



Department of Tourism, Culture and Recreation Backgrounder Year-End Provincial Tourism Performance 2007 and Early Tourism Outlook 2008

Highlights:

- From January 1, 2007 to December 31, 2007, there were an estimated 490,100 non-resident visits to Newfoundland and Labrador, **a decrease of 1.3%** over the same period in 2006. Non-resident tourism expenditures in the Province from January 1, 2007 to December 31, 2007 were estimated to be \$357.4 million, a decrease of 2.2% over the same period in 2006.

Mode	2005		2006		2007 f	
	Visits	Expenditures \$M	Visits	Expenditures \$M	Visits	Expenditures \$M
Auto	128,500	\$75.9	121,900	\$73.0	127,500	\$76.7
Air	316,100	\$258.9	349,700	\$290.5	333,900	\$278.5
Cruise	25,600	\$1.9	24,800	\$1.9	28,700	\$2.2
Total	470,200	\$336.7	496,400	\$365.4	490,100	\$357.4

Source: Department of Tourism, Culture and Recreation, Strategic Planning and Policy Division
Note: Based on results from the 2003/2004 Newfoundland and Labrador Air and Auto Exit Survey Program and annual Travel Indicator Program. Data subject to revisions.

- The small decline in visitation (-1.3%) experienced during 2007 was in contrast to the growth cycle experienced between 2003 and 2006 (average annual growth over this time period was 4%). The decline in 2007 is attributed to fewer non-resident air visitors which offset the increases recorded in non-resident automobile and cruise visitation.
- Airport passenger movements at the Province's six major airports decreased 0.1% during 2007 to 1.7 million passenger movements. Increases have been recorded for Deer Lake (+18%), Gander (+14%), Wabush (+6%), Goose Bay (+2%) while decreases were recorded at St. John's (-5%) and Stephenville (-17%). Traffic at St. Anthony Airport during 2007 was on par compared to 2006 levels.
- Based on these estimates, non-resident airline visits decreased 4.5% to 333,900 for the period ending December 2007. The decrease in air arrivals has arisen in part because of a decline in air access as measured by the total number of airline seats available in the peaks travel season of

2007. During the summer, domestic access declined compared to the summer of 2006. This, combined with a reduction in the availability of low cost seats on all routes throughout the province, contributed most significantly to the decline in air travel.

- Total Marine Atlantic ferry passenger traffic in 2007 reached approximately 415,700 passengers, an increase of 3% compared with 2006. Non-resident auto visitors increased by 5% for the period January 1, 2007 to December 31, 2007 to approximately 127,500 travellers. Residents exiting the province via Marine Atlantic declined 3% compared to last year.
- As noted the number of non-resident automobile visitors traveling to the province increased 5% over last year's levels. This increase is being driven by more visitors from Ontario (+12%) and to a lesser extent from the Maritimes (+3%) and Western Canada (+6%). Ontario and the Maritimes were the primary target markets for the 2007 advertising campaign. This increase in automobile visitors is the first significant upward trend in this mode of travel since 2002.
- Cruise Newfoundland and Labrador reported 102 port calls during the 2007 cruise season, down from 105 recorded in 2006. Even with the small drop in port calls, passenger and crew visits reached 36,885 and 18,546 respectively, increases of about 8% each over the 2006 cruise season. During the 2007 cruise season, 45 different communities (26 Island portion, 19 Labrador) in the province received at least one port call in 2007, up from 35 different communities (20 Island portion, 15 Labrador) during the 2006 season.
- With larger ships, increased capacity and higher load factors, unique cruise ship visitors (*a count of one regardless of the number of port calls made by the visitor*) during 2007 reached 28,700 an increase of 16% over levels achieved during the 2006 cruise season, The number of unique cruise ship visitors has been trending upwards since 2003.
- Based on available information (93% return rate as of March 12, 2008), 2007 roofed accommodation occupancy rates for the Province increased 4 points over the previous year. Increases were reported in all regions of the province and included Avalon (+4 points), Eastern Region (+4 points), Central (+2 points), Western Region (+4 points) and Labrador (+3 points). These figures will be adjusted as final data for 2007 is received from operators.
- The Department of Tourism, Culture and Recreation received 84,216 inquiries for travel guides and related material (all sources including web, e-mail, telephone and other correspondence) from January 1, 2007 to December 31, 2007, an increase of 27% compared to the same time period in 2006. There were a total of 744,836 visits to the newly re-designed Newfoundland and Labrador Tourism website for the period January 1, 2007 to December 31, 2007, an increase of nearly 88% compared to the same period in 2006.

Comparative Performance

- Canada registered strong domestic demand (as measured by spending) in 2006 increasing 10% over 2005 levels. Despite high gas prices and an exchange rate with favourable conditions for international travel by Canadians, domestic travel continued to perform well in 2007 helping offset declines registered from international markets (-2%) and in particular the United States (-3%) for the period ending December 2007.
- The Conference Board of Canada has attributed the strong performance in domestic travel to a greater focus on marketing Canadian destinations and products by provincial and regional tourism agencies.

- International travel (other than the United States) to Canada increased 3% for the period ending December 2007. Trips increased from the United Kingdom, France and Germany while trips from the Asia region declined.
- Canadian occupancy levels as measured by Pannell Kerr Forster increased less than one point (0.6 points) to 65% for the period ending December 2007 while respective provincial sources indicate a par performance in Nova Scotia, 2 point increases in New Brunswick and Prince Edward Island to a four point increase in Newfoundland and Labrador.
- Overall visitation estimates for each of the Atlantic Canadian Province's are not strictly comparable due to different methodologies. Available data suggests that 2007 performance (visitation) in Nova Scotia, New Brunswick and Prince Edward Island will be 1% to 2% higher than 2006 while total expenditures will remain the same in New Brunswick and increase 2% in Nova Scotia and increase 4% in Prince Edward Island. (See Table II below).

Table II - Visitation and Total Expenditures Other Atlantic Provinces 2005, 2006 and 2007						
Province	2005		2006		2007 f	
	Visits	Expenditures \$M	Visits	Expenditures \$M	Visits	Expenditures \$M
PEI	1,369,000	\$269	1,360,000	\$281	1,375,000	\$294
NS	2,113,000	\$822	2,115,000	\$836	2,157,300	\$851
NB	1,650,000	\$624	1,570,000	\$624	1,601,400	\$624

Source: Province of Nova Scotia, New Brunswick, Prince Edward Island, ACOA/Tourism Atlantic and Department of Tourism, Culture and Recreation calculations.
Note: Data are preliminary estimates only and subject to change at source.

Early Tourism Outlook 2008:

- The Department of TCR is cautiously optimistic about 2008 travel and tourism performance. The Conference Board of Canada is anticipating a modest growth of just over 3% during the first quarter of 2008 despite the high value of the dollar fueling increased international travel.
- Current challenges impacting the travel/tourism industry at both the national and provincial levels include the value of the dollar, fuel costs, the elimination of the Visitors GST/HST Rebate Program, the Western Hemisphere Travel Initiative (WHTI), the Canadian Border Services Agency regulations, Marine Atlantic access/rates and air access and related costs. A slowing of growth in travel volume reflects a plethora of challenges facing the tourism industry especially the slowdown in the United States economy. The online world continues to rapidly evolve.
- The Conference Board of Canada has forecast Newfoundland and Labrador tourism growth at 2.1% for 2008, based on the province's healthy economy, further increases in domestic Canadian travel and increasing awareness of Newfoundland and Labrador as a unique travel destination.
- Healthy economic conditions will continue to support modest growth for the domestic travel market but the high value of the Canadian dollar is expected to fuel an increase in outbound travel demand. The latest Canadian Travel Intentions Survey by the Conference Board of Canada suggests that plans for travel to the United States and other international destinations this winter have increased over 2007 levels, at the expense of domestic travel. The high value of the

Canadian dollar is also hurting the price competitiveness of domestic destinations and the recent rise in gas prices could curb domestic auto travel in the near term.

- The Conference Board of Canada Business Outlook Survey participants expect overall domestic travel will increase 2.6% during the first quarter of 2008 compared with the previous year. Group travel is expected to keep outpacing other market segments, growing 3.2% while fully independent travel should increase 2.4%. Overall leisure travel during the first quarter of 2008 is expected to rise 2.5% with domestic business travel increasing 2.6%.
- The US decision to implement the Western Hemisphere Travel Initiative (WHTI) may impact discretionary travel to Canada. This initiative, effective last January requires travelers crossing border point by air into the U.S., including American citizens returning from Canada must present a passport or air NEXUS card. This requirement will be extended, not later than June 1, 2009, to include travelers crossing at land and marine border points. This easing of regulations may delay the full impact of the WHTI.
- The outlook of US travel to Canada, which accounts for about 12% of the Newfoundland and Labrador market, remains weak largely because of the recent increase in the value of the Canadian dollar. The stronger dollar could have serious consequences for US visits over the short- to medium-term, detracting from Canada's price competitiveness for US travelers. In addition the recent slowdown in the US economy is hurting consumer confidence and eroding travel intentions. Economic growth is expected to remain weak over the next few quarters as the difficulties in the housing market spreads to other sectors of the US economy.
- The Conference Board of Canada Business Outlook Survey participants expect United States travel to Canada will decrease 1.9% during the first quarter of 2008 compared with the previous year. Group travel is expected to fall 2.5% while fully independent travel should decrease 1.9%. Overall leisure travel during the first quarter of 2008 is expected to drop 2% with US business travel to Canada will decline 1%.
- Overall leisure travel from each of the United Kingdom, France and Germany to Canada is expected to increase during the first quarter of 2008 (2.3%, 1.4% and 2.5% respectively). This growth is being supported by increases in air access in France and Germany and to a lesser extent in the UK. Changes to Canada's GST rebate program have increased the cost of travel packages out of Germany.
- Canada's price competitiveness is expected to decline against most competitive destinations in the first quarter of 2008, in large part because of the strong Canadian dollar. The latest competitive price analysis suggest that the overall cost of traveling to Canada will increase substantially, year-over-year, for most markets
- The Meetings, Conventions and Incentive Travel (MC&IT) market in Newfoundland and Labrador remained solid during 2007 with the number of conventions/groups exceeding 50 delegates in the St. John's destination area increasing 29% over 2006 levels. The number of delegates increased 19%. Tentative bookings for 2008 and 2009 suggest growth in this market as bookings to date are outpacing the same time period of 2007.
- Cruise Newfoundland and Labrador has 151 port calls tentatively booked for the 2008 cruise season so far (cited from www.cruisefoundlandandlabrador.com as of March 24, 2008). If this level is achieved it would exceed 2007 performance by 49 port calls and passenger visits would increase by 20% to approximately 44,000.
- Early indications are that air capacity to Newfoundland and Labrador is improving in 2008 and this will be closely monitored by the Department of Tourism, Culture and Recreation.

- Tourism inquiries and web site visits continue to be robust during the early part of 2008 as inquiries and web site visits to the end of January are up 15% and 22% respectively compared to the same time period of 2007.
- In 2007, the Department of Tourism, Culture and Recreation's provincial tourism marketing efforts received significant industry recognition including Winner of the TIAC Marketing Campaign of the Year, Finalist for the Canadian E-Tourism Awards Best Website Public Sector, Winner of *Progress Magazine* Marketer of the Year and Winner of two Gold, five Silver and three Merit awards at the Innovation, Creativity and Entrepreneurism (ICE) Awards which honour Atlantic Canada's Advertising and Marketing Talent.
- The Department of TCR is further enhancing its leading website in 2007 and implementing the Internet Marketing Strategy in order to keep pace with changing consumer engagement and building customer relationships through the Internet. These are in addition to an increased tourism marketing budget, targeted product development initiatives (including season extension), new strategies in cultural tourism, intangible cultural heritage, outfitting, winter tourism and a new Provincial Tourism Vision and Plan expected in early 2008.
- There is increased competition in current markets, especially from low-cost, emerging international destinations in Southeast Asia (India, China, Thailand) and the Middle East. Newfoundland and Labrador, like most provinces, is also facing challenges in labour supply and training in the tourism industry through labour shifts in primary industry and the migration of residents in search of work.
- Significant infrastructure investment in tourism, culture and hospitality will enhance attractions and provide ongoing platforms for innovative and expanded product development in 2008 and beyond. In addition, provincial infrastructure priorities in upgrading the provincial highway system and improving highway signage will enhance intra-provincial access and the core sightseeing/explorer experience. The Department of TCR is also working with the Department of Transportation and Works to develop a provincial air transportation strategy, improved highway signage and to address fleet capacity, fleet configuration, rates and service quality issues with Marine Atlantic.
- Looking ahead to 2009 and 2010, the Province also will be celebrating several notable historic milestones including: the 60th Anniversary of Confederation with Canada (to be marked mainly with the restoration of the Colonial Building) and the Life and Voyages of Captain Robert (Bob) Bartlett of Brigus, both in 2009; and the 400th Anniversary of the founding of Cupers Cove Colony (Cupids) in 2010. Event plans are in process and the Provincial Government is seeking federal partnership on these initiatives.

Table III (below) provides an at-a-glance summary of key indicators of provincial tourism performance for 2007.

Appendix 1 contains a detailed listing of all available Newfoundland and Labrador travel and tourism indicators.

TABLE III: KEY PROVINCIAL TRAVEL AND TOURISM INDICATORS AT A GLANCE TO DECEMBER 2007			
#	Key Travel/Tourism Indicator	% Increase Compared to the Same Time Period of 2006	% Decrease Compared to the Same Time Period of 2006
1	Passenger Traffic on Marine Atlantic	+3%	
2	Non-Residents Exiting (auto)	+5%	
3	Residents Exiting (auto)		-3%
4	Vehicle Traffic on Marine Atlantic	+5%	
5	Exiting Buses		-9%
6	Airport Passenger Movements		-0.1%
7	Non-Residents Exiting (air)		-5%
8	# of Total Port Calls		-3%
9	Cruise Ship Passenger Movements	+8%	
10	Unique Cruise Ship Passengers	+16%	
11	Roofed Accommodation Occupancy Rates	+4 Points	
12	Provincial Visitor Information Centres		-6%
13	Meetings and Conventions (St. John's)	+29%	
14	Convention Delegates (St. John's)	+19%	
15	Convention Room Nights (St. John's)	+13%	
16	Unique Inquirers	+27%	
17	Website Visits	+88%	

Source: Department of Tourism, Culture and Recreation, Strategic Planning and Policy Division.

Notes:

1. Passengers carried by Marine Atlantic covers the period January to December.
2. Non-resident Auto visits cover the period January to December.
3. Residents exiting by Automobile cover the period January to December. While shown in the debit column, a decrease in residents means fewer leaving the province by automobile to travel to destinations outside the province. This has not necessarily translated into greater in-province travel by residents who have also been impacted by the price of fuel.
4. Passenger related traffic carried by Marine Atlantic covers the period January to December.
5. The number of exiting buses covers the period May to October.
6. Airport passenger movements at the province's seven major airports cover the period January to December.
7. Non-resident air visitors cover the period January to December.
- 8, 9, 10. The number of cruise ship port calls and associated passengers covers the cruise season.
11. Roofed accommodation occupancy levels cover the period January to December. Data is current as of March 12, 2008 and is subject to revisions pending further reporting by the Province's operators. Increase or decrease is presented as % point change.
12. Visitors to the system of Provincial VIC'S covers the period May to September/October
- 13, 14, 15 As reported by Destination St. John's for groups of +50 or more delegates.
- 16, 17 Tourism Marketing Division. Data is for January to December

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Detailed 2007 Travel/Tourism Indicators
Newfoundland and Labrador

Strategic Planning and Policy Division
Department of Tourism, Culture and Recreation

As of March 12, 2008

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Note bene: The following travel and tourism indicators are for the 2007 operating season. Comparisons are to the same time period of 2006.

Marine Atlantic

- Overall passenger traffic on the Marine Atlantic Ferry System increased 3% during 2007 while passenger related vehicle traffic on the Marine Atlantic Ferry System increased 5%.
- It is estimated that non-resident automobile visits increased 5% covering the period January to December. Traffic from the Maritimes increased 3% while the number of visitors from Ontario increased 12%. Visitors from Quebec decreased 5% compared to last year while the number of visitors reported from the USA declined 2%. Automobile visitors from Western Canada increased 6% during 2007. The Maritimes and Ontario were the primary target markets for the 2007 advertising campaign.
- Residents travelling outside the province via Marine Atlantic decreased 3% during 2007.
- Exiting bus traffic on the Marine Atlantic Ferry System decreased 9% between May and October 2007 (- 15 buses).

Airports

- Airport passenger movements at the Province's six major airports decreased 0.1% during 2007 to 1.7 million passenger movements. Increases have been recorded for Deer Lake (+18%), Gander (+14%), Wabush (+6%), Goose Bay (+2%) while decreases were recorded at St. John's (-5%) and Stephenville (-17%). Traffic at St. Anthony Airport during 2007 was on par compared to 2006 levels.
- Based on these estimates, non-resident airline visits decreased 5% for the period ending December 2007.

Accommodation Occupancy Rates

- Based on available information (93% return rate as of March 12, 2008), 2007 roofed accommodation occupancy rates for the Province increased 4 points over the previous year. Increases were reported in all regions of the province and included Avalon (+4 points), Eastern Region (+4 points), Central (+2 points), Western Region (+4 points) and Labrador (+3 points). These figures will be adjusted as final data for 2007 is received from operators
- Based on available information (86% return rate of March 12, 2008), preliminary commercial campground occupancy rates for May to October 2007 decreased less than 1 point (-0.4 points) over 2006 levels. These figures will be adjusted as final data for 2007 is received from operators.

Cruise

- Cruise ship passenger visits reached 36,885 during the 2007 cruise season, an increase of 8% over the 2006 cruise season. A total of 102 port calls were recorded during 2007, down from the 105 recorded during the 2006 cruise season.
- A review of detailed cruise itinerary information shows the province received 28,700 unique cruise visitors (a count of one regardless of the number of port calls made by the visitors), an increase of 16% over the previous year.

Meetings, Conventions, Incentive Travel (MCIT) and Events

- The number of meetings and conventions events (50 or more delegates) reported by Destination St. increased over last year. Specifically Destination St. John's reported 99 meetings and conventions accounting for 22,600 delegates and 45,856 room nights, increases of 29%, 19% and 13% respectively over 2006.

Visitor Information Centres

- The number of visitors to the system of Provincial visitor information centres between May and September/October 2007 declined 6% over the 2006 operating seasons. Increases in visitation were reported at Deer Lake (+14%), Notre Dame Junction (+13%), Clarendville (+3%), Whitbourne (+2%) and Argenticia (+13%) while decreases were reported at North Sydney (-26%) and Port Aux Basques (-22%). Renovations at the centre in Port Aux Basques contributed to the decline in visits during 2007.
- Visitor information services at the Gentara Building (Water Street) operated by the City of St. John's received 13,965 visitors between June and September 2007, an increase of 27% compared to 2006 levels. Non-resident visits increased 26% while resident visits increased 29%.

Provincial Parks and Reserves

- During the 2007 operating season there were 49,766 camping units registered at the system of Provincial Parks.
- A change in the reservation system may have accounted for a portion of the decline recorded in 2007. In 2007, the system of provincial parks introduced a new comprehensive reservation system. Under the previous system, resident campers, for example, would book from mid-week to the end of the week to ensure that they could "hold" their weekend reservation. These reservations would be counted as occupied sites for the full booking period whether they came at the beginning of the mid-week or for the weekend only.
- With the new reservation system, campers would reserve only the nights (weekends included) that they planned to occupy the site and thus did not extend the booking just to "hold" the site. A four night booking in 2006 could only be registered as a two night booking in 2007.
- Other factors have affected Provincial Park use over the last few years including the number, party composition, accommodation preferences, travel patterns and other changing characteristics of resident travelers in particular who account for 90% of overnight stays in provincial parks. Other factors affecting visitation include gas prices and weather.
- Cape St. Mary's and Burnt Cape Ecological Reserves reported mixed performance during the 2007 operating season (May 1 to October 15). Specifically Cape St. Mary's increased almost 50% to 25,965 visitors while only 655 visitors were reported for Burnt Cape, a decrease of 26%.

Salmonier Nature Park

- Approximately 33,600 people visited Salmonier Nature Park between June and October 2007, an increase of 2% over the 2006 operating season. General visitation and group visits increased during 2007 while the number of visitors associated with school visits decreased.

System of Provincial Historic Sites

- The system of Provincial Historic Sites (PHS) received 70,858 visitors between May and September 2007, an increase of 10% over the same time period of last year. Despite this overall increase in visitation, five of the 10 Provincial Historic Sites reported declines during the 2007 operating season.

- Increases were reported at the Bonavista Lighthouse, Point Amour Lighthouse, Quidi Vidi Battery, Mockbeggar Plantation and Hiscock House while declines were reported at Heart's Content cable Station, Ryan Shop Mercantile Building, Trinity Interpretation Centre, Commissariat House and Boyd's Cove.
- Bus tour and other group visits reached 378 groups between May and September 2007, a drop of 24 groups or 6 lower than the same time period of last year.

System of Regional Provincial Museums

- The Provincial System of Regional Museums reported increases during the 2007 operating season. Specifically the Seamen's Museum on the Burin Peninsula reported 4,734 visits, an increase of 10% over the 2006 operating season. Visitation levels to the Logger's Exhibit and Mary March Museum increased 1% and 3% respectively to 3,237 and 6,402 visitors.
- Approximately 4,400 visitors were reported at the Labrador Interpretation Centre during the 2007 operating season, an increase of 41% compared to 2006.

System of National Historic Sites

- Five of the six reporting National Historic sites reported a decline in the number of visitors during the 2007 operating season. Data for both Signal Hill (Cabot Tower) and Cape Spear (Visitor Centre) were unavailable.
- Two of the three National Historic Sites in the Western Region and the Labrador Straits area reported declines during 2007. Specifically, L' Anse aux Meadows, the only site to record an increase in visitation, reported 27,819 visitors for the 2007 operating season, an increase of 2% over 2006. The number of visitors to Red Bay for the 2007 operating season declined 6% to 7,977 while the number of visitors to Port Au Choix National Historic Site decreased 3% to 9,212 visitors.
- The Ryan Premises on the Bonavista Peninsula reported 6,895 visitors during the 2007 operating season, a decrease of 6% over the 2006 season.
- Visitation to Castle Hill and Hawthorne Cottage (both on the Avalon Peninsula) also reported lower visitation levels for the 2007 operating season. Specifically, Castle Hill received 10,324 visitors for the 2007 operating season, a decrease of 9% over 2006 while Hawthorne Cottage decreased 4% to 3,745 visitors.

Terra Nova National Park

- Camper nights in the two campgrounds within Terra Nova National Park reached 12,907 for the 2007 camping season ending August, an increase of 775 camper nights or 6% higher than last year.
- Bus tours activity at Terra Nova during the 2007 season ending August was mixed compared to 2006 levels. Specifically Terra Nova received 96 bus tours down 1 bus tour compared to last year however the number of passenger carried on the buses decreased 7% to 3,094 passengers.
- Visitation to the Visitor Information Marine Centre decreased 27% to 7,136 for the period ending August.

Gros Morne National Park

- Camper nights in the five campgrounds within Gros Morne National Park reached 9,754 for the 2007 camping season ending October, a decline of 276 camper nights or 3% lower than the last year.

- The number of bus tours visiting Gros Morne increased during 2007 season ending October. Specifically Gros Morne received 301 bus tours, an increase of 29% over 2006 levels. Passenger carried on the tour buses reached 10,012 an increase of 35% over the previous year.
- Western Brook Pond and Trout River Pond Boat tours also reported higher numbers during the 2007 season ending October as approximately 28,178 people reported using the boat tours, an increase of 3% over last year.
- Visitation ending October 2007 to the Discovery Centre, Visitor Centre, Lobster Cove Lighthouse and Broom Point was mixed compared to 2006 levels. The number of visitors to the Discovery Centre increased 14% to 27,496 while the number of visitors at Broom Point increased 1% to 7,917. The number of visitors reported at the Lobster Cove Lighthouse declined 8% to 16,404 while the number of visitors to the Visitor Centre was on par with 2006 levels.

Colony of Avalon (Ferryland)

- The number of visitors between May and October reached 20,569, an increase of 10% over the same time period of 2006.

Cupids Museum

- The number of visitors reported at the Cupids Museum reached 2,431 during the 2007 operating season, a decrease of 16% over the same time period of 2006.

Labrador Straits Ferry

- Overall traffic carried on the ferry between St. Barbe and Blanc Sablon (both directions) increased for the operating period May to October 2007 however the number of tour buses declined. Specifically passenger traffic increased 1% to 63,420 people while general vehicle traffic increased 4% to 22,852 for the same time period. The number of tour buses carried on the Straits ferry declined 4% to 156.

Labrador West

- Approximately 534 people signed the guest book at the Labrador West Visitor Information Centre between June and September 2007, a decline of -46% over 2006 levels. It should be noted that not everyone signs the guest registration at the information centre.
- The number of motorcoach groups and associated passengers increased compared to last season. Specifically Labrador West received 12 motorcoach groups with 477 passengers. The number of groups increased 33% over last year (+3 groups) however with the decline in the average number of people in each groups, passenger volumes only increased 7% (+32 passengers).

Arrivals from St. Pierre and Miquelon (SPM)

- Direct arrivals at the St. John's airport by residents of SPM reached 4,164 for the period January to December 2007, an increase of 1% over the same time period of 2006.
- Direct arrivals at Fortune by residents of SPM reached 3,739 for the period May to October 2007, a decrease of 3% over the same time period of 2006.

Tables 1-25 with detailed travel and tourism indicators follow below.

Marine Atlantic Traffic	Port Aux Basques to North Sydney, NS Service			Argentia to North Sydney, NS Service			Total Newfoundland to Nova Scotia Service		
	2006	2007	% Change	2006	2007	% Change	2006	2007	% Change
Passengers Carried	372,187	380,966	2.4	33,149	34,686	4.6	405,336	415,652	2.5
Passenger Related Vehicles Carried (PRV'S)	122,046	127,683	4.6	13,092	13,591	3.8	135,138	141,274	4.5
# of Crossings	2,086	2,100	0.7	80	79	-1.3	2,166	2,179	0.6

Source: Marine Atlantic Traffic Reports
Note: The Port Aux Basques to North Sydney service operates year round while the Argentia to North Sydney service operated between June and September.

Origin	2006	2007	% Change
Maritimes	55,939	57,591	3.0
Ontario	33,264	37,296	12.1
Quebec	7,638	7,271	-4.8
Western Canada	8,840	9,408	6.4
United States	15,978	15,644	-2.1
Foreign	201	179	-10.9
Province	121,864	127,497	4.6

Source: Marine Atlantic Traffic Reports and CFIA
Note: Categories may not add to the total because of rounding.

Origin	2006	2007	% Change
Newfoundland & Labrador	78,718	76,634	-2.7

Source: Marine Atlantic Traffic Reports and CFIA

Table 4. Airport Passenger Movements: January to December 2006 and 2007			
Airport	2006	2007	% Change
St. John's	1,243,002	1,185,302	-4.6
Gander	63,527	72,630	14.3
Deer Lake	235,286	278,532	18.4
Stephenville	14,715	12,277	-16.6
St. Anthony	21,141	21,134	0.0
Goose Bay	94,422	95,921	1.6
Wabush	67,180	71,344	6.2
Province	1,739,273	1,737,140	-0.1
Source: Airport Managers, Transport Canada			

Table 5. System of Regional Museums: Operating Season 2006 and 2007			
Museum	2006	2007	% Change
Mary March Museum	6,221	6,402	2.9
Seamen's Museum	4,295	4,734	10.2
Logging Museum	3,215	3,237	0.7
Overall	13,731	14,373	4.7
Source: Heritage Division, Department of Tourism, Culture & Recreation.			
Notes: Data presented for Mary March Museum covers the period May to October. Data presented for the Seamen's Museum covers the period May to October. Data presented for the Logging Museum covers the period May to September.			

Table 6. *Occupancy & *Average Daily Rates by Region: January to December 2006 and 2007

**Change in Occupancy presented as % point Change while*

**Change in Average Daily Rate is presented as % Change*

	2006	2007	Change
Province			
Occupancy Rate	44.2	48.0	3.8
Average Daily Rate	\$98.58	\$101.31	2.8
Avalon Peninsula			
Occupancy Rate	53.5	57.7	4.2
Average Daily Rate	\$112.24	\$113.16	0.8
Eastern Region			
Occupancy Rate	36.3	40.4	4.1
Average Daily Rate	\$95.17	\$100.17	5.3
Central Region			
Occupancy Rate	37.0	39.4	2.4
Average Daily Rate	\$80.29	\$84.41	5.1
Western Region			
Occupancy Rate	37.9	41.5	3.6
Average Daily Rate	\$87.22	\$89.19	2.3
Labrador			
Occupancy Rate	41.9	45.3	3.4
Average Daily Rate	\$84.33	\$91.02	7.9
<p>Source: Accommodation Module, Tourism Destination Management System (TDMS II) Notes: Data presented is current as of March 12, 2008 and is subject to revision pending receipt of further data from the province's operators. Occupancy and average daily rate data should be considered as preliminary/estimates and is based on the sample (properties) reporting.</p>			

Table 7. Skier Visits: Operating Season Marble Mountain 2005/06 and 2006/07

	2005/2006	2006/2007	% Change
Skier Visits	80,734	88,152	9.2
Source: Marble Mountain Development Corporation			

Table 8. Passenger Arrivals (Fortune Ferry Terminal): May to October 2006 and 2007

Origin	2006	2007	% Change
Returning Residents	3,045	2,823	-7.3
St. Pierre & Miquelon	3,862	3,739	-3.2
Other Canadians	4,063	3,417	-15.9
United States	382	378	-1.0
Other Countries	206	159	-22.8
Overall	11,558	10,516	-9.0

Source: Customs & Excise, Revenue Canada (Fortune Office).

Table 9. Exiting Bus Traffic via Marine Atlantic: May to October 2006 and 2007

	2006	2007	% Change
Number of Exiting Buses	173	158	-8.7

Source: Marine Atlantic Traffic Reports.

Table 10 (a). Provincial Chalet Visits: Operating Season 2006 & 2007

Provincial Chalet	2006 Season	2007 Season
Port Aux Basques	22,611	17,293
Deer Lake	17,796	20,271
Deer Lake (Airport)	Not Open	11,707
Notre Dame Junction	9,280	10,506
Clareville	8,562	8,817
Whitbourne	11,462	11,706
Argentina	6,746	7,635
North Sydney, NS	22,802	16,970
Total	99,259	104,905

Source: Strategic Tourism Product Development Division, Department of Tourism, Culture & Recreation

Notes: The 2006 operating season included May 8 to November 15 for Port Aux Basques, May 8 to November 15 for Deer Lake, May 8 to October 31 for North Sydney, Notre Dame Junction and Whitbourne, May 8 to October 31 for Clareville and May 8 to October 10 for Argentina. The 2007 operating season included May 7 to November 15 for Port Aux Basques and Deer Lake, June 11 to November 15 for Deer Lake (Airport), May 7 to October 30 for Notre Dame Junction, May 7 to October 32 for Clareville, Whitbourne and North Sydney and May 7 to October 10 for Argentina. The chalet statistics do not include telephone calls to the various centres.

Table 10 (b). Provincial Chalet Visits: May to September/October 2006 & 2007

Provincial Chalet	2006	2007	% Change
Port Aux Basques	21,953	17,149	-21.9
Deer Lake	17,732	20,159	13.7
Notre Dame Junction	9,272	10,498	13.2
Clarenville	8,562	8,805	2.8
Whitbourne	11,462	11,695	2.0
Argentia	6,746	7,631	13.1
North Sydney, NS	22,802	16,959	-25.6
Total	98,529	92,896	-5.7

Source: Strategic Tourism Product Development Division, Department of Tourism, Culture & Recreation

Note: Because of the difference in operating seasons between 2005 and 2006 as described in Table 10 (a) notes, this table selects a common interval in order to compare performance.

Table 11(a). Provincial Historic Site Visits: Operating Season 2006 and 2007

Provincial Chalet	2006 Season	2007 Season
Cape Bonavista Lighthouse	23,851	30,370
Heart's Content Cable Station	5,548	5,600
Ryan Shop Mercantile Building	4,255	4,155
Point Amour Lighthouse	5,409	5,842
Trinity Interpretation Centre	4,626	4,469
Quidi Vidi Battery	3,873	2,590
Mockbeggar Plantation	4,549	4,697
Hiscock House	3,710	3,787
Commissariat House	2,872	2,072
Boyd's Cove	9,140	9,394
Province	67,833	72,976

Source: Heritage Division, Department of Tourism, Culture & Recreation

Notes: The 2006 operating season for Cape Bonavista Lighthouse, Ryan Shop Mercantile Building, Trinity Interpretation Centre, Mockbeggar Plantation and Hiscock House covers the period May 20 to October 29, 2006. The operating season for all other sites is May 20 to September 29, 2006. Statistics for Commissariat House do not include the 781 people visiting under the "Doors Open" program on September 9th and 10th. The 2007 operating season Cape Bonavista Lighthouse, Ryan Shop Mercantile Building, Trinity Interpretation Centre, Mockbeggar Plantation and Hiscock House covers the period May 19 to October 12, 2007. The operating season for all other sites is May 19 to September 28, 2006. Heart's Content and Boyd's Cove received some visitors during the first week of October.

Table 11(b). Provincial Historic Site Visits: May to September 2006 and 2007			
Historic Site	2006	2007	% Change
Cape Bonavista Lighthouse	23,286	29,838	33.9
Heart's Content Cable Station	5,548	5,473	-1.4
Ryan Shop Mercantile Building	4,198	4,124	-1.8
Point Amour Lighthouse	5,409	5,842	8.0
Trinity Interpretation Centre	4,587	4,430	-3.4
Quidi Vidi Battery (August Only)	1,431	1,471	2.8
Mockbeggar Plantation	4,442	4,549	2.4
Hiscock House	3,674	3,756	2.2
Commissariat House	2,872	2,072	-27.9
Boyd's Cove	9,136	9,303	-1.2
Province	64,583	70,858	9.7
Source: Heritage Division, Department of Tourism, Culture & Recreation			
Notes: Because of the difference in operating seasons between 2005 and 2006 as described in Table 11 (a) notes, this table selects a common interval in order to compare performance.			

Table 12. Terra Nova National Park Visitation (Operating Season to August) 2006 and 2007			
Terra Nova Park	2006	2007	% Change
Camper Nights	12,132	12,907	6.0
Marine Centre	9,100	7,136	-27.5
Motorcoach Visits	97	96	-1.0
Motorcoach Passengers	3,308	3,094	-6.9
Source: Parks Canada, Terra Nova National Park			

Table 13. Gros Morne National Park Visitation: (Operating Season to October) 2006 and 2007			
Gros Morne Park	2006	2007	% Change
# of Visitors (June to October)	156,776	159,138	1.5
Camper Nights	10,030	9,754	-2.8
Visitors (Discovery Centre)	24,120	27,496	14.0
Visitors (Visitor Centre)	42,453	42,425	-0.1
Visitors (Lighthouse)	17,910	16,404	-8.4
Visitors (Broom Point)	6,943	7,017	1.1
Motorcoach Visits	233	301	29.2
Motorcoach Passengers	7,412	10,012	35.1
Boat Tours (People)	27,419	28,178	2.8
Interpretation Programs	7,512	8,198	9.1
Source: Parks Canada, Gros Morne National Park			

Table 14. National Historic Sites: (Operating Season) 2006 and 2007			
Historic Site	2006	2007	% Change
L'Anse Aux Meadows	27,378	27,819	1.6
Port Au Choix	9,492	9,212	-2.9
Red Bay	8,462	7,977	-5.7
Castle Hill	11,308	10,324	-8.7
Ryan Premises	7,335	6,895	-6.0
Hawthorne Cottage	3,909	3,745	-4.2
Signal Hill (Cabot Tower)	45,548		
Cape Spear (Visitor Centre)	23,374		
Source: Parks Canada, L'Anse Aux Meadows, Port Au Choix, Red Bay, Castle Hill, Hawthorne Cottage, Ryan Premises, Signal Hill and Cape Spear National Historic Sites.			
Notes: Data presented for Signal Hill Cabot Tower covers the period May to October; Data presented for Cape Spear Visitor Centre covers the period May to September; Data presented for Hawthorne Cottage covers the period May to September; Data presented for Red Bay covers the period June to October; Data presented for Port au Choix covers the period June to October; Data presented for Ryan Premises covers the period May to October; Data presented for L'Anse Aux Meadows covers the period June to October. Data presented for Castle Hill covers the period May to October.			

Table 15. Provincial Parks: Camping Units Registered (Operating Season) 2006 and 2007

Provincial Park	2006	2007
Barachois Pond	8,381	6,934
Blow Me Down	899	956
J. T. Cheeseman	1,608	1,668
Pinware River	438	460
Pistolet Bay	1,269	1,489
Sandbanks	1,283	1,059
Squires Memorial	3,189	3,617
Western & Labrador Straits Region	17,067	16,183
Dildo Run	2,800	2,649
Notre Dame	7,442	6,062
Central Region	10,242	8,711
Frenchman's Cove	2,076	1,961
Lockston Path	3,647	3,418
Eastern Region	5,723	5,379
Butter Pot	16,988	14,044
La Manche	6,947	5,449
Avalon Region	23,935	19,493
Province	56,967	49,766

Source: Parks & Natural Areas Division, Department of Environment and Conservation.

Notes: There are seven parks located in the Western & Labrador region including Barachois Pond, Blow Me Down, J.T. Cheeseman, Pistolet Bay, Sandbanks, Squires Memorial and Pinware River (Labrador Straits). The two parks located in the Central region include Dildo Run and Notre Dame while the Eastern region parks are Frenchman's Cove and Lockston Path. The two parks located on the Avalon Peninsula include Butter Pot and La Manche.

Table 16. Cape St. Mary's and Burnt Cape Ecological Reserve: (May 1 to October 15) 2006 and 2007

	2006	2007	% Change
Number of Visitors Cape St. Mary's	17,371	25,965	49.5
Number of Visitors Burnt Cape	887	655	-26.2

Source: Parks & Natural Areas Division, Department of Environment and Conservation.

Table 17. Salmonier Nature Park: June to October 2006 and 2007			
Visitors	2006	2007	% Change
General Visitation	26,387	n/a	n/a
Group Visits	3,077	n/a	n/a
Subtotal	29,464	30,535	3.6
School Visits/Groups	2,516	2,057	-18.2
# of Visitors (Total)	31,980	32,592	1.9
Source: Salmonier Nature Park, Inland Fish and Wildlife Division, Department of Environment and Conservation			

Table 18. Colony of Avalon (Ferryland): May to October 2006 and 2007			
Visitors	2006	2007	% Change
# of Visitors	18,650	20,569	10.3
Source: Colony of Avalon Foundation (Ferryland)			

Table 19. Cupids Museum: (Operating Season) 2006 and 2007			
Visitors	2006	2007	% Change
# of Visitors	2,897	2,431	-16.1
Source: Cupids Museum			

Table 20. Gentara Building Visitors Information Centre (St. John's): June to September 2006 and 2007			
Visitors	2006	2007	% Change
St. John's Residents	1,455	1,923	32.2
Other Residents of the Province	227	248	9.3
Residents (Total)	1,682	2,171	29.1
Non-Residents	9,340	11,794	26.3
Total	11,022	13,965	26.7
Source: City of St. John's			

Table 21. City of Corner Brook Selected Indicators: 2006 and 2007			
	2006	2007	% Change
Motorcoach Visits	158		
Motorcoach Passengers	6,004		
Meetings and Conventions (Groups)	48		
Meetings and Conventions (Delegates)	7,006		
Visitor Centre (Visitors)	10,426		
Source: City of Corner Brook.			

Table 22. MCIT and Event Statistics City of St. John's: 2006 and 2007			
	2006	2007	% Change
# of MCIT and Events	77	99	28.6
# of MCIT and Event Delegates	18,962	22,600	19.2
# of MCIT and Event Room Nights	40,433	45,856	13.4
Source: Destination St. John's			
Note: MCIT (Meetings, Conventions and Incentive Travel			

Table 23. Cruise Ship Statistics for Newfoundland and Labrador 2006 and 2007

Port	2006			2007		
	# of Port Calls	Crew Visits (Approx)	Passenger Visits	# of Port Calls	Crew Visits (Approx)	Passenger Visits
St. John's	19	7,247	14,724	14	4,692	8,696
Corner Brook	6	4,454	9,012	11	9,668	20,462
St. Anthony	9	1,624	3,283	6	1,278	2,504
L' Anse Aux Meadows	7	483	896	6	643	1,147
Trinity	1	36	90	1	53	108
Bonne Bay- Gros Morne	4	250	424	3	127	249
Red Bay	2	72	187	4	111	147
Cox's Cove	1	53	114	0	0	0
Terra Nova	1	53	114	0	0	0
Ramea	1	53	114	1	53	101
Francois	3	125	301	2	89	202
Battle Harbour	7	213	447	7	255	403
Cartwright	2	12	24	0	0	0
St. Brides- Cape St. Mary's	2	250	281	0	0	0
Bonavista	3	108	277	1	36	101
Twillingate	1	125	123	0	0	0
Hopedale	4	127	218	3	127	256
Goose Bay	0	0	0	4	81	103
Leading Ticks	0	0	0	1	53	108
Nain	3	91	128	1	38	47
Button Island	1	40	32	2	91	155
Burnside	0	0	0	1	53	108
Codroy Valley	3	125	301	2	89	202
Trepassey	0	0	0	1	6	10
Rigolet	2	12	24	2	69	40
Hebron	2	76	122	1	53	108
Grey River	2	72	187	1	36	101

Table 23. Cruise Ship Statistics for Newfoundland and Labrador 2006 and 2007

Port	2006			2007		
	# of Port Calls	Crew Visits (Approx)	Passenger Visits	# of Port Calls	Crew Visits (Approx)	Passenger Visits
Shuldham Island	0	0	0	1	53	108
Conception Bay South	1	921	1,791	0	0	0
Wunderstrands	0	0	0	1	63	28
Grand Bruit	0	0	0	1	53	101
Burego	0	0	0	1	6	10
Bateau	0	0	0	1	6	12
Man of War Point	1	40	32	0	0	0
St. Lewis	0	0	0	1	6	12
Black Tickle	0	0	0	1	6	12
Nachvak Bay/Eclipse Harbour	0	0	0	3	127	256
Seven Islands Bay	0	0	0	1	53	108
North West River	0	0	0	1	6	12
Conche	0	0	0	1	53	108
Port au Choix	2	72	187	1	38	47
Fogo Island	3	125	301	0	0	0
Change Islands	0	0	0	1	53	101
Burnt Cape/Raleigh	1	53	114	1	53	101
Tilting	1	53	114	1	53	101
Davis Inlet	2	12	24	0	0	0
Saglek Bay	1	36	90	1	36	101
Cape St. Charles	1	53	114	3	65	119
Pinsent Arm	2	12	24	0	0	0
Gannet Islands	2	12	24	0	0	0
Makkovik	2	12	24	1	6	12
Bay D'Espoir	0	0	0	1	53	101
Port Aux Basques	0	0	0	1	6	10
Rose Blanche	0	0	0	1	6	10

Port	2006			2007		
	# of Port Calls	Crew Visits (Approx)	Passenger Visits	# of Port Calls	Crew Visits (Approx)	Passenger Visits
Isle Aux Morts	0	0	0	1	6	10
Cape St. Georges	0	0	0	1	38	47
Total	105	17,102	34,262	102	18,546	36,885

Source: Cruise Newfoundland and Labrador
Note: Red Bay, Battle Harbour, Cartwright,, Hopedale, Goose Bay, Nain, Button Island, Rigolet, Hebron, Shuldham Island, Bateau, St. Lewis, Black Tickle, North West River, Wunderstrands,, Man of War Point, Nachvak Bay, Seven Islands Bay, Davis Inlet, Saglek Bay, Cape St. Charles, Pinsent Arm, Gannet Islands and Makkovik are Labrador ports of call.

Both Directions	2006	2007	% Change
Passenger Movements	62,733	63,420	1.1
Vehicle Movements (Excluding Tour Buses)	22,048	22,852	3.6
Tour Buses	163	156	-4.3

Source: Department of Transportation and Works

Visitors	2006	2007	% Change
Guest Book Registration (Information Centre)	980	534	-45.5
Motorcoach/Group (Visits)	9	12	33.3
Motorcoach/Group (People)	445	477	7.2

Source: Labrador West Tourism Association

Visitors	2006	2007	% Change
# of Visitors	3,131	4,411	40.9

Source: Labrador Interpretation Centre