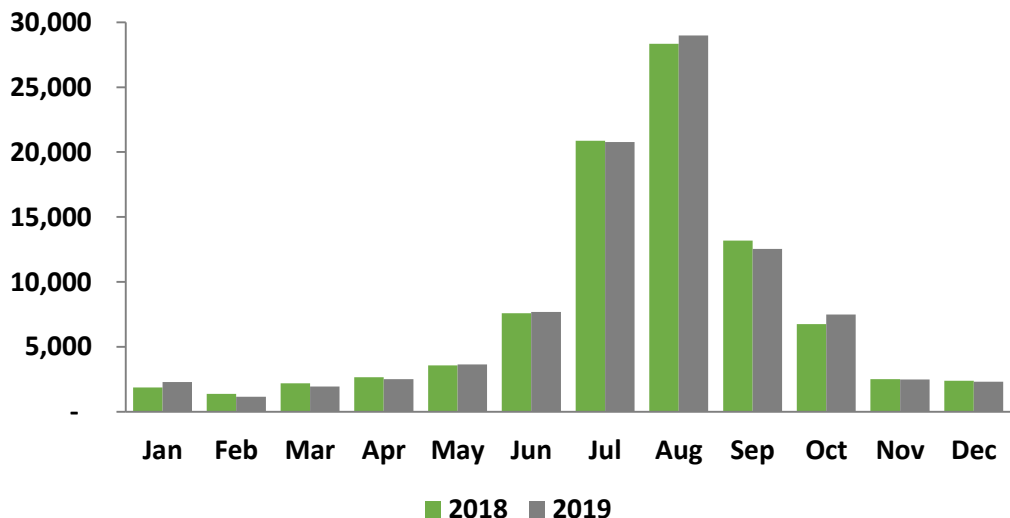
Key Tourism Indicators January to December 2019

Marine Atlantic

- Overall, Marine Atlantic passenger movements (both directions) reached 309,909 to the end of December 2019, on par compared to the same time period last year. Passenger-related vehicle movements increased by 2.9% during the same period to 119,295 vehicles.
- The number of non-resident automobile visitors traveling to the province is estimated to have reached 93,818 to the end of December 2019, an increase of 0.6% over 2018 levels. The number of residents exiting by automobile decreased 1.6% to 59,015 over the same period.



Newfoundland and Labrador Non-resident Automobile Visitors 2018 and 2019

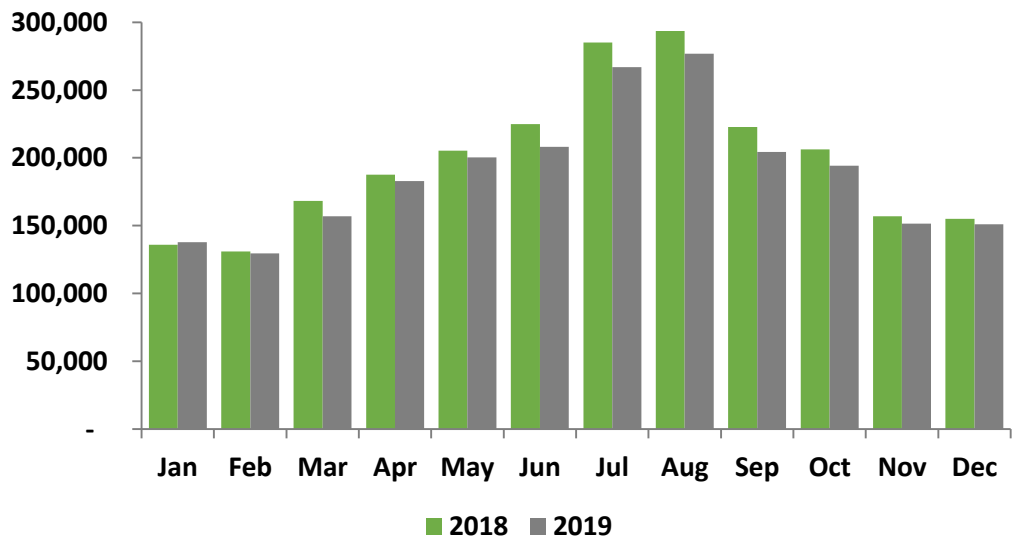


Air Passenger Movements

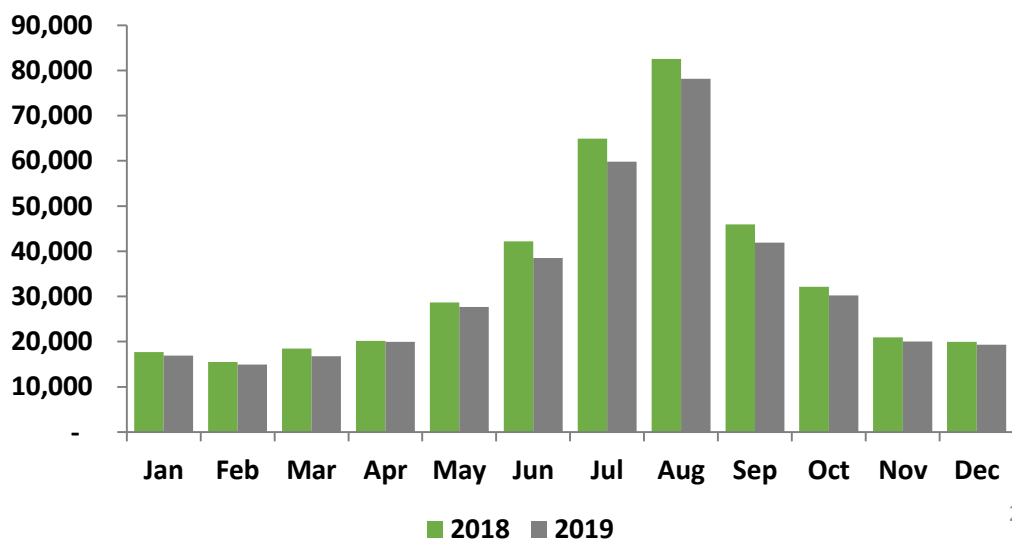
- Airport activity (boarding and deplaning passenger movements) for St. John’s, Gander, Deer Lake, Stephenville, St. Anthony, Goose Bay and Wabush reached 2,260,694 passenger movements for the period ending December 2019, a decrease of 4.7% compared to 2018.
- The number of non-resident air visitors travelling to the province reached an estimated 384,278 for the period ending December 2019, a decline of 6.1% compared to the same period of last year.
- Constraints in airline seat capacity due to the grounding of the Boeing Max8 aircraft have posed a challenge to air travel to this province, with reductions in in-bound non-stop seat capacity (- 8% overall YTD December) and flights (- 16% overall) affecting all major tourism source markets (Halifax, Montreal, Toronto, Calgary) while the St. John’s – Heathrow route has been suspended since April 2019.



Newfoundland and Labrador Airport Passenger Movements 2018 and 2019



Newfoundland and Labrador Non-resident Air Visitors 2018 and 2019

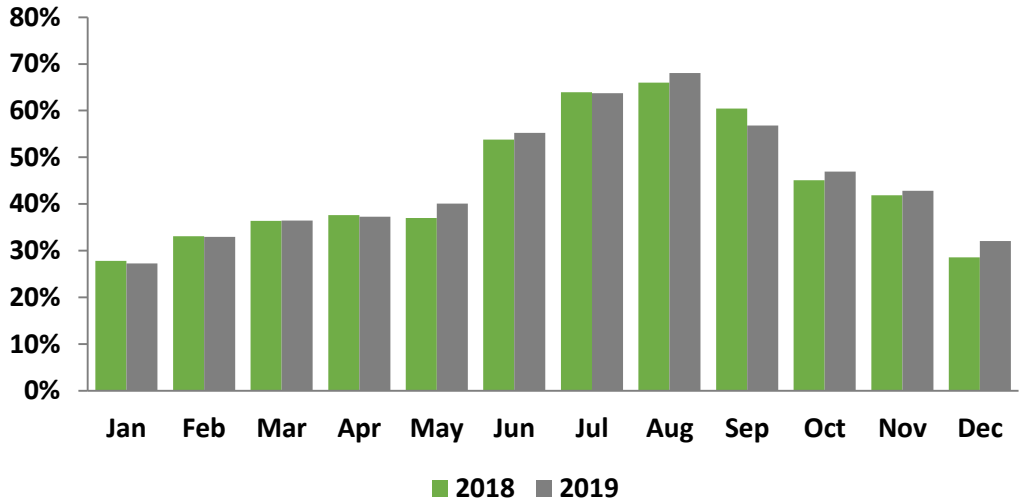


Accommodations

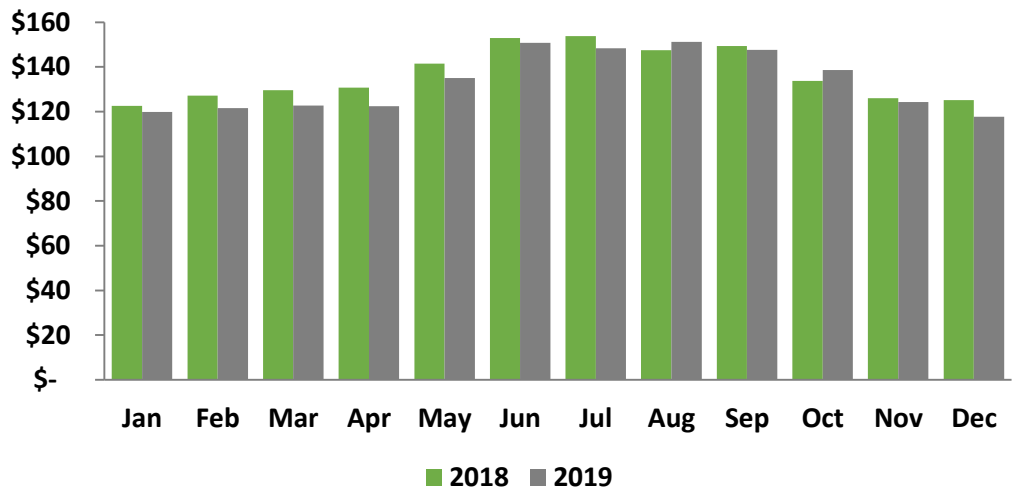
- Accommodation occupancy as available (approximately 96% coverage of all provincially licensed room nights) reached 46.4% for the period ending December 2019, an increase of 0.8 points compared to the same period in 2018.
- The average daily rate as available (approximately 96% coverage of all provincially licensed room nights) reached \$138 for the period ending December 2019, a decrease of 1.7% compared to the same period in 2018.



Newfoundland and Labrador Accommodation Occupancy Rate 2018 and 2019



Newfoundland and Labrador Accommodation Average Daily Rate 2018 and 2019



Background Tourism Performance 2016 – 2018

- The number of non-resident air, automobile and cruise visitors travelling to the province reached an estimated 533,507 in 2018, a decrease of 3.5% compared to 2017. In-province expenditures were estimated to reach \$569.7 million, a decrease of 1% compared to 2017.
- The number of non-resident air visitors travelling to the province reached an estimated 409,047 in 2018, a decrease of 0.9% compared to 2017. In-province expenditures were estimated at \$461.5 million, an increase of 0.7% compared to 2017.
- Non-resident automobile visitation to the province reached an estimated 93,298 visitors in 2018, a decrease of 8.4% compared to 2017. In-province expenditures were estimated at \$105.3 million, a decrease of 0.7% compared to 2017.
- A review of detailed itinerary information provided by the Cruise Association of Newfoundland and Labrador (CANL) indicates that the province received approximately 31,162 unique cruise visitors during the 2018 cruise season, a decrease of 18.7% compared to the previous cruise season. In-province expenditures were estimated at \$2.9 million, a decrease of 17.1% compared to 2017.

2016 – 2018 Non-resident Visitors by Mode of Transportation

Non-resident visitors	2016	2017	2018	Year-over-Year Change 2017-18
Non-resident visitors – air	414,604	412,901	409,047	-0.9%
Non-resident visitors – auto	101,004	101,899	93,298	-8.4%
Sub-total (air & auto)	515,608	514,800	502,345	-2.4%
Non-resident visitors – cruise	23,545	38,321	31,162	-18.7%
Grand Total	539,153	553,121	533,507	-3.5%

2016 – 2018 Non-resident In-Province Expenditures by Mode of Transportation (\$ million)

In-Province Expenditures	2016	2017	2018	Year-over-Year Change 2017-18
Non-resident expenditures – air	\$450.1	\$458.5	\$461.5	0.7%
Non-resident expenditures – auto	\$109.4	\$113.2	\$105.3	-0.7%
Sub-total (air & auto)	\$559.5	\$571.7	\$566.8	-0.9%
Non-resident expenditures – cruise	\$2.1	\$3.5	\$2.9	-17.1%
Grand Total	\$561.6	\$575.2	\$569.7	-1.0%

Key Trends and Impacts on Tourism Activity

Growth in domestic travel slowed in 2018 due to impacts from:

- “Post Canada 150 fatigue” from 2017 as the country was no longer hosting special events and offering free admission in 2018
- A significant increase in travel prices, including significant increases in fuel prices, air transportation, restaurants and accommodation
- Concerns about affordability of travel in light of consumer debt, rising interest rates, weaker wage growth and job prospects
- A weaker economy in the second half of 2018
- A drop in consumer confidence in late 2018 as Canadians began to worry about finances, rising interest rates, household debt, future job prospects, making them more hesitant about spending money on major purchases

Travel to Canada from the US and international markets also slowed in 2018

- Growth in 2018 has generally been more subdued than anticipated in earlier forecasts by the Conference Board and Destination Canada across many markets
- Growth in visitation from the US and overseas markets has moderated over the past couple of years
- US arrivals to Canada grew 7.2% in 2016 and 2.7% in 2017 respectively but only 1.4% in 2018, with auto travel in particular more sensitive to travel price increases
- Overseas arrivals to Canada have also begun to moderate after posting two years of substantial growth in 2016 and 2017, with major markets such as the UK, Australia, Japan and South Korea affected by global political and economic uncertainties

About These Statistics

The Sector Research Division (Tourism), Department of Tourism, Culture, Industry and Innovation 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 Departmental staff that 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/core 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 includes 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 licensed operators).

This can be accessed at http://www.tcii.gov.nl.ca/tourism/tourism_research/stats/index.html

Sector Research Division (Tourism); February 20, 2020

2019 DEPARTMENT OF TOURISM, CULTURE, INDUSTRY AND INNOVATION FLASH SHEET - KEY TRAVEL AND TOURISM INDICATORS YEAR-TO-DATE (YTD)

Indicator	YTD	YTD Change	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Number of Marine Atlantic Crossings (Both Directions) ¹	1,607	-2.7%	98	78	100	110	151	161	202	189	170	143	90	115
Passenger Traffic on Marine Atlantic (Both Directions) ²	309,909	0.5%	7,744	5,812	10,134	14,438	18,366	32,427	68,160	72,429	33,597	23,648	11,350	11,804
Non-Residents Exiting (auto) ³	93,818	0.6%	2,300	1,146	1,937	2,515	3,655	7,685	20,780	28,989	12,532	7,495	2,479	2,305
Residents Exiting (auto) ⁴	59,015	-1.6%	1,920	1,684	3,067	4,611	4,787	6,268	9,668	10,789	5,069	4,884	3,136	3,132
Vehicle Traffic on Marine Atlantic (Both Directions) ⁵	119,295	2.9%	2,481	1,859	3,284	5,233	6,970	12,905	25,712	27,912	14,276	9,897	4,328	4,438
Airport Passenger Movements ⁶	2,260,694	-4.7%	137,723	129,585	156,808	182,977	200,375	208,228	266,779	276,817	204,271	194,293	151,584	151,255
Non-Resident Exiting (air) ⁷	384,278	-6.1%	16,927	14,900	16,737	19,985	27,702	38,521	59,782	78,143	41,933	30,234	20,035	19,380
Roofed Accommodation Occupancy Rates ⁸	46.4%	0.8 points	27.3%	33.0%	36.5%	37.3%	40.1%	55.2%	63.7%	68.1%	56.8%	47.0%	42.9%	32.1%
Roofed Accommodation Average Daily Rate ⁹	\$138	-1.7%	\$120	\$122	\$123	\$122	\$135	\$151	\$148	\$151	\$148	\$139	\$124	\$118
Provincial Museums ¹⁰	90,872	4.52	2,951	5,202	5,236	4,653	6,369	9,613	15,778	14,264	11,643	6,875	5,114	3,174
Provincial Historic Sites ¹¹	105,671	3.0%	CL	CL	CL	CL	3,051	20,001	30,381	29,584	16,941	3,924	1,789	
National Historic Sites ¹²	150,171	50.0%	CL	CL	CL	CL	5,160	30,240	55,097	59,674	n/a	n/a	CL	CL
Provincial Visitor Information Centres (VICs) ¹³	118,979	-3.1%	-	-	-	-	6,002	23,417	35,834	32,858	17,835	3,033	-	-

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, Goose Bay and Wabush)
7. Non-resident air visits: Estimates are based on results from the 2016 Provincial Exit Survey Program and 2019 airport boarding passenger volumes
- 8, 9. Roofed accommodation occupancy and average daily rates: Data is current as of February 20, 2020 and is subject to revisions pending further reporting by the Province's operators.
10. Provincial Museums: The Rooms – January to December; Mary March, Seamen's and Labrador Interpretation Centre – May to October
11. Provincial Historic Sites: operating season to October and Christmas events at Commissariat House and Point Amour Lighthouse in Nov/Dec
12. National Historic Sites: operating season to October. The data excludes Hawthorne Cottage and Cape Spear Lighthouse as these sites were closed in 2018 and 2019 respectively for renovations. Sep/Oct numbers currently not available
13. Visitors to the Provincial VICs cover the period May 17 – October 9