2016 EXIT SURVEY – Result Highlights

Government of Newfoundland and Labrador
Department of Tourism, Culture, Industry and Innovation
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Newfoundland Labrador

PROJECT OVERVIEW

The 2016 Non-resident Visitor Exit Survey (exit survey) served to update and enhance existing historical information on non-resident visitors to Newfoundland and Labrador. The survey was undertaken to improve annual estimates of visitation and expenditures as well as to update visitor characteristics. In addition to visitor characteristics, the survey also provided insights into visitors' trip characteristics, including experiences and activities, destinations visited, spending and satisfaction with various aspects of the visitor experience.

METHODOLOGY

Interviews were conducted with individuals leaving Newfoundland and Labrador through six major exit points. The 2016 survey covered all vehicle-related exit points from the Island portion of the province (Port Aux Basques and Argentia) and the major air exit points — St. John's, Deer Lake, Gander and Goose Bay, which, on a combined basis, represented 94% of all boarding passengers at the province's seven major airports. At each exit point, short interviews were conducted with travellers to gather key information and identify non-resident visitors exiting the province. A longer survey (main survey) was distributed to eligible and willing non-resident travellers at each exit point. Personal interviews collected traveller information related to origin, trip purpose, length of stay, party size and party composition. The main survey collected data on the characteristics of non-resident visitors, including destinations visited, participation in activities and experiences, expenditures and demographics.

Overall, a total of 23,793 personal interviews were conducted with non-residents at the six exit points and 6,532 returned questionnaires (main surveys) were included in the final analysis. Survey participants had the option of returning the main questionnaire via drop boxes at the exit points, by mail or by responding online.

Table 1: Number of Non-Residents Surveyed

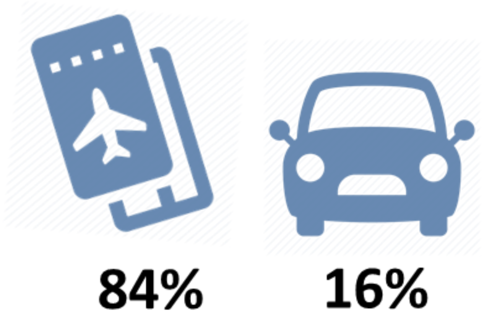
	Air Jan–Apr / Nov–Dec	Air May–Oct	Auto May–Oct	Total
Personal Interviews	4,223	16,188	3,382	23,793
Main Surveys	984	4,008	1,540	6,532

A detailed weighting system was applied to ensure the survey sample reflected the exiting non-resident population. It should be noted that the margin of error associated with the data varies depending on the size of the sample. Margins of error increase as sample sizes decrease.

Results in this ***Highlights Report*** focus on the peak travel season May to October. Unless otherwise stated, results for business travellers include those travelling for conferences/conventions.

VISITATION

It is estimated that a total of 206,159 non-resident travel parties* visited Newfoundland and Labrador during the May to October period, representing a total of 374,905 visitors.

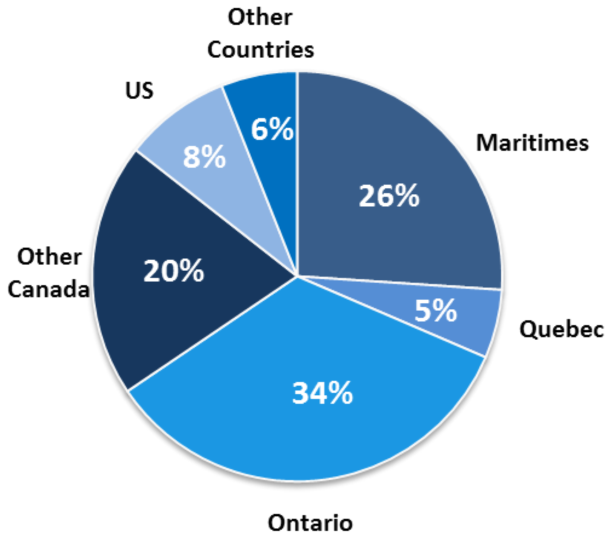


With more than 8 in 10 (84%) non-resident parties visiting during the May to October period travelling by air, air travel to the province continues to dominate. The share of air travel parties increased since the last survey in 2011 when 79% of parties travelled by air. This increase is attributed in part to increased inbound seat capacity into the province which was at its highest level in 2016 at over 1.3 million seats and giving visitors more options to access Newfoundland and Labrador.

*A travel party is defined as a group of people who travel together, share activities, experiences and related trip expenditures. A travel party may include more than one individual.

ORIGIN

Chart 1: 2016 Non-Resident Parties – Origin (% Parties; May to October)



Ontario remains Newfoundland and Labrador's major travel market

Chart 1 shows the origins of travel parties who visited Newfoundland and Labrador in 2016. Over one third (34%) of visitors came from Ontario, representing the province's largest source market. At over one quarter (26%), visitors from the Maritimes accounted for the second largest share of travel parties. In terms of other markets, Quebec represented 5% of non-resident parties while 20% of visitors arrived from provinces west of Ontario and the territories.

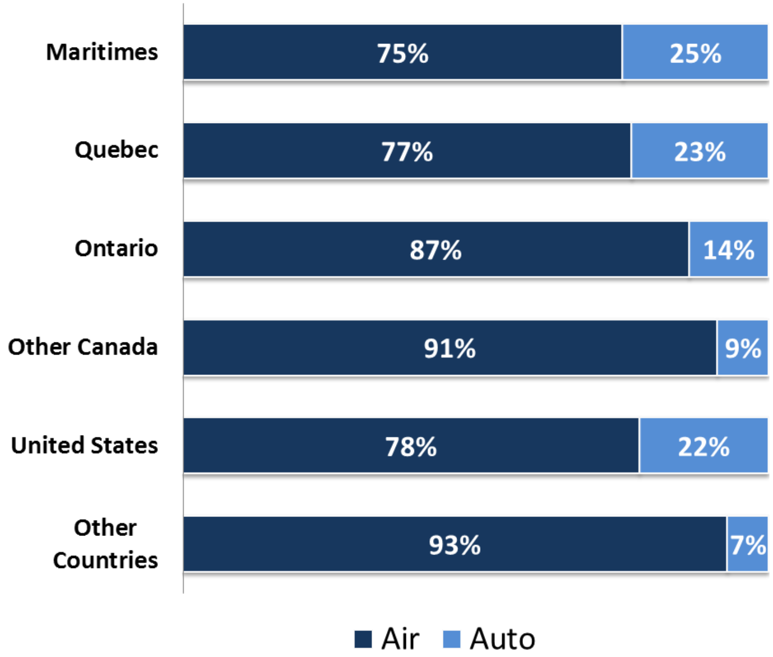
Accounting for a total of 86%, Canada remains the province's main travel market. In addition, 8% of parties travelled from the United States while the remaining 6% were from Other Countries. Overall, the share of travel party origins did not change significantly compared to the 2011 survey.

Table 2: 2016 Non-Resident Parties – Mode by Origin (% Parties; May to October)

Origin	Overall	Air	Auto
Maritimes	26%	23%	39%
Quebec	5%	5%	8%
Ontario	34%	35%	29%
Other Canada	20%	22%	11%
United States	8%	8%	11%
Other Countries	6%	6%	2%

Table 2 highlights the differences in origins between air and auto travel segments. Visitors from provinces west of Ontario and the three territories represented a far greater share of air travellers (22%) than of auto travellers (11%). Travel parties from the Maritimes represent the largest share of auto visitors (39%) while Ontarians comprise more than one third of air travellers. Visitors from the US are more likely to drive than to fly to Newfoundland and Labrador while visitors from other countries are more likely to fly rather than drive.

Chart 2: 2016 Non-Resident Parties – Origin by Mode (% Parties; May to October)



Air travel dominates in all markets

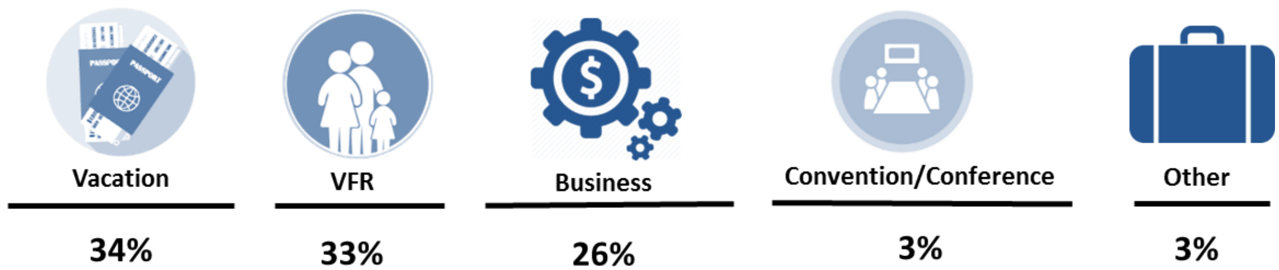
Chart 2 shows that while the majority of non-resident parties travelled by air, the proportion travelling by auto was noticeably higher among visitors from the Maritimes, Quebec and the US compared to other regions. Compared to 2011 survey results, the share of air travellers increased in all markets. The exception was Quebec where the share of auto travel parties increased from 19% to 23%.

Notable shifts between air and auto travel also occurred in the US where the share of auto travel parties decreased from 33% to 22% and the Maritimes (decrease from 31% to 25%). As well, more visitor parties from Ontario travelled by air, with 86% of parties flying compared to 81% in 2011.

TRIP PURPOSE

Most visitors come to Newfoundland and Labrador for vacation

Chart 3: 2016 Non-Resident Parties – Trip Purpose
(% Parties; May to October)



Thirty-four percent of non-resident parties visited Newfoundland and Labrador for vacation while another 33% came to visit friends and relatives (VFR). Twenty-six percent of travel parties came for business reasons and 3% specifically to attend conventions or conferences. Three percent of non-residents indicated they came for other reasons. Compared to the 2011 survey, there were no significant changes in the shares of visitor parties travelling to the province based on trip purpose.

Table 3: 2016 Non-Resident Parties – Mode by Trip Purpose
(% Parties; May to October)

Trip Purpose	Overall	Air	Auto
Vacation	34%	29%	58%
VFR	33%	34%	29%
Business	26%	30%	9%
Conference	3%	4%	<1%
Other	3%	3%	4%

Auto visitor parties continue to primarily travel for vacation, with 58% of auto parties citing vacation as the purpose of their trip. This represents a change over 2011, when 54% of auto travellers came for a vacation. In contrast, only 29% of air parties visit the province for vacation while the share of VFR parties among air travellers increased from 30% to 34%. Not surprisingly, the proportion of air visitors reporting business or a convention/conference as the main reason for their trip is significantly higher than the proportion among auto parties.

ORIGIN AND TRIP PURPOSE

Table 4: 2016 Non-Resident Parties – Origin by Trip Purpose (% Parties; May to October)

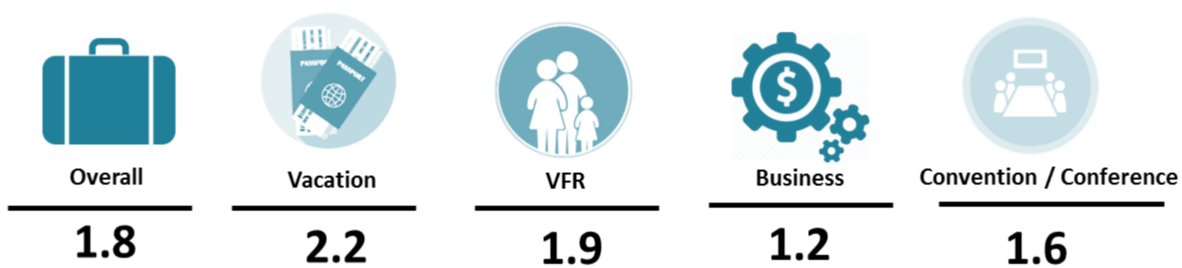
Origin	Vacation	VFR	Business	Other	Total
Maritimes	19%	30%	46%	4%	100%
Quebec	35%	15%	48%	2%	100%
Ontario	40%	34%	23%	2%	100%
Other Canada	33%	45%	17%	5%	100%
United States	52%	24%	23%	2%	100%
Other Countries	39%	27%	31%	3%	100%

At 52%, parties from the US were the most likely to travel for vacation, up from 46% compared to the 2011 survey. Travellers from Other Canada had the highest proportion of VFR visitors (45%). Nearly 40% of parties from Other Countries travelled for vacation while over 30% travelled for business. Almost half of Quebecers visited for business purposes and more visiting parties from the Maritimes came to the province for business (46%) than did for any other purpose. The share of travel parties visiting for business decreased for all origin markets with the exception of the Maritimes where it remained at similar levels as in 2011.

PARTY SIZE

Average travel party size is 1.8

Chart 4: 2016 Non-Resident Parties – Travel Party Size (May to October)



Overall, the average party size was **1.8** individuals, unchanged from 2011. At 1.7, the average party size of air travellers is noticeably lower than that of auto parties at 2.2. At 1.2 individuals per party, the average business party size is considerably lower than that of travellers for any other purpose.

Table 5: 2016 Non-Resident Parties – Average Party Size by Trip Purpose and Mode (May to October)

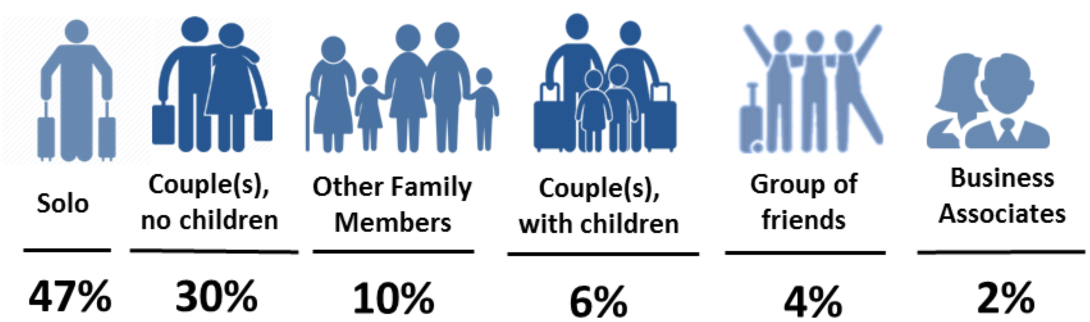
Trip Purpose	Overall	Air	Auto
Overall	1.8	1.7	2.2
Vacation	2.2	2.1	2.3
VFR	1.9	1.9	2.4
Business	1.3	1.3	1.6

Table 5 summarizes travel party size by purpose for each air and auto travellers. Auto travellers generally travel with more individuals than air parties. This is driven by business and conference visitors who travel almost exclusively by air and tend to travel in smaller parties, often alone. Party size is the highest among auto travellers visiting friends and relatives and lowest among air business travel parties.

PARTY COMPOSITION

Most visitors travel solo, vacationers as couples

Chart 5: 2016 Non-Resident Parties – Party Composition (% Parties, May to October)



Almost one-half (47%) of non-resident visitors to Newfoundland and Labrador travelled solo. Just under a third of travel parties consisted of couple(s) with no children (30%) – three times as many parties who travelled with other family members (10%).

Compared to the 2011 survey, visitors are tending to travel more as couple(s) with no children, and less with other family members. This change is driven by vacation visitors, with more than half of those parties (51%) travelling as couples, no children, up from 45% in 2011.

LENGTH OF STAY

Visitors stay for an average of 10.8 nights during their trip to Newfoundland and Labrador

Chart 6: 2016 Non-Resident Parties – Length of Stay by Trip Purpose (Nights; May to October)

During the May to October period, non-residents stayed, on average, 10.8 nights in the province, slightly longer than the 10.4 nights reported in 2011. The length of stay varied greatly depending on the purpose of the trip: it was longest for VFR travel parties at 11.6 nights while vacation parties stayed an average of 10.4 nights. Business visitors' average length of stay was 9.8 nights, with conference/convention travel parties staying 5.8 nights. The overall increase in length of stay is driven by increases in length of stay of both business and conference/convention visitors. As well, 21% of business travel parties and 63% of conference/convention travel parties reported extending their trip by three to four nights to participate in vacation activities.

Table 6: 2016 Non-Resident Parties – Average Length of Stay by Trip Purpose and Mode (Nights; May to October)

Trip Purpose	Overall	Air	Auto
Overall	10.8	10.0	15.1
Vacation	10.4	9.7	12.2
VFR	11.6	11.0	15.1
Business	9.8	8.6	32.1
Conference	5.8	n/a	n/a

Travel parties visiting by auto stayed generally longer, on average, than those visiting by air at 15.1 nights compared to 10.0 nights respectively. **Table 6** shows the differences in length of stay by mode of travel and trip purpose, indicating that business auto travel parties stayed longer than anybody else and almost four times longer than business travellers by air. Auto travellers visiting friends and relatives had, on average, 15.1 nights' stays, four nights longer than VFR parties travelling by air. At 12.2 nights, vacation auto parties also stayed 2.5 nights longer than those travelling by air for the same purpose.

EXPENDITURES

Travel parties visiting for vacation outspend all other travellers

Table 7: 2016 Non-Resident Parties – Average Expenditure by Trip Purpose and Mode (May to October)

Trip Purpose	Overall	Air	Auto
Overall	$2,095	$2,085	$2,152
Vacation	$3,470	$3,773	$2,600
VFR	$1,310	$1,322	$1,240
Business	$1,453	$1,399	$3,210

Spending by non-resident visitors is a function of trip purpose, length of stay as well as party size. Trip purpose generally influences where visitors stay, what they do and what they buy during their trip. Overall, the average expenditure reported by all travel parties was **$2,095**, with auto travellers reporting slightly higher spending than air travellers.

Table 7 notes the differences in average spending per party by trip purpose and mode of travel. Overall, non-resident parties travelling for vacation spent the most during their visit at $3,470. This compares to $1,310 for those visiting friends and relatives and $1,453 for those coming for business reasons. At $3,773, air travel parties visiting for vacation spent considerably more than auto visitors travelling for the same purpose ($2,600). Expenditures by VFR visitor parties and those travelling for business showed some differences for both modes of transportation: VFR auto parties spent on average $1,240 compared to $1,322 for air parties while business auto parties spent $3,210 and air business parties $1,399. The comparatively high spending level among auto business visitors is due to their longer average stays of 32 nights.

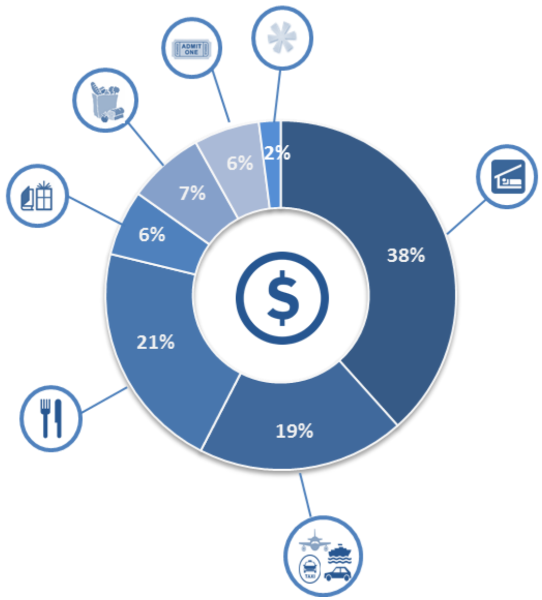


Chart 7: 2016 Non-Resident Parties – Travel Party Expenditures by Category (May to October)

Overall per party spending can be attributed to a variety of categories, with accommodations accounting for most of the dollars spent at 38%, while restaurants and transportation account for another 21% and 19% respectively. These three spending categories together represent more than three quarters (78%) of all per party expenditures in the province.

Furthermore, 7% of per party expenditures are spent on store-bought food and beverages and 6% each is spent on arts, crafts and souvenirs as well as activities and experiences.

Table 8: 2016 Non-Resident Parties – Expenditure Patterns (% of Total $$ Spent; May to October)

Expenditure Type	Overall	Air	Auto
Transportation	19%	19%	18%
Accommodations	38%	38%	39%
Restaurants	21%	22%	19%
Groceries	7%	6%	8%
Arts, Crafts, Souvenirs	6%	6%	8%
Activities, Experiences	6%	6%	6%
Other	2%	2%	2%

Table 8 shows the overall distribution of per party expenditures by type of spending. For both air and auto travel parties, spending is highest on accommodations which accounts for nearly $40 of every $100 spent. Overall, spending by type of expenditure does not differ greatly between air and auto parties, with air parties spending a slightly higher share of dollars on restaurants while a higher share of spending goes towards store-bought food and beverages among auto travel parties.

ACCOMMODATIONS

Paid accommodations dominate, with hotels/motels being the most popular among visitors

Table 9: 2016 Non-Resident Parties – Share of Party Nights by Type of Accommodation and Mode (% Nights; May to October)

Accommodation Type	Overall	Air	Auto
Hotel/Motel	26%	28%	19%
B&B/Country Inns	8%	8%	7%
Apartment/room in private home (not owned by relative/friend)	6%	6%	5%
Rented Vacation Home	5%	5%	7%
Commercial Cabins/Cottages	4%	4%	4%
Campgrounds – All Types	4%	2%	10%
Commercial Outfitting Camps	1%	1%	2%
Houses/Cabins of Relatives/Friends	32%	32%	29%
Own Home/Residence	10%	9%	15%
All Other Types of Accommodation	5%	5%	2%

At 57%, visitor travel parties spent the majority of nights in paid accommodations while travelling in the province. In terms of share of all party nights, almost one third (32%) is spent in houses/cabins owned by relatives or friends, with just over one quarter (26%) spent in hotels/motels. In addition, 8% of nights were spent in B&Bs/Country Inns, 4% at campgrounds (including provincial/national parks and commercial campgrounds) and 4% in Commercial Cabins/Cottages.

Visitors also spent nights in properties they own (9%), in rented vacation homes (5%) and in apartments/rooms in private homes not owned by friends or relatives (6%). Visitors spent 5% of nights in other forms of accommodations such as hostels and student residences. Air travellers spent significantly more nights at hotels/motels, while auto travellers spent a higher share of nights at their own homes/residences and at campgrounds than air parties.

OVERNIGHT DESTINATIONS

St. John's and the west coast remain key destinations for non-resident visitors

Table 10: 2016 Non-Resident Parties – Areas of Province Visited and Stayed at Least One Overnight (% Parties; May to October)

Economic Zone	Overall	Air	Auto
Zone 1: Rigolet to Nain	0.3%	0.3%	0.0%
Zone 2: Labrador West/Churchill Falls	0.3%	0.3%	0.6%
Zone 3: Happy Valley/Goose Bay/Northwest River	3.4%	4.0%	0.6%
Zone 4: Mary's Harbour to Cartwright	0.5%	0.4%	0.6%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	2.4%	2.4%	2.4%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee	9.9%	8.0%	19.3%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	19.8%	16.1%	38.6%
Zone 8: Deer Lake/Humber Area	11.4%	9.8%	19.6%
Corner Brook/Massey Drive	10.7%	7.8%	25.4%
Zone 9: Stephenville/Port-au-Port/Burgeo	4.2%	2.3%	13.7%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	5.0%	1.2%	24.5%
Zone 11: Baie Verte/La Scie/Green Bay	3.7%	3.1%	6.8%
Zone 12: Grand Falls Windsor Area	7.4%	6.1%	14.1%
Zone 13: Bay D'Espoir Area	0.9%	0.7%	2.1%
Zone 14: Gander/Twillingate East to Terra Nova	23.5%	21.1%	36.0%
Zone 15: Clarenville/Bonavista Peninsula Area	18.8%	18.5%	20.6%
Zone 16: Burin Peninsula	3.2%	3.0%	4.7%
Zone 17: North West Avalon	7.6%	8.0%	5.8%
Zone 18: Argentia/Placentia Area	2.6%	2.6%	2.7%
Zone 19: North East Avalon (Excluding St. John's)	7.5%	7.8%	5.7%
St. John's	64.2%	68.8%	40.2%
Zone 20: Southern Shore Area	4.3%	4.4%	3.7%

The areas of Newfoundland and Labrador visited by non-residents are greatly influenced by how visitors travel to the province (air versus auto).

Overall, St. John's, the Gander/Twillingate area, Gros Morne area and the Clarenville/Bonavista area remain the most popular among visitors, with party overnight stays ranging from nearly one in five parties in the Clarenville/Bonavista area to almost two thirds of parties staying in St. John's.

Some areas across the province tend to be highly frequented by auto travellers, including the Gros Morne area where 39% of auto travel parties spent at least one overnight and the Gander/Twillingate area at 36%. Compared to air travellers, higher shares of auto travellers tend to overnight in areas along the west coast of the province. On the other hand, air travellers are much more likely to stay overnight in St. John's than auto travellers.

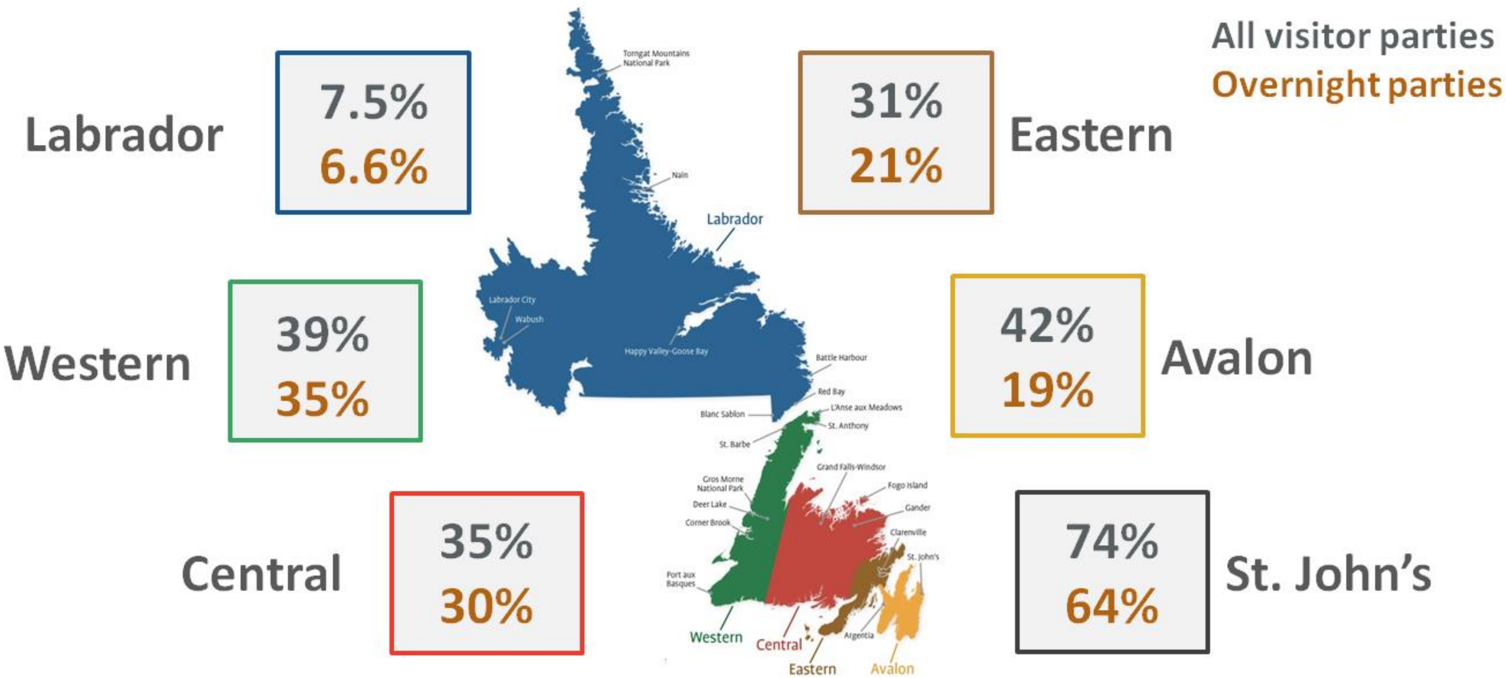
While fewer travel parties tend to stay overnight in Labrador, the Labrador Straits area is popular among both air and auto travellers, with 4% of air travel parties also staying at least one overnight in the Happy Valley-Goose Bay area.

REGIONAL DESTINATIONS

Visitors take in all regions of Newfoundland and Labrador

Visitors continue to travel across the entire province to take in the varied experiences and attractions in all regions. In addition to overnight visitors, the 2016 exit survey also captured the share of travel parties who visited certain places and attractions in the regions without staying overnight. As a result, the total number of visitors to a region – regardless of whether they stayed overnight or not – can be reported as shown in **Chart 8**. Nearly three quarters of all travel parties visited St. John's while more than two in five travel parties took in the neighbouring Avalon region. Nearly as many travel parties (39%) visited the Western region, with more than 30% of parties visiting the Central and Eastern regions of the province. The Labrador region welcomed 7% of all visitor parties to the province.

Chart 8: 2016 Non-Resident Parties – Total and Overnight Visitor Parties to Regions of Newfoundland and Labrador (% Parties; May to October)



Travellers who reported visiting the St. John's area were most likely to visit the Downtown area (89%), with Signal Hill (79%), George Street (61%), Cape Spear (58%) and Quidi Vidi Village (53%) also representing frequently visited places and attractions. Popular attractions and communities among visitors to the Avalon Peninsula include the East Coast Trail (29%), Brigus (28%), Bay Roberts (27%), the Witless Bay Ecological Reserve (26%) and the Colony of Avalon in Ferryland (24%). Among Eastern region visitors, most travel parties reported having visited Bonavista (62%), Clarenville (58%), Trinity (56%) and Cape Bonavista (54%). Hiking and walking trails in the region were also popular.

Among Central region visitors, the communities of Gander (61%) and Twillingate (48%) were the most visited, with regional hiking and walking trails (38%) and Terra Nova National Park (35%) rounding out the top destinations. Gros Morne National Park (65%) was the most visited attraction in the Western region among visitors to that area, while Corner Brook (59%), regional hiking and walking trails (53%) and Western Brook Pond (36%) were also popular. In Labrador, the communities of Happy Valley-Goose Bay and Red Bay (39%) were the most visited destinations, followed by Southern Labrador communities and the Point Amour Lighthouse (29%).

Chart 9: 2016 Non-Resident Parties – Top Regional Places and Attractions Visited (May to October)

Labrador	Western	Central	Eastern	Avalon	St. John's Area
Happy Valley-Goose Bay	Gros Morne National Park	Gander	Bonavista	East Coast Trail	Downtown St. John's
Red Bay	Corner Brook	Twillingate	Clarenville	Brigus	Signal Hill
Southern Labrador communities	Hiking/walking trails	Hiking/walking trails	Trinity	Bay Roberts	George Street
Point Amour Lighthouse	Western Brook Pond	Terra Nova National Park	Cape Bonavista	Witless Bay Ecological Reserve	Cape Spear
Labrador Coastal Drive	St. Anthony	Grand Falls-Windsor & surroundings	Elliston	Colony of Avalon (Ferryland)	Quidi Vidi Village
Trans Labrador Highway	L'Anse aux Meadows	Fogo Island/Change Islands	Skerwink Trail	Cupids	City hiking/walking trails
Hiking/walking trails	Stephenville/Port au Port	Springdale/King's Point area	Other trails	Cape St. Mary's	Petty Harbour
Labrador Interpretation Centre	Port au Choix	Green Bay/Baie Verte area	Tickle Cove/King's Cove	Other Bay de Verde Peninsula communities	The Rooms

ACTIVITIES AND EXPERIENCES

Pleasure walking in communities and trail hiking are top outdoor experiences

Table 11: 2016 Non-Resident Parties – Participation in Outdoor/Recreational Experiences (% Parties; May to October)

	Overall	Air	Auto
Pleasure walking in/around communities	75%	75%	79%
Hiking/walking on trails	60%	59%	65%
Whale Watching	31%	30%	35%
Visited a National Park (Gros Morne, Terra Nova, Torngat Mountains, Mealy Mountains)	31%	27%	52%
Seabird watching (e.g. puffins, gannets, murres)	30%	31%	30%
Visited other parks, including nature parks and ecological reserves	30%	29%	31%
Wildlife viewing	29%	27%	39%
Iceberg viewing	26%	24%	36%
Sightseeing boat tour	25%	24%	27%
Other bird watching	17%	17%	16%
Geological tour/fossil observation	15%	15%	16%
Botanical garden/plant observation	13%	13%	12%
Ocean fishing	9%	9%	10%
All-terrain/Utility Vehicle (ATV/UTV) Touring	7%	7%	8%
Angling (fresh water)	5%	5%	7%
Canoeing/kayaking/rafting	5%	4%	5%
Golfing	4%	3%	4%
Mountain biking/cycling	3%	2%	4%
Hunting (big game – bear, moose, caribou)	1%	1%	2%
Hunting (small game – hare, grouse)	<1%	<1%	<1%

Activities and experiences travellers participated in are closely linked to their mode of travel. However, regardless of how people travelled here, pleasure walking in and around communities as well as trail hiking showed the highest levels of participation – 75% of all travel parties did some pleasure walking in/around communities while 60% went hiking/walking on trails. Visitors also marvel at the province's natural wonders, with whale watching, seabird watching, wildlife viewing and iceberg viewing remaining among the most popular outdoor activities that visitors engage in while National and other parks remain of high interest as well. The share of participation among travel parties in a geological tour/fossil observation nearly doubled compared to the 2011 survey, a reflection of the province's increasing popularity of its geological assets, including Mistaken Point, which was designated a UNESCO World Heritage Site in 2016.

Table 11 shows the differences in the participation levels in activities and experiences between auto and air travellers. Auto travellers appear to have had a greater opportunity to observe wildlife and icebergs. Furthermore, visiting a national or provincial park as well as hiking, whale watching and seabird watching continue to be most popular among auto travel parties.

Experiencing local cuisine and exploring small/rural communities are the most popular cultural/heritage experiences

Table 12: 2016 Non-Resident Parties – Participation in Cultural/Heritage Experiences (% Parties; May to October)

	Overall	Air	Auto
Local cuisine/culinary experiences	58%	59%	52%
Explored small/rural communities	53%	51%	65%
Historic sites/museums/interpretation centres	51%	50%	57%
Experienced nature/history at or around a lighthouse	46%	45%	51%
Went to a local pub for a live performance	36%	38%	25%
Galleries/exhibits	31%	32%	27%
Archeological sites (interpretative tour/ hands-on dig)	13%	13%	15%
Theatre plays/other live performances	13%	14%	11%
Participated at a special program at an attraction	9%	10%	7%
Experienced aboriginal culture/traditions/history	9%	9%	10%
Watched/participated in creating arts/crafts	5%	6%	4%

Experiencing local cuisine and exploring small/rural communities were the top two cultural/heritage experiences at 58% and 53% respectively among non-resident visiting parties. More than half of all travel parties (51%) visited historic sites, museums or interpretation centres. Taking in nature/history at or around a lighthouse (46%), going to a local pub for a live performance (36%) and visiting galleries or exhibits (31%) are also popular cultural and heritage experiences among visitors.

Depending on whether visitors travelled by auto or air, there are some differences in the extent to which travellers took in the various experiences. Auto parties were much more likely to explore small/rural communities (65%) or visit historic sites (57%) compared to air travellers (51%/50%). On the other hand, compared to auto parties, air parties were more likely to take in culinary experiences or visit a local pub for a live performance.

Table 13: 2016 Non-Resident Parties – Participation in Festivals and Events (% Parties; May to October)

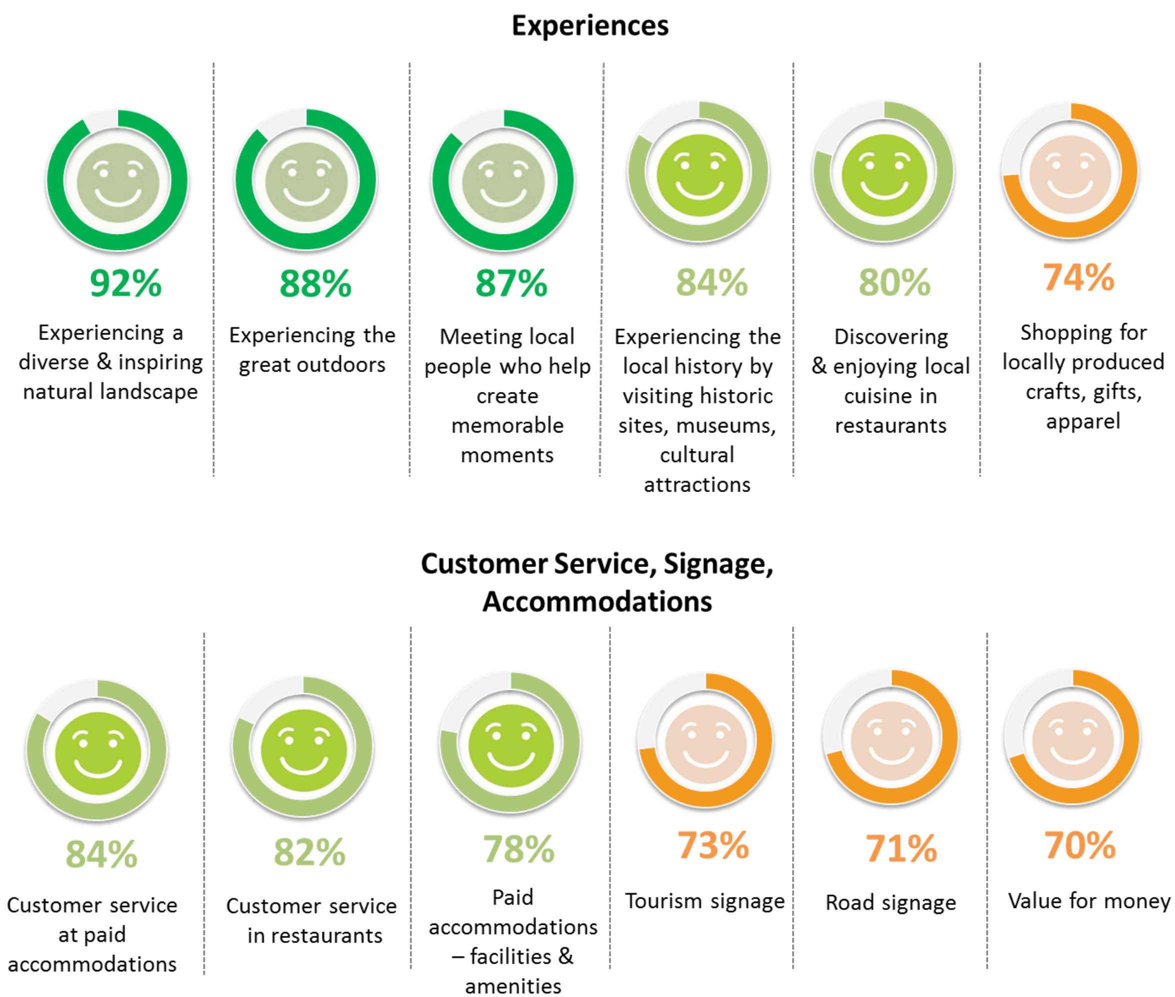
	Overall	Air	Auto
Participated in a local/community event	15%	14%	16%
Attended a music festival/event	11%	11%	10%
Attended a food/drink-themed festival	5%	5%	4%
Attended/participated in a sports event/tournament	3%	3%	2%

Table 13 shows the participation levels of travel parties in various types of festivals and events. Overall, about one quarter of travel parties (24%) took in some type of event. Local/community type of events as well as music events were enjoyed by more than 10% of travel parties while only 5% participated in a food- or drink-themed event.

TRIP SATISFACTION

Visitors are generally highly satisfied with their trip experiences in Newfoundland and Labrador

Chart 10: 2016 Non-Resident Parties – Trip Satisfaction (% of Parties Rating 8-10 on a 1-10 point scale; May to October)



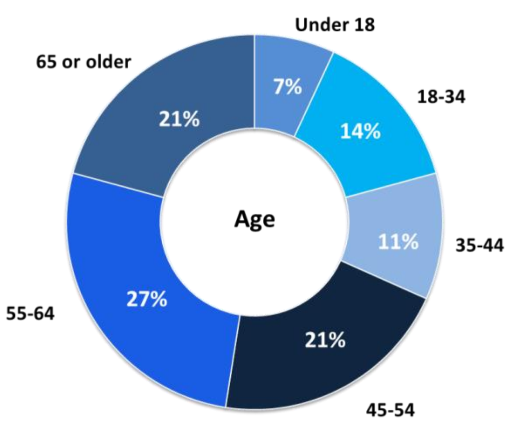
Overall, travellers to Newfoundland and Labrador showed high levels of satisfaction with most aspects of their trip. Visitors showed the highest levels of satisfaction with the ability to experience a diverse and inspiring natural landscape and to enjoy the great outdoors, with 92% and 88% of travel parties rating their satisfaction at 8 to 10 on a 1-10 point scale. Meeting local people (87%) and experiencing local history by visiting historic sites, museums and cultural attractions also received high levels of satisfaction at 84%.

Visitors were greatly satisfied with customer service in restaurants (82%) and at paid accommodations (84%). Lower levels of satisfaction were noted for visitor experiences involving shopping for locally produced crafts, gifts and apparel (74%). Visitors were less satisfied with tourism signage (73%), road/highway signage (71%) and overall value for money (70%).

VISITOR DEMOGRAPHICS

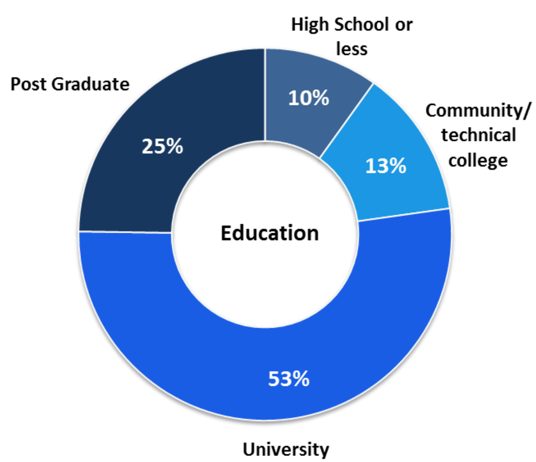
Visitors to Newfoundland and Labrador tend to be older, well-educated and affluent

Chart 11: 2016 Non-Resident Visitors – Age (% Visitors; May to October)



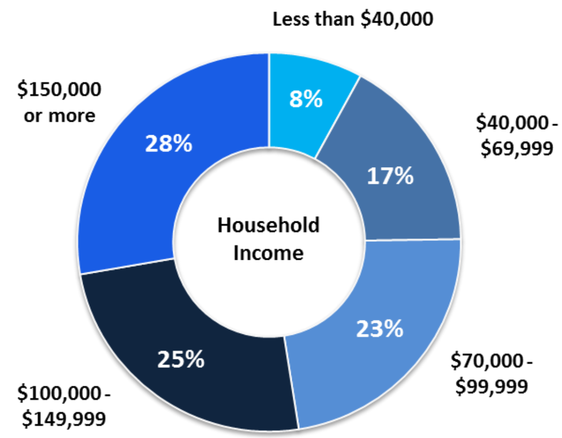
Almost half (48%) of non-resident visitors to Newfoundland and Labrador are age 55 or older, with one in five travellers being age 65 years or older. The same share of visitors are aged 45 to 54 while only one in ten travellers is between the ages of 35 and 44. Slightly more visitors – 14% – are between 18 and 34 years old (the age group that is also known as “Millennials”).

Chart 12: 2016 Non-Resident Visitors – Education (% Visitors; May to October)



Visitors to Newfoundland and Labrador are highly educated, with 25% of visitors holding post-graduate degrees and 53% having graduated university. Only 10% of visitors indicated a level of education of high school or less while another 13% finished a community or technical college.

Chart 13: 2016 Non-Resident Parties – Household Income (% Parties; May to October)



Generally, travel parties visiting Newfoundland and Labrador are affluent, with over half of them (53%) reporting household incomes of greater than $100,000. This group includes nearly one in three travel parties (28%) with household incomes of more than $150,000. About one quarter of travel parties indicated household incomes of less than $70,000, including 8% with less than $40,000.