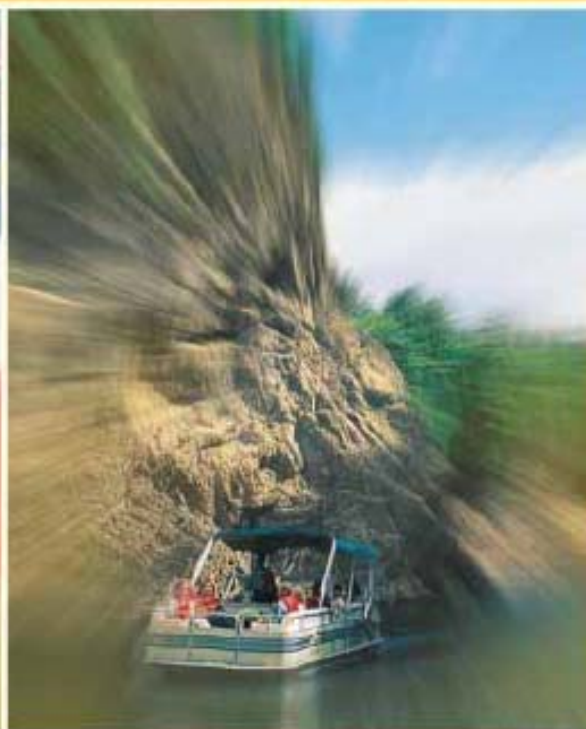




New Brunswick Tourism Industry Performance 2003



NB Tourism Industry Performance 2003

Highlights

Total tourism expenditures in New Brunswick reached \$1.1 billion in 2003, dipping slightly from last year's record breaking plateau.

A total of 1.86 million visitors visited the province this year. The Maritime Region provided the largest share of visitors with 31%, followed by the U.S. with 24%, Ontario 23% and Québec at 18%.

The \$1.1 billion in tourism spending created an estimated 31,000 person years of employment and generated \$272 million in tax revenues.

The total number of passengers from cruise lines entering New Brunswick at Saint John increased by 18% in 2003 from the previous year. A total of 84,044 passengers arrived in Saint John.

Tourism Expenditures and Impact

Tourism expenditures in New Brunswick totalled \$1.1 billion in 2003.

The \$1.1 billion in expenditures generated 31,000 person years of employment in the province and resulted in \$272 million in tax revenues.

The \$272 million in tax revenues generated \$147 million in federal taxes, \$83 million in provincial taxes and \$42 million in municipal receipts.

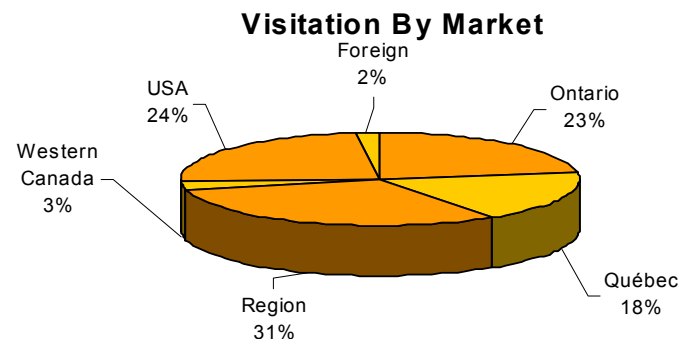
Tourism Expenditures by Market	
Market	2003 Total Expenditures
Regional	\$317M
Ontario	\$273M
Québec	\$238M
U.S.	\$189M
Western Canada	\$61M
Foreign	\$39M
Total	\$1.1B

Visitation

The province welcomed 1.86 million non-resident visitors in 2003.

In terms of origin, the Maritime Region supplied a leading 31% of visitors, followed by the U.S. with 24%, Ontario with 23% and Québec with 18%.

Although parts of Canada were ravaged with health scares and a slow American economy, the province of New Brunswick fared well with respect to non resident visitation. New Brunswick's decline in non resident visitation is estimated to be the smallest of the Atlantic Provinces.



Website and Communication Centre

The total number of inquiries to the Department's Communication Centre in 2003 was 276,600 down 7% from 2002.

A total of 174,259 downloadable publications (travel guide PDF files) were downloaded by unique users during the May to October time period.

The number of unique visitors to the TourismNewBrunswick.ca Web site in this year increased 12% over last year (482,000 in 2003).

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Accommodations Performance

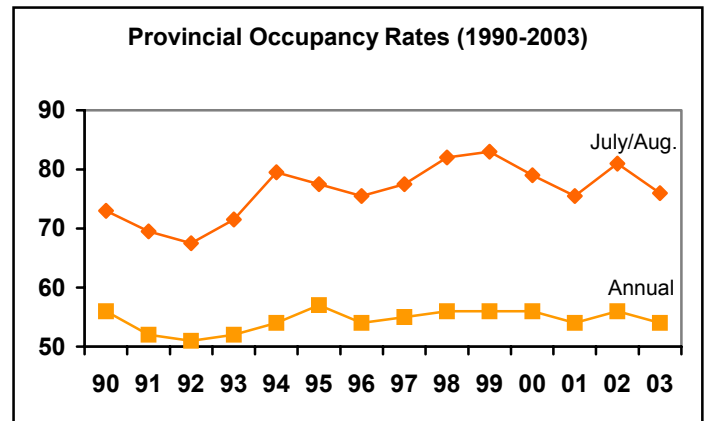
The occupancy rate for the peak months of July and August reached 75.5%, indicating that the province was operating at near capacity for a majority of the days in those weeks.

The annual occupancy rate averaged 54% for the year.

The average room rate increased from \$106.64 in 2002 to a new high of \$110.90 in 2003.

A total of 1.5 million rooms were sold in 2003, and the total number of rooms available was 10,846. The number of rooms sold in 2003 fell 3% from the total number of rooms sold in 2002.

With the increase in the average room rate, room sales totalled \$167 million, an increase of 4% over 2002.



The above chart illustrates annual and July/August occupancy rate percentages from 1990 to 2003.

Accommodations Capacity

Total accommodations capacity remained constant in 2003, with 10,846 available rooms.

Hotels and motels accounted for 80% of total capacity, with 8,678 rooms.

In terms of the number of properties, the hotel/motel sector remained constant in 2003.

Accommodations Capacity by Type			
	# of Properties	# of Rooms	Avg. Rooms per Property
Hotels/Motels	194	8,678	44.7
B & Bs	244	969	4.0
Cottages	115	741	6.4
Country Inns	53	458	8.6
Total	606	10,846	17.9

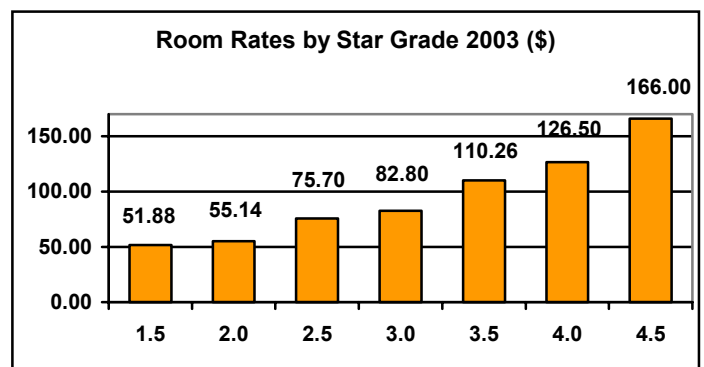
Average Room Rate

Average room rates, as quoted to tourists, increased by 3.9% to \$110.90 in 2003.

Although this rate represented a new high for the province, it remained the lowest in the Maritime Region.

Rates ranged from an average of \$51.88 for 1.5 star properties to an average of \$166.00 for 4.5 star properties.

Note: Room rates in this section are based on rates quoted to tourists (survey).



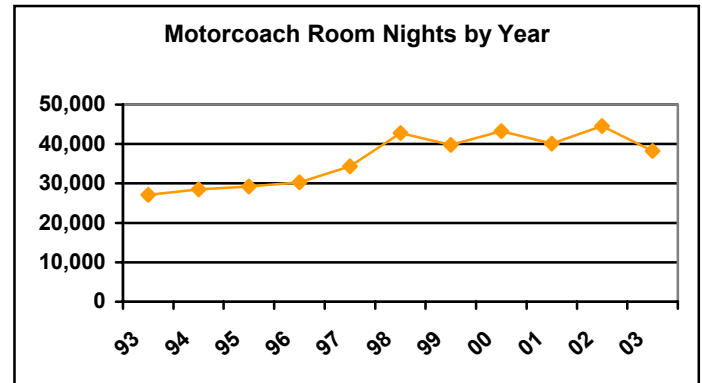
NB Tourism Industry Performance 2003

Motorcoach

Motorcoach room sales decreased by 14.2% in 2003, to a total of 38,241 rooms sold.

It is expected the number of room sales will recover in 2004 to the levels attained in 2002.

The drop in room sales has been attributed directly to health scares, a slow American economy and a rising Canadian Dollar.



The above chart illustrates motorcoach room sales in the province from 1993 to 2003. Room sales have increased by 41% over this period.

Attractions Attendance

Attendance at attractions dipped in 2003. This can be attributed to health scares, slow American economy and the increasing value of the Canadian dollar.

Combined attendance at leading provincially or federally supported attractions totalled over 1 million for the peak season of May to October, with a slight decrease of 9.3% over 2002.

Attraction	Visitors		% Change
	2002	2003	
Fundy National Park	271,998	253,879	-6.7
Hopewell Rocks	231,814	199,098	-14.1
Kouchibouguac National Park	185,594	172,555	-7.0
Le Pays de la Sagouine	86,058	78,083	-9.3
Village Historique Acadien	90,299	82,432	-8.7
Kings Landing	61,773	59,170	-4.2
Fundy Trail Parkway	73,580	66,308	-9.9
Aquarium and Marine Centre	45,334	39,045	-13.9
Kingsbrae Garden	30,141	24,323	-19.3
Fort Beauséjour	25,390	22,136	-12.8
Mount Carleton	10,937	12,064	10.3
Total	1,112,918	1,009,093	-9.3

Campground Performance

2003 was a solid year for provincial campground performance in the province.

Provincial Parks saw a total of 60,671 site nights sold.

New Brunswick residents represent 44% of all site nights sold.

Visitor Information Centre Performance

A total of 136,769 visitor parties were counselled at the seven Provincial Visitor Information Centres in 2003, down 13% from last year.

At VICs, Québec was the leading source of visitors (28%) followed by Ontario (26%), the U.S. (25%), and the Maritime Region (14%). The distribution between markets remains virtually unchanged from 2002.

