VISITOR PROFILE –

HIGHLIGHTS FROM THE 2023 VISITOR EXIT SURVEY

Government of Newfoundland and Labrador
Department of Tourism, Culture, Arts and Recreation

Newfoundland & Labrador

VISITOR EXIT SURVEY OVERVIEW

The **2023 Non-resident Visitor 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 from May to October. The 2023 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 over 90% 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. These personal interviews collected traveller information related to origin, trip purpose, length of stay, travel party size and composition. A survey card with a link to a longer survey (main survey) was distributed to eligible and willing non-resident travellers at each exit point. The main survey collected detailed data on the characteristics of non-resident visitors, including destinations visited, participation in activities and experiences, expenditures and demographics.

Overall, a total of **15,350 personal interviews** were conducted with non-residents at the six exit points and **4,644 returned questionnaires (main surveys)** were included in the final analysis. 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.

It is estimated that a total of 197,668 non-resident travel parties visited Newfoundland and Labrador during the May to October period, representing a total of 370,594 air and auto visitors.

15,350 short interviews with visitors at 4 airports and 2 ferry terminals

4,644 detailed visitor surveys returned

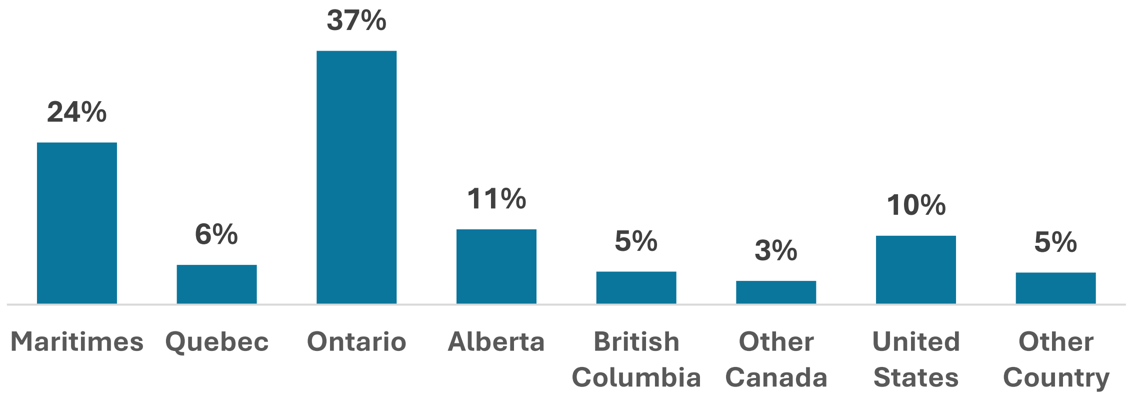
HOW TO READ THIS VISITOR PROFILE: Results in this ***Overall Visitor Profile*** focus on the peak travel season May to October. Results shown represent visitors travelling to Newfoundland and Labrador for **all trip purposes (i.e. "visitors overall")** – those visiting friends and relatives (VFR), those visiting for business purposes and those visiting for vacation/leisure. Unless otherwise noted, results for business travellers include those travelling for conferences/conventions. Where relevant, results for a specific visitor segment are shown to highlight important differences between types of visitors. Results refer to 'travel parties' - 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. The terms 'travel party' and 'visitor' are used interchangeably throughout this report.

VISITOR ORIGIN

Ontario remains Newfoundland and Labrador's major travel market

Visitors to Newfoundland and Labrador come from a variety of markets, with Canada accounting for the largest share at 85% and remaining the province's main travel market. Over one third (37%) of visitors came from Ontario, representing the province's largest source market. At one quarter (24%), visitors from the Maritimes accounted for the second largest share of visitation while visitors from the western regions of Canada represented 19% of all non-resident visitation, including 10% from Alberta, 5% from British Columbia, and 3% from the Prairies and Territories. Six percent of visitors were from the province of Quebec. Visitors from the United States accounted for 10% of visitation while 5% of visitors were from overseas.

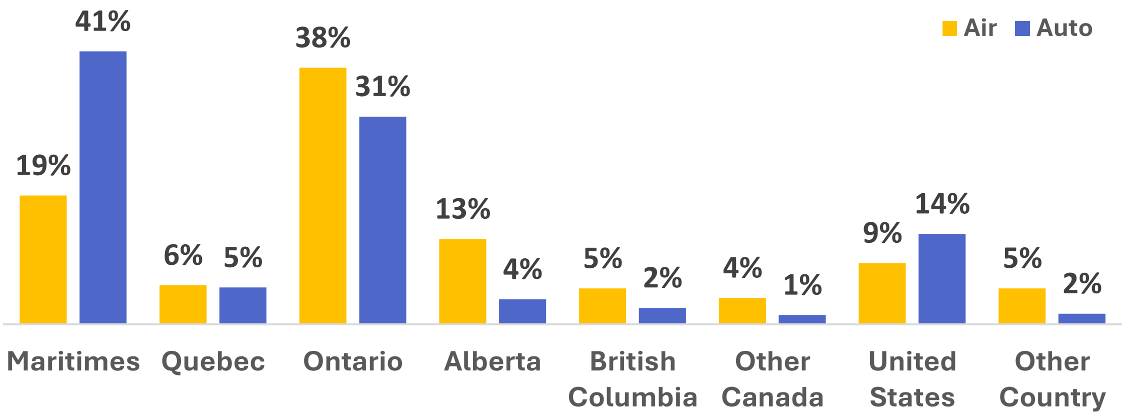
Visitor Origin (% parties)



Maritime region represents the strongest drive market

Origins vary by mode of transportation, with the Maritimes accounting for the strongest drive market at 41% while Ontario (38%) represents the largest share of air visitors. Not surprisingly, visitors originating in markets further away from the province are more likely to fly to their destination rather than drive, including visitors from Alberta, who represent 13% of air visitors but only 4% of auto visitors. The opposite is true for the Maritimes which accounts for twice the share of auto visitors (41%) as air visitors (19%). As in the past, visitors from the US represent a much higher share of auto visitors (14%) compared to air visitors (9%). Similar to the Canada's western region markets, at 2%, the share of visitors from other countries among auto visitors is smaller than their share of air visitors (5%).

Visitor Origin by Mode of Transportation (% parties)

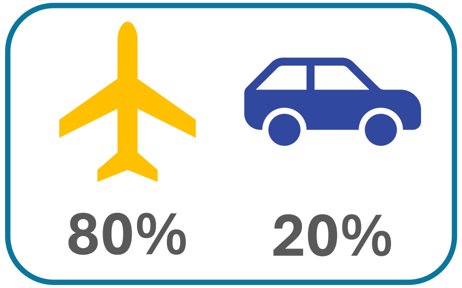


Origin 2023 v. 2016 (% parties)

Origin	2023	2016	Origin	2023	2016
Maritimes	**24%**	26%	**British Columbia**	**5%**	5%
Quebec	**6%**	5%	**Other Canada**	**3%**	4%
Ontario	**37%**	34%	**United States**	**10%**	8%
Alberta	**11%**	11%	**Other Country**	**5%**	6%

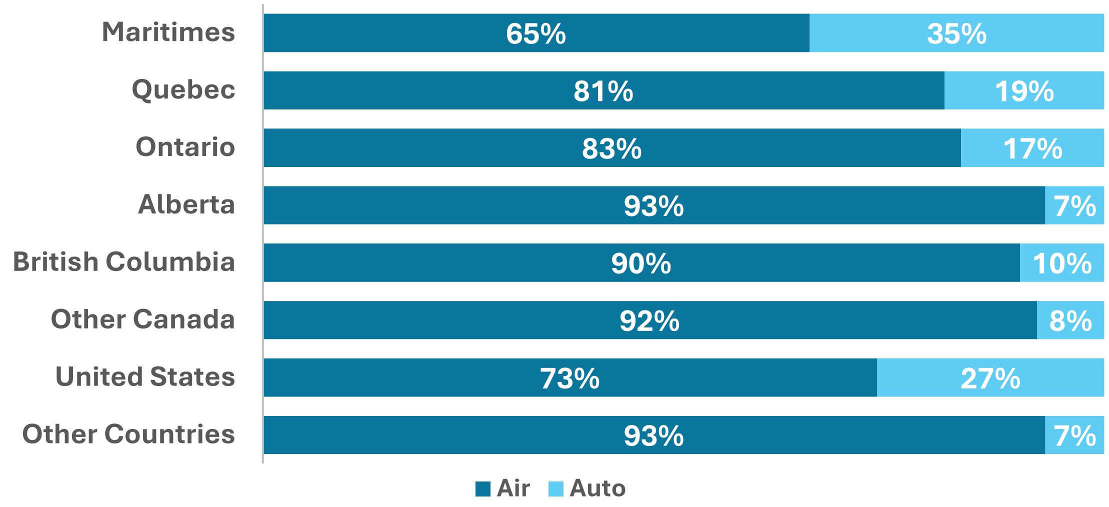
Overall, visitor origins did not change significantly compared to the 2016 survey. The share of visitors from Ontario (+3 percentage points), the United States (+2) and Quebec (+1) increased slightly while very small decreases were seen in the share of visitors from the Maritimes (-2 points), overseas (-1) and Other Canada (-1).

Mode of Transportation: Air travel continues to dominate



With 8 in 10 (80%) of non-resident visitors travelling by air, air travel to the province continues to dominate. The share of air travel parties decreased slightly since the last survey in 2016 when 84% of parties travelled by air. In 2023, 20% of visitors travelled by vehicle, up notably from 16% in 2016.

Origin by Mode of Transportation (% parties)



While the majority of non-resident parties from all markets travelled by air, the proportion travelling by vehicle was noticeably higher among visitors from the Maritimes and the United States compared to visitors from other regions. Compared to 2016 survey results, the share of visitors travelling by air increased from Quebec (from 77% to 81%) while the share of auto travellers increased in the Maritimes (from 25% to 35%), Ontario (from 14% to 17%), and the United States (from 22% to 27%). Not surprisingly, nearly all visitors from overseas travelled to Newfoundland and Labrador by air (93%), unchanged from 2016.

Rental vehicles: Essential for air travellers

Air visitors renting a vehicle: **45%**

Vehicle renters renting a vehicle through Turo: **4%**

Vehicle renters renting an electric vehicle: **5%**

Rental vehicles are an essential means of transportation for air visitors to travel around the province. This is substantiated by the fact that nearly half of air visitors (45%) rented a vehicle during their trip in Newfoundland and Labrador. At 67%, this share is even higher among vacation visitors, underlining the importance of rental vehicle availability. To address the issue of rental vehicle availability, the car-sharing service Turo launched in the province in 2022. While 4% of air visitors indicated that they did rent a vehicle through Turo, the vast majority of air visitors (92%) rented a vehicle through established rental companies such as Avis, Budget or Enterprise. Five percent of vehicle renters reported renting either a fully electric (1%) or hybrid (4%) vehicle.

For those visiting by auto, vehicle rentals are less critical; however, visitors from further away tended to be more likely to be driving a rented vehicle. Overall, 6% of auto visitors reported that they were driving a rented vehicle, with four in ten of them (39%) hailing from the US and other countries. Among Canadian auto visitors, those from Alberta and BC were the most likely to be driving a rented vehicle. Six percent of auto visitors reported that were driving a fully electric (1%) or hybrid (5%) vehicle.

6% Auto visitors driving an electric/hybrid vehicle

TRIP PURPOSE

Most visitors come to Newfoundland and Labrador for vacation

Vacation	VFR	Business	Conference	Other
41%	36%	18%	2%	2%

Forty-one percent of visitors travelled to Newfoundland and Labrador for vacation while another 36% came to visit friends and relatives (VFR). Eighteen percent of visitors came for business, 2% to attend a conference and another 2% indicated they visited for other reasons. At 41%, there was a significant increase in the share of travellers visiting the province for vacation (up from 34%) compared to 2016. The share of VFR travellers also increased compared 2016, from 33% to 36%. Business travel was significantly weaker in 2023, representing 18% of visitation to the province, down from 26% in 2016. This decrease was largely driven by weakness in global business travel which has yet to recover from the pandemic. Conference travel declined slightly, from 3% in 2016 to 2% in 2023.

At 54%, auto visitor parties continue to primarily travel for vacation. This compares to 38% of air travellers who cited vacation as the purpose of their trip. The share of visitors who reported business or conference as their trip purpose is significantly higher among visitors by air than by auto.

Trip Purpose 2023 v. 2016 (% parties)

Purpose	2023	2016	2023	2016	2023	2016
Vacation	**41%**	34%	**38%**	29%	**54%**	58%
VFR	**36%**	33%	**36%**	34%	**36%**	29%
Business	**18%**	26%	**21%**	30%	**5%**	9%
Conference	**2%**	3%	**3%**	4%	**<1%**	<1%
Other	**2%**	3%	**2%**	3%	**4%**	4%

Origin by Trip Purpose (% parties; each origin = 100%)

	Vacation		VFR		Business	
	2023	2016	2023	2016	2023	2016
Maritimes	**24%**	19%	**40%**	30%	**33%**	46%
Quebec	**47%**	35%	**15%**	15%	**36%**	48%
Ontario	**46%**	40%	**36%**	34%	**16%**	23%
Alberta	**36%**	27%	**52%**	52%	**10%**	14%
British Columbia	**43%**	41%	**39%**	36%	**15%**	20%
Other Canada	**42%**	42%	**36%**	34%	**18%**	22%
United States	**65%**	52%	**22%**	24%	**11%**	23%
International	**40%**	39%	**35%**	27%	**23%**	31%

Trip purpose varies significantly across origin markets, with visitors from the Maritimes (40%) and Alberta (52%) much more likely to be in Newfoundland and Labrador to visit friends and relatives than for vacation purposes. Visitors from the United States are most likely to visit the province for vacation, with 65% of this market doing so. Quebec (47%) and Ontario (46%) are also strong vacation markets. Visitors from other countries are nearly as likely to visit friends and family (35%) as they are to vacation (40%) in the province. Compared to other markets, significantly higher shares of Quebecers (36%) and Maritimers (33%) were in the province on business, with nearly one quarter of international visitors (23%) also doing so.

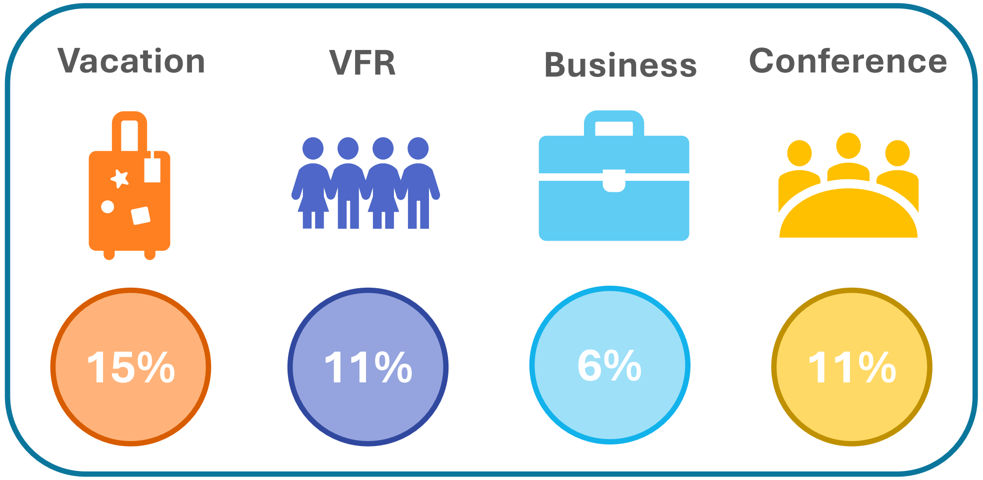
Compared to 2016, most markets have experienced significant growth in the share of visitors who indicated that vacation was the main purpose of their trip. The most notable increases can be seen in Alberta (36%, up from 27%), Quebec (47% up from 35%) and the United States (65% up from 52%). The share of business travel dropped significantly across all markets.

33% of business visitors extended their trip to participate in *leisure* activities

54% of conference visitors extended their trip to participate in *leisure* activities

COVID-19 PANDEMIC IMPACT ON TRAVEL

Current Trip Was a Postponed Trip due to COVID-19 (% parties)

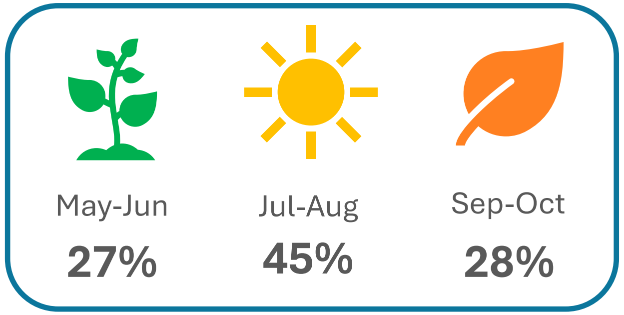


Tourism was one of the sectors most impacted by the COVID-19 pandemic, recovering well in Newfoundland and Labrador since the peak season 2022. However, a fair share of travellers are still catching up on trips they had to postpone due to the pandemic. Interestingly, 15% of vacation visitors indicated that their 2023 Newfoundland and Labrador trip was one which they had previously postponed due to the pandemic. Similarly, 11% respectively of VFR visitors and conference visitors were catching up on postponed trips, as did 6% of business visitors. Overall, 12% of all non-resident visitors during the peak season 2023 were making up for previously postponed trips, with older age segments, in particular those 65 years and older, much more likely to do so than younger age segments.

Visitors from British Colombia were the most likely to be making up for a postponed trip (19%), followed by visitors from the United States (15%) and Alberta (14%). Likely in part due to the “Atlantic travel bubble”, Maritimers (8%) were the least likely to indicate that their current trip was one postponed because of the pandemic.

SEASONALITY

Visitation by Season (% parties)



At 45%, most visitors to Newfoundland and Labrador during the May to October period came in the summer months of July and August. Visitation in the spring and fall was similar, with 27% of visitors coming in May and June, and 28% visiting in September and October.

Trip seasonality varies by trip purpose, with vacation visitors more likely to visit during July and August (52%) compared to visitors overall (45%). Similarly, nearly half of those in the province to visit friends and relatives (49%) came during July and August. Business visitors, however, are less likely to visit during the peak summer months (25%), with a higher share visiting in the spring (43%) and fall (33%) months.

Most notably, visitors from the United States were much less likely to visit in the spring compared to other markets, with only 20% doing so. In contrast, 31% respectively of Maritime and Quebec residents visited Newfoundland and Labrador in the spring.

PARTY SIZE AND PARTY COMPOSITION

Overall	Air Visitors	Auto Visitors
1.9	1.8	2.2

Average travel party size is 1.9

Overall, the average party size was 1.9 individuals, up just slightly from 2016 (1.8). At 1.8, the average party size of air travellers is notably lower than that of auto parties at 2.2.

Vacation	VFR	Business	Conference
2.2	1.8	1.4	1.5

At 2.2 individuals, the average party size of vacation visitors is larger than those travel parties with other trip purposes. While the party size of VFR and conference visitors remained similar to 2016, the party size of business travellers increased slightly from 1.2 but staying the lowest compared to other trip purposes.

Party Composition (% parties)

Party Composition	Overall	Vacation	VFR	Business	Conference
Alone	**42%**	23%	46%	76%	60%
Spouse/partner only	**30%**	44%	28%	7%	22%
Spouse/partner	**9%**	11%	10%	1%	2%
Child/children under 12 years	**6%**	5%	9%	1%	0%
Child/children ages 12 to 17	**4%**	4%	5%	1%	1%
Child/children over 18 years	**3%**	3%	4%	<1%	2%
Parent(s)	**5%**	5%	6%	1%	3%
Grandparent(s)	**<1%**	<1%	1%	0%	0%
Other family member(s)	**6%**	8%	7%	1%	3%
Friend(s)	**7%**	13%	3%	2%	8%
Business associates/colleagues	**2%**	<1%	0%	12%	4%

Most visitors travel solo, vacation visitors as couples

Overall, most visitors to Newfoundland and Labrador travelled solo. This is driven by business (76%) and conference (60%) visitors, with nearly half of those visiting friends and family (46%) also travelling alone. This compares to just 23% of vacation visitors who came to the province as solo travellers.

Just under one third of visitors (30%) travelled with a spouse/partner only, with nearly half of vacation visitors (44%) and 28% of VFR visitors doing so. Notably, at 22%, conference visitors were more likely to travel with a partner or spouse rather than business associates or colleagues (8%). At 7%, travelling with a spouse/partner only was not common among business visitors.

Generally, visitor travel parties comprised a variety of members, most commonly spouses/partners, children under 12 and other family members, especially among vacation and VFR travellers. Travelling with friends was also popular, particularly among vacation (13%) and conference (8%) visitors. When not travelling alone, business visitors were most likely to travel with business associates or colleagues (12%).

LENGTH OF STAY

Overall	Air Visitors	Auto Visitors
11.5 nights	10.6 nights	15.3 nights

Vacation	VFR	Business	Conference
10.8 nights	12.5 nights	9.9 nights	5.3 nights

Visitors stay an average of 11.5 nights in Newfoundland and Labrador

Non-resident visitors stayed, on average, 11.5 nights in the province, slightly longer than the 10.8 nights reported in 2016. The length of stay varied greatly by trip purpose: it was longest for VFR travel parties at 12.5 nights while vacation visitors stayed an average of 10.8 nights. Business visitors averaged 9.9 nights in the province, with conference travel parties staying just 5.3 nights.

The overall increase in length of stay compared to 2016 is driven by increases in the length of stay of both vacation (10.8 nights up from 10.4) and VFR travellers (12.5 nights up from 11.6).

Average Length of Stay by Trip Purpose and Mode of Transportation (Nights)

Trip Purpose	Overall	Air	Auto
All Purposes	**11.5**	**10.6**	**15.3**
Vacation	10.8	9.9	13.3
VFR	12.5	12.2	13.9
Business	9.9	8.8	26.8
Conference	5.3	5.0	**

** not reported due to small sample size

At 15.3 nights, auto travel parties had significantly longer stays in Newfoundland and Labrador, on average, than those visiting by air at 10.6 nights. Both air and auto visitors stayed slightly longer in 2023 than in 2016. (10.0 / 15.1 in 2016). With the exception of VFR, the length of stay for auto visitors for all other purposes is considerably longer than the length of stay for respective air visitors. Most notably, business visitors travelling by auto (26.8 nights) stay three times longer than business visitors by air (8.8 nights). At 13.3 nights, vacation visitors travelling to the province by auto stayed over three nights longer than those travelling by air. Auto travellers visiting friends and relatives stayed 13.9 nights, just under two nights longer than VFR parties travelling by air – the smallest difference between air and auto visitors compared to other trip purposes.

Compared to 2016, the length of stay increased slightly for air visitors for all purposes while trip length for VFR (15.1 in 2016) and business visitors (32.1 nights in 2016) travelling by auto decreased. At 13.3 nights, auto travellers visiting for vacation stayed slightly longer in 2023 than in 2016 (12.2 nights).

Average Length of Stay by Region

Labrador	Western	Central	Eastern	Avalon	St. John's Area
3.3 nights	6.4 nights	5.4 nights	4.5 nights	6.6 nights	5.7 nights

The average length of stay varied by region, with the Avalon and Western regions recording the longest stays at 6.6 and 6.4 nights respectively. Visitors stayed more than five nights in both the Central region (5.4) and the St. John's area (5.7). At 4.5 nights and 3.3 nights respectively, stays were somewhat shorter in the Eastern region and in Labrador.

LENGTH OF STAY

Average Length of Stay by Origin 2023 v. 2016 (Nights)

Origin	Nights		Origin	Nights	
	2023	2016		2023	2016
Overall	**11.5**	10.8			
Maritimes	**9.3**	9.8	**British Columbia**	12.9	12.1
Quebec	**9.5**	9.7	**Other Canada**	12.7	12.8
Ontario	**11.3**	9.5	**United States**	11.2	10.1
Alberta	**14.6**	15.0	**Other Country**	18.0	14.6

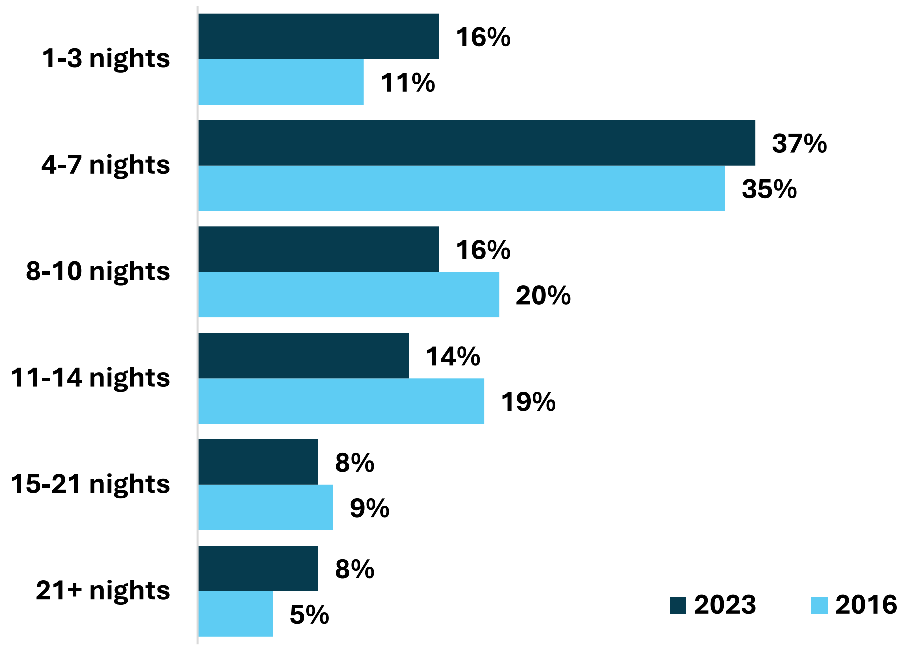
International visitors average the longest stays in Newfoundland and Labrador

The average length of stay in Newfoundland and Labrador varied depending on visitor origin. Most notably, visitors from overseas averaged the longest stays at 18 nights, 3.5 nights longer than in 2016 (14.6). Visitors from Alberta stayed 14.6 nights, while visitors from British Columbia stayed 12.9 nights on average. Visitors from the rest of Canada (Prairies and Territories) averaged 12.7 nights in the province. The length of stay for visitors from the western regions of Canada was similar to 2016.

Visitors from Ontario and the United States had comparable trip lengths at 11.3 nights and 11.2 nights respectively, and both increasing compared to 2016. Stays for Ontario residents were 1.8 nights longer in 2023, while stays for US visitors were 1.1 nights longer than in 2016.

Visitors from the Maritimes and Quebec had relatively shorter stays in Newfoundland and Labrador compared to other visitors. Maritimers averaged 9.3 nights in the province while Quebec visitors stayed 9.5 nights, both recording slightly shorter stays than in 2016.

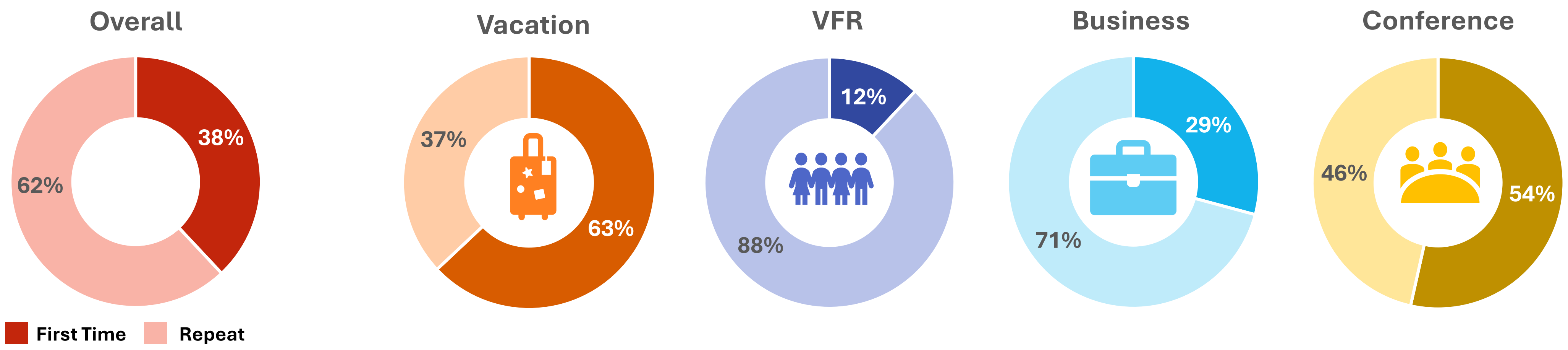
Length of Stay by Number of Nights (% parties)



Stays of one week or less dominate

In terms of length of stay by number of nights, over half of visitors (53%) stayed a week or less in the province, with 16% of visitors staying 1 to 3 nights and over one third (37%) staying 4 to 7 nights. Sixteen percent of visitors stayed between 8 and10 nights, while 14% stayed 11 to 14 nights. Eight percent of visitors had longer stays of 15-21 nights, with another 8% staying 21 nights or longer. Compared to 2016, more visitors reported shorter stays of 1 to 3 nights (16% compared to 11%). At the same time, a higher share of visitors reported staying for 21 nights or longer (8% compared to 5%).

Share of First Time and Repeat Visitors (% Parties)



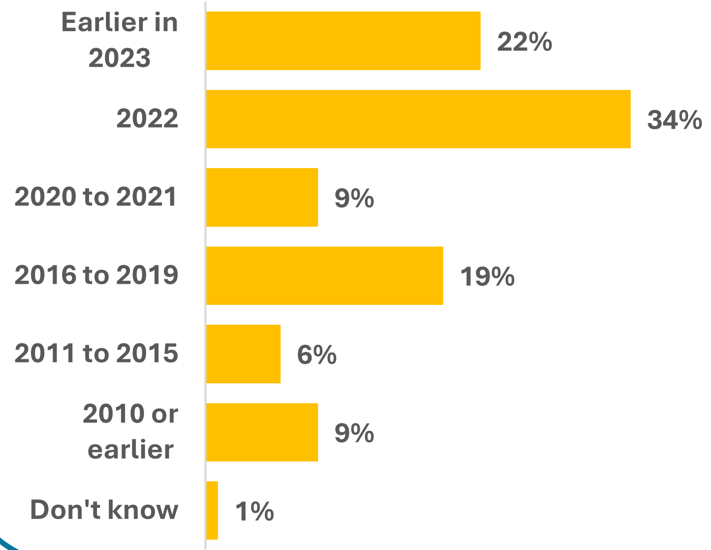
Share of repeat visitation varies greatly by trip purpose

Overall, six in ten visitors (62%) to Newfoundland and Labrador were repeat visitors, while 38% visited for the first time in 2023. The share of repeat and first-time visitation varies considerably by trip purpose, with vacation (63%) and conference (54%) visitors much more likely to be visiting for the first time. The vast share of VFR visitors (88%) and of those visiting for business (71%) have had previous visits to the province. Compared to 2016, the share of first-time visitors increased slightly overall from 35% to 38% but decreased marginally among *vacation* visitors, from 65% to 63%.

First-time visitors also differ by origin, with those visiting from the United States being the most likely to be first time visitors, as 60% of them indicated that they were in the province for the first time in 2023. Fifty-seven percent of visitors from other countries were also first-time visitors as were 55% of visitors from Quebec.

Driven by the varying shares of first and repeat visitors by trip purpose, first-time visitors travelled in slightly larger travel parties (2.2 individuals) than repeat visitors (1.9) and had shorter stays at 9.0 nights compared to repeat visitors' 10.9 nights.

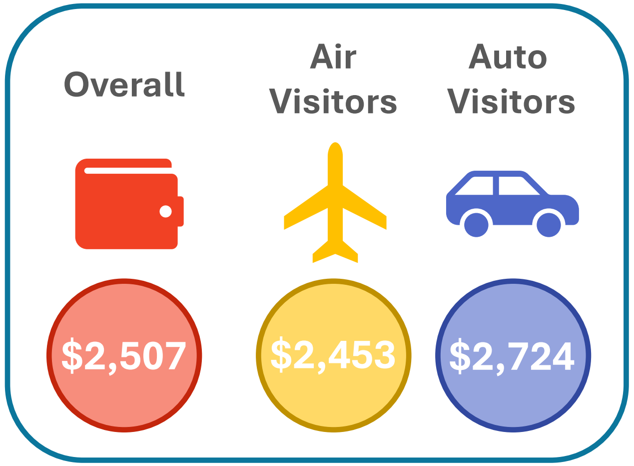
Timing of Last Visit to Newfoundland and Labrador (% parties)

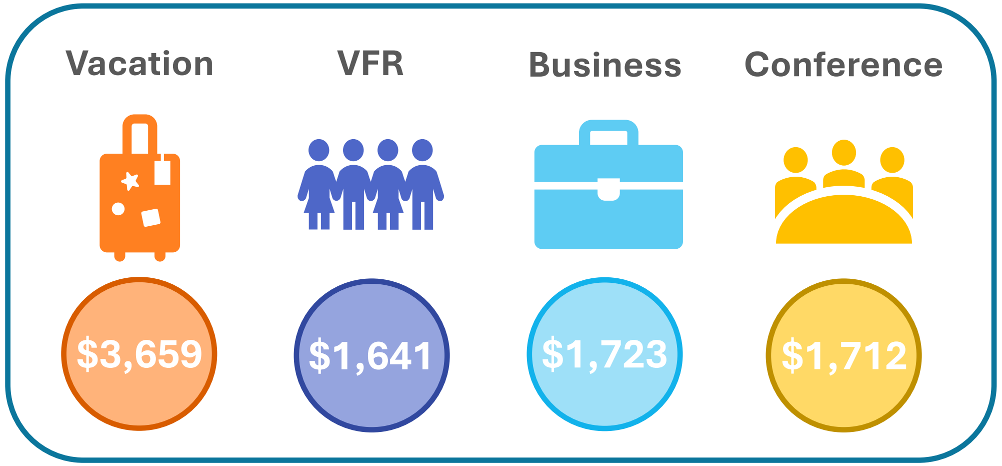


Repeat visitors were asked when they last visited Newfoundland and Labrador. Nearly one quarter of repeat visitors (22%) said they had visited earlier in 2023, while a third (34%) had visited in 2022. Another 9% indicated that their last trip was in 2020 or 2021. Nearly one in five repeat visitors (19%) had visited between 2016 and 2019, while 6% had visited between 2011 and 2015. One in ten repeat visitors (9%) had last visited in 2010 or earlier.

TRIP EXPENDITURES

Vacation visitors spend the most per travel party; business visitors have highest visitor yield





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 $2,507, with auto travellers ($2,724) reporting slightly higher spending than air travellers ($2,453). Overall average per party spending in 2023 increased compared to 2016 (from $2,095), with inflation during this period playing a major role in driving this increase.

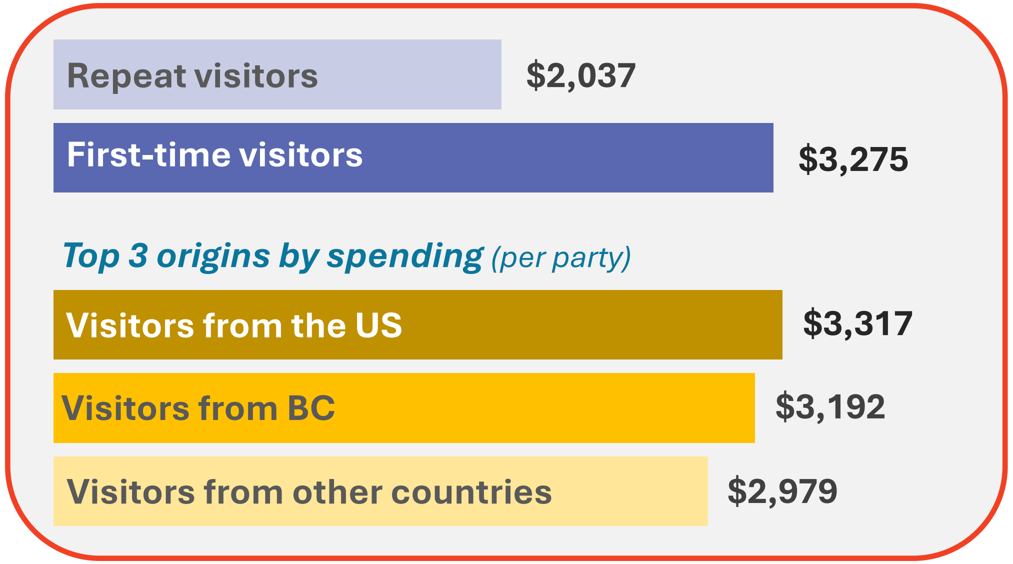
At $3,659 per party, visitors travelling for vacation spent the most during their visit. This compares to $1,641 for VFR visitors, $1,723 for those coming for business reasons and $1,712 for conference visitors.

Average Trip Expenditures by Mode of Transportation and by Purpose

	Per Party	Per Person	Per Person Per Night
Overall	**$2,507**	**$1,299**	**$182**
Air visitors	$2,453	$1,295	$195
Auto visitors	$2,724	$1,317	$129
Vacation	$3,659	$1,651	$204
VFR	$1,641	$905	$101
Business	$1,723	$1,329	$295
Conference	$1,712	$1,196	$269

In addition to average spending *per travel party*, expenditures can also be compared on a *per person* and *per person per night* basis.

Per person per night spend (visitor yield) for visitors overall is $182, with air visitors having a higher per person per night spend. This can be partially attributed to smaller travel parties and shorter stays compared to auto visitors. Conference ($269) and business ($295) visitors have the highest per person per night spend, partially attributable to shorter stays and smaller travel parties compared to vacation and VFR visitors. Vacation visitors have a notably higher average travel party spend ($3,659) and yield ($204) compared to those visiting friends and relatives ($1,641 per party; $101 per person per night).



EXPENDITURE PATTERNS

Visitors spend most of their travel budgets on accommodations

Total party spending can be allocated to a variety of categories, with accommodations accounting for most of the dollars spent by visitors at 36%, while in-province transportation and spending in restaurants account for another 22% and 21% respectively. These three spending categories together represent more than three quarters (79%) of all per party expenditures in the province. Furthermore, 7% of party expenditures are spent on store-bought food and beverages and 6% go towards activities, recreation and experiences. Visitors spent 5% of their total spending in the province on arts, crafts and souvenirs.

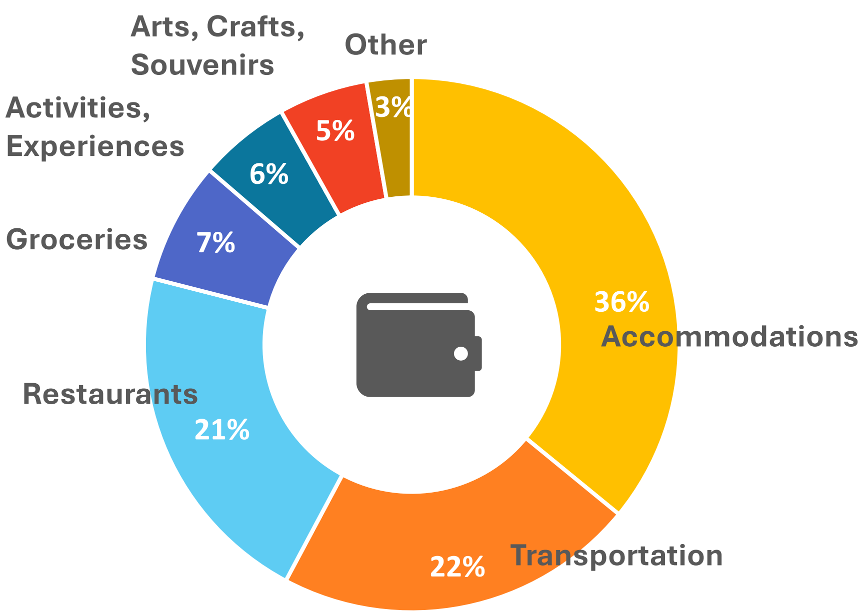
Spending shares by category vary greatly by trip purpose. Most of the money spent in the province by vacation (41%), business (43%) and conference (55%) visitors goes towards accommodations. VFR travellers, due to their tendency to stay with family or friends (unpaid accommodations), spent a lower share on accommodations and more toward restaurants, transportation, groceries, and arts, crafts and souvenirs compared to other visitors.

Expenditure Patterns by Purpose (% of total $$ spent)

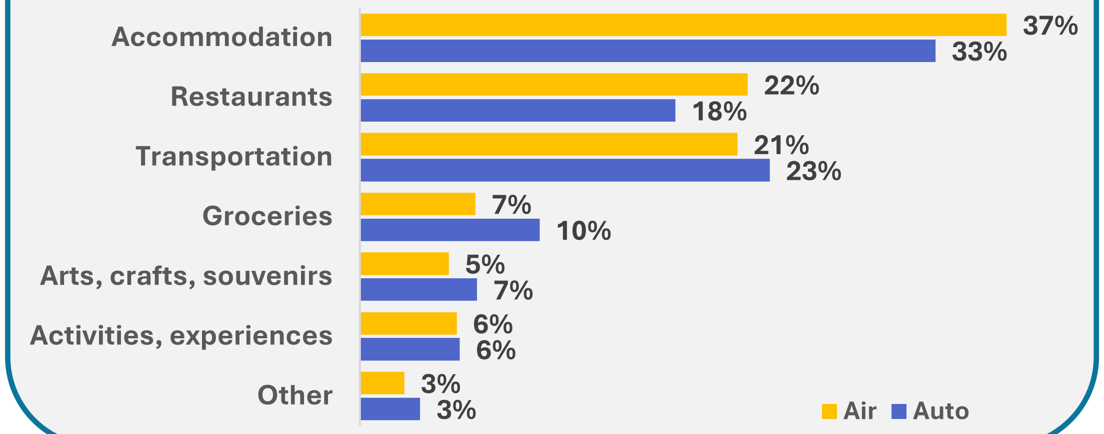
Expenditure Type	Overall	Vacation	VFR	Business	Conference
Accommodation	**36%**	41%	20%	43%	55%
Restaurants	**21%**	21%	23%	21%	23%
Transportation	**22%**	21%	24%	22%	12%
Groceries	**7%**	5%	14%	7%	1%
Arts, crafts, souvenirs	**5%**	5%	8%	2%	6%
Recreation, entertainment	**6%**	6%	5%	3%	2%
Other	**3%**	2%	6%	1%	0%

Compared to 2016, a slightly smaller share of visitors' expenditures went towards accommodations (36% down from 38%), while transportation accounted for a larger share (22% up from 19%). Both vacation (41% down from 43%) and business travellers (43% down from 47%), spent notably less on accommodations in 2023, driving the lower share spent on accommodations overall.

Travel Party Expenditures – Spending Shares by Category



Category Spending Shares by Mode of Transportation



ACCOMMODATIONS

Most visitors stayed in paid accommodations, with hotels/motels being most popular

73%

Of visitors spent at least one night in *paid* accommodations

54%

Of total nights were spent in *paid* accommodations

Nearly three quarters of visitors (73%) spent *at least one night* in paid accommodations during their trip, down slightly from 76% in 2016. More than half of the nights (54%) visitors reported they spent in the province were spent in paid accommodations, also down compared to 2016 when visitors spent 57% of nights in paid accommodations.

More than half of travel parties (53%) stayed in a hotel, motel or resort, with the second largest share of visitors (39%) spending at least one night at a house, apartment, cabin or vacation home owned by their family or friends. Although a larger share of visitors stayed at hotels than with family or friends, the largest share of nights spent in the province was spent with family and friends (37%). This compares to 23% of nights spent in hotels. The share of nights spent with family and friends is also up considerably compared to 2016 (32%). The decrease in use of paid accommodations is likely a reflection of considerably higher accommodation costs compared to 2016 and visitors making adjustments that fit their travel budgets.

Short term rentals such as vacation homes, cabins/cottages, and apartments were also popular, with 20% of visitors staying at least one night in these types of accommodations and accounting for 16% of nights. Another 14% of visitors stayed at bed and breakfasts spending 6% of nights there, while campgrounds at national, provincial or commercial parks were a place to spend at least one overnight for 6% of visitors, accounting for 5% of all nights in the province. A small share of visitors (3%) indicated that they stayed in their own home or cottage while in the province, however, these stays accounted for a much larger share of nearly 1 in 10 nights (7%) spent in the province.

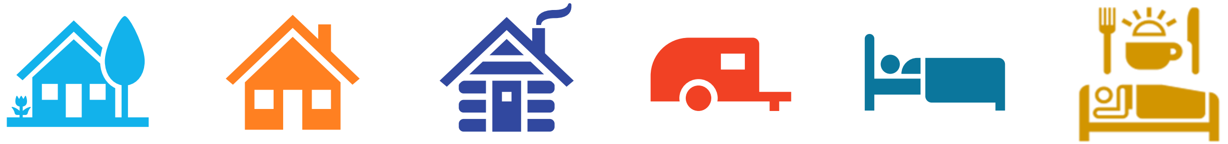
Accommodation Use and Share of Party Nights by Type of Accommodation

Accommodation Type	Share of parties*	Share of nights
Hotel/motel/resort	53%	23%
Dwelling owned by friends/family	39%	37%
Short-term rental (vacation home, cottage, apartment, etc.)	20%	16%
Bed and Breakfast (B&B)	14%	6%
Campgrounds (all types)	6%	5%
Own cottage/cabin or second home	3%	7%
Student residence/university	1%	1%
Commercial outfitting lodge/camp	1%	1%
Hostel	1%	<1%
Other	4%	4%

*Parties who stayed at least one night in type of accommodation

Average Length of Stay in Type of Accommodations (Nights)

Own cottage/ second home	Family/ friends	Short-term rental	Campground	Hotel/motel/ resort	Bed & Breakfast
25.7	9.9	7.9	7.8	4.4	4.4

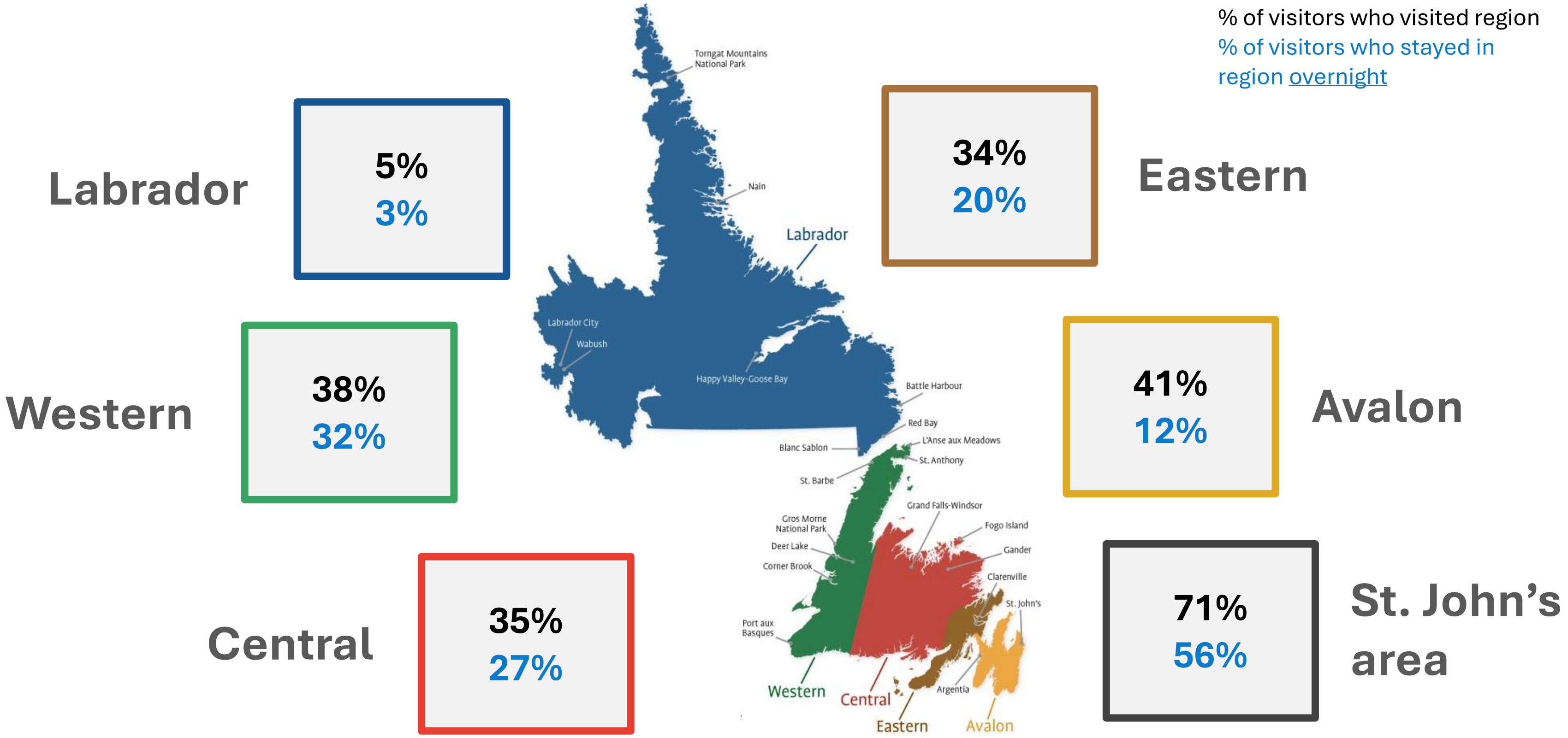


Visitors take in all regions of Newfoundland and Labrador

Visitors continue to travel across the entire province to take in the varied experiences and attractions in all regions. In addition to overnight visitors, both the 2016 and 2023 visitor surveys 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 below. Nearly three quarters of all travel parties (71%) visited the St. John's area while more than two in five travel parties (41%) took in the neighbouring Avalon region. Nearly as many travel parties (38%) visited the Western region, and just over a third of parties each visited the Central (35%) and Eastern (34%) regions of the province. Labrador welcomed 5% of all visitor parties to the province. Regional visits varied considerably by mode of transportation, with auto travellers being much more likely to report visits to the Western, Central and Eastern regions compared to air travellers and much less likely to have visited the St. John's area. Visitation rates to each region are at similar levels as in 2016.

At 56%, the share of visitors staying at least one overnight was highest in the St. John's area. One third of visitors stayed overnight in the Western region while the share of overnight stays was lowest in Labrador (3%) and in the Avalon region (12%). The share of overnight visitors decreased in all regions compared to 2016, particularly in the St. John's area and the Avalon region.

Total and Overnight Visitor Parties to Regions of Newfoundland and Labrador (% parties)



Share of visitors who visited region, by mode of transportation

2023	Air	Auto
St. John's	77%	51%
Avalon	41%	43%
Eastern	31%	45%
Central	30%	59%
Western	29%	77%
Labrador	4%	7%

2016	Visited	Overnight
St. John's	74%	64%
Avalon	42%	19%
Eastern	31%	21%
Central	35%	30%
Western	39%	35%
Labrador	7%	7%

REGIONAL ATTRACTIONS

Visitors spent time at attractions and places across all regions of Newfoundland and Labrador

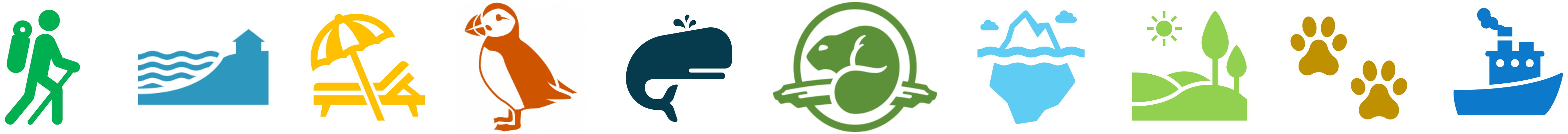
Visitors continued to take in attractions across all regions in the province, including visitor favourites such as Signal Hill, Brigus, Bonavista, Gander, Twillingate, Gros Morne and Red Bay. National Historic Sites as well as Provincial Historic Sites were among some of the most frequented regional attractions while a sizeable share of visitors was taking advantage of the many hiking and walking trails available in each region. Outside of some of the St. John's area attractions, Gros Morne National Park was the most visited attraction in the province.

Regional Attractions/Places Visited (% parties who visited region)

St. John's Area	Avalon Region	Eastern Region	Central Region	Western Region	Labrador
Downtown St. John's (92%)	Brigus (38%)	Bonavista (62%)	Gander (58%)	Gros Morne National Park (69%)	Red Bay (65%)
Signal Hill (75%)	East Coast Trail (30%)	Cape Bonavista Lighthouse (51%)	Twillingate (53%)	Hiking/walking trails (57%)	Point Amour Lighthouse (53%)
Quidi Vidi Village (57%)	Bay Roberts (30%)	Trinity (50%)	Hiking/walking trails (48%)	Corner Brook (54%)	Labrador Coastal Drive (30%)
Cape Spear (54%)	Colony of Avalon (26%)	Elliston (44%)	Terra Nova National Park (30%)	Western Brook Pond (36%)	Hiking/walking trails (30%)
George Street (53%)	Witless Bay Ecological Reserve boat tour (18%)	Clarenville (44%)	Whale watching/ iceberg boat tour (15%)	L'Anse Aux Meadows (27%)	Trans Labrador Highway (26%)
City hiking/walking trails (33%)	Cupids (17%)	Skerwink Trail (23%)	Beaches - Eastport, Sandy Cove (14%)	St. Anthony (25%)	Happy Valley-Goose Bay (22%)
Downtown Pedestrian Mall (31%)	Cape St. Mary's (17%)	Other hiking/walking trails (28%)	Fogo Island / Change Islands (14%)	Port-au-Choix (19%)	Labrador Interpretation Centre (16%)
Petty Harbour (30%)	Castle Hill National Historic Site (11%)	Port Union (14%)	Springdale/King's Point area (10%)	Stephenville/Port au Port area (18%)	Battle Harbour (15%)
The Rooms (27%)	Mistaken Point (11%)	Whale watching/ iceberg boat tour (13%)	Beothuk Interpretation Centre (10%)	Humber Valley/Marble Mountain area (11%)	Churchill Falls/Labrador West (13%)
City parks (23%)	Bell Island (9%)	Marystown (12%)	Beaches - Lumsden, Musgrave Harbour (8%)	Codroy Valley (10%)	Northwest River (8%)

Participation in Outdoor/Recreational Experiences (% parties)

Hiking/ walking	Coastal sightseeing	Visiting a beach	Seabird watching	Whale watching	Visiting a National Park	Iceberg viewing	Visiting other parks	Wildlife viewing	Sightseeing boat tour
60%	45%	31%	28%	28%	27%	22%	20%	17%	13%



Hiking, coastal sightseeing, seabird and whale watching are top outdoor experiences

Hiking and trail walking remain top outdoor experiences for visitors to Newfoundland and Labrador. Sixty percent of visitors hiked/walked on trails during their trip, including 4% who hiked with a guide. Coastal sightseeing was another top activity, with 45% of visitors taking in the province's coastlines. Seabird watching and whale watching were also popular experiences, with 28% of visitors respectively having participated in each, including more than one in ten who took in whales (15%) and seabirds (14%) by boat tour. Visiting beaches (31%), national parks (27%), iceberg viewing (22%), and visiting other parks and ecological reserves (20%) continue to be visitor favourites. Over nine in ten visitors (93%) to the province participated in at least one outdoor activity or experience during their trip.

The rate of participation in activities and experiences generally varies by trip purpose, with vacation visitors significantly more likely than other visitors to take in most types of activities and experiences during their trip. Vacation visitors report higher rates of participation in nearly all outdoor activities and experiences than other visitors, with the exception of ocean fishing (e.g. cod fishing) and ATV touring, both experiences which tend to be more popular among VFR travellers.

Top Outdoor/Recreational Experiences by Mode of Transportation (% parties)

Visitors by Air	Parties
Hiking/walking	60%
Coastal Sightseeing	43%
Visiting a beach	29%
Seabird watching	28%
Whale watching	27%
Visiting a National Park	22%
Iceberg viewing	20%

Visitors by Auto	Parties
Hiking/walking	64%
Coastal Sightseeing	52%
Visiting a National Park	47%
Visiting a beach	40%
Whale watching	32%
Iceberg viewing	31%
Seabird watching	30%

Although top outdoor activities and experiences were similar for both visitors by air and auto, the share of visitors participating in each was generally higher among auto visitors. This is, in part, due to the higher share of vacation visitors among auto travellers as well as access and opportunity to do and see more in their own vehicle.

CULTURE AND HERITAGE EXPERIENCES

Participation in Culture/Heritage Experiences (% parties)

Local cuisine	Exploring small communities	Connecting with locals	Historic sites, museums	Lighthouse experiences	Live music at a local pub	Local brewery, winery, distillery	Visiting galleries, exhibits	Experiencing the nightlife	Live theatre performances
64%	52%	50%	46%	38%	36%	34%	25%	23%	11%

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

Overall, over 96% of visitors participated in cultural/heritage experiences during their trip. Experiencing local cuisine (64%), exploring small/rural communities (52%) and connecting with locals (50%) were the top three experiences taken in by visitors. Nearly half (46%) visited historic sites, museums or interpretation centres. Lighthouse experiences (38%), going to a local pub for live music (36%), visiting local microbreweries/distilleries/wineries (34%), visiting galleries or exhibits (25%), and experiencing the nightlife (23%) were also popular experiences among visitors. Approximately one in ten visitors attended live theatre or other live performances (11%), experienced Indigenous culture, traditions or history (10%), visited archeological sites (9%) or attended a music festival or concert (8%) during their stay. Fewer visitors participated in special programming at an attraction (6%), attended food/drink themed festivals (4%), sporting events/tournaments (3%) or craft workshops (1%).

Vacation visitors were more likely to take in a range of cultural activities and experiences compared to visitors travelling for other purposes. Most notably, they were much more likely to experience nature/history at a lighthouse, visit historic sites, explore rural communities, visit galleries and exhibits, and visit a local brewery, distillery or winery.

Top Culture/Heritage Experiences by Mode of Transportation (% parties)

Visitors by Air	Parties
Experiencing local cuisine	65%
Connecting with locals	50%
Exploring small communities	49%
Historic sites, museums	46%
Live music at a local pub	38%
Lighthouse experiences	37%
Local brewery/winery/distillery	35%

Visitors by Auto	Parties
Exploring small communities	62%
Experiencing local cuisine	60%
Connecting with locals	54%
Historic sites, museums	49%
Lighthouse experiences	42%
Local brewery/winery/distillery	30%
Live music at a local pub	29%

Top culture and history experiences were similar for both visitors by air and auto, with auto visitors more likely to explore small communities, experience lighthouses, connecting with locals and visit historic sites. A higher share of air visitors took in live music at a local pub, culinary experiences as well as local breweries, wineries or distilleries.

ACTIVITIES AND EXPERIENCES

Participation in Outdoor/Recreational Experiences (% parties)

	Overall	Vacation
Hiking/walking on trails - total	**60%**	74%
Hiking/walking on trails - general	*60%*	*72%*
Hiking/walking on trails - guided	*4%*	*7%*
Coastal sightseeing	**45%**	56%
Whale Watching (NET)	**28%**	43%
Whale watching – from land	*18%*	*26%*
Whale watching – from boat tour	*15%*	*27%*
Seabird watching (puffins, gannets, murres, etc.) (NET)	**28%**	47%
Seabird watching – from land	*20%*	*34%*
Seabird watching – from boat tour	*14%*	*24%*
Visiting a beach	**31%**	32%
Visiting a national park	**27%**	47%
Iceberg viewing	**22%**	36%
Visiting other parks/ecological reserves	**20%**	33%
Wildlife viewing (on my own)	**17%**	25%
Sightseeing boat tour	**13%**	25%
Geological tour/fossil observation	**10%**	17%
Ocean fishing (i.e. cod fishing)	**8%**	7%
All-terrain/Utility Vehicle (ATV/UTV) Touring	**6%**	3%
Birdwatching (birding/other than seabirds)	**4%**	5%
Canoeing/kayaking/rafting	**4%**	5%
Visiting a botanical garden	**4%**	5%
Angling (fresh water)	**3%**	3%
Golfing	**3%**	2%
Mountain biking/cycling/fatbiking	**2%**	2%
Wildlife viewing/birdwatching with a guide/at a nature park	**1%**	2%
Hunting (big game – bear, moose, caribou)	**1%**	3%
Hunting (small game – hare, grouse)	**<1%**	<1%
Rented an e-bike	**<1%**	1%
None of these	**7%**	1%

Participation in Cultural/Heritage Experiences (% parties)

	Overall	Vacation
Experiencing local cuisine	**64%**	69%
Exploring small/rural communities	**52%**	67%
Interacting/connecting with locals	**50%**	57%
Historic sites/museums/interpretation centres	**46%**	67%
Lighthouse experiences	**38%**	60%
Visiting a local pub to experience live music	**36%**	43%
Visiting a local microbrewery, distillery, or winery	**34%**	43%
Visiting galleries/exhibits	**25%**	36%
Experiencing the nightlife	**23%**	23%
Attending theatre/other live performances	**11%**	17%
Experiencing Indigenous culture/traditions/history	**10%**	15%
Visiting archeological sites (interpretative tour/ hands-on dig)	**9%**	18%
Attending a music festival/concert	**8%**	10%
Participated at a special program at an attraction/site	**6%**	8%
Attending a food/drink themed festival (e.g. Roots, Rants and Roars; Brigus Blueberry Festival, etc.)	**4%**	4%
Participating in local culinary tours/activities (e.g. foraging, food tours)	**3%**	3%
Attending/participating in a sports event/tournament	**3%**	2%
Participating in craft workshop (painting, pottery, boatbuilding, etc.)	**1%**	1%
None of these	**4%**	1%

VISITOR SATISFACTION

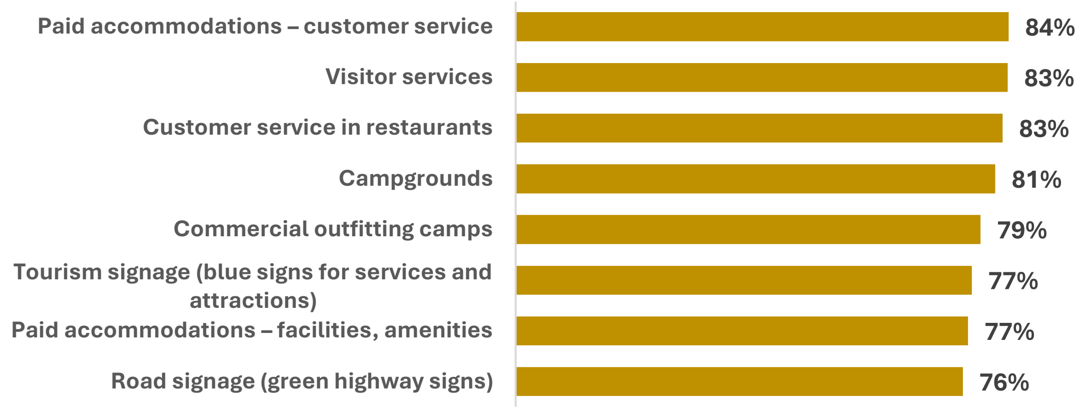
Visitor Satisfaction (* % rating item 8-10 on a 1-10-point scale)

Overall satisfaction with this trip*	Would return to NL in the future	Would recommend NL to others	Value for Money*
91%	92%	90%	68%

91% of visitors are highly satisfied with their Newfoundland and Labrador trip

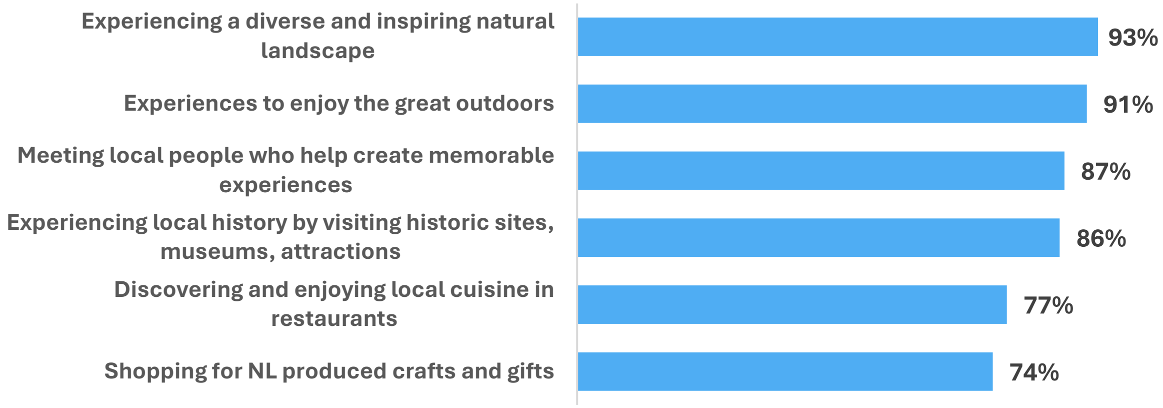
Overall, visitors to Newfoundland and Labrador showed high levels of satisfaction with most aspects of their trip, with 91% highly satisfied with their trip overall. Based on their current trip experience, 92% would return in the future, while 90% would recommend the province as a vacation destination to others. More than two thirds of visitors (68%) were very satisfied with the value for money they perceived for their trip.

Visitor Satisfaction - *Services* (% rating item 8-10 on a 1-10-point scale)



Customer service in paid accommodations (84%) and restaurants (83%) received high levels of satisfaction, with a vast majority of visitors indicating that they were highly satisfied with these services. Visitor services, including Visitor Information Centres (VICs) and Newfoundland and Labrador Tourism's Welcome Desk initiatives, ranked highly as well, with 83% of visitors very satisfied. Satisfaction with campgrounds was also high at 81%, while visitors rated the facilities and amenities at paid accommodations somewhat lower at 77%. As in 2016, visitor satisfaction with tourism signage (77%) and road signage (76%) was among the lowest.

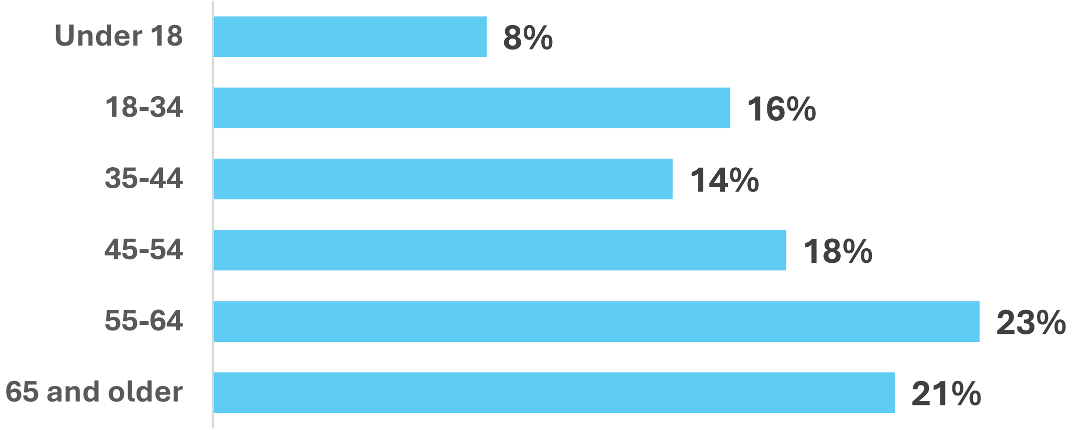
Visitor Satisfaction - *Experiences* (% rating item 8-10 on a 1-10-point scale)



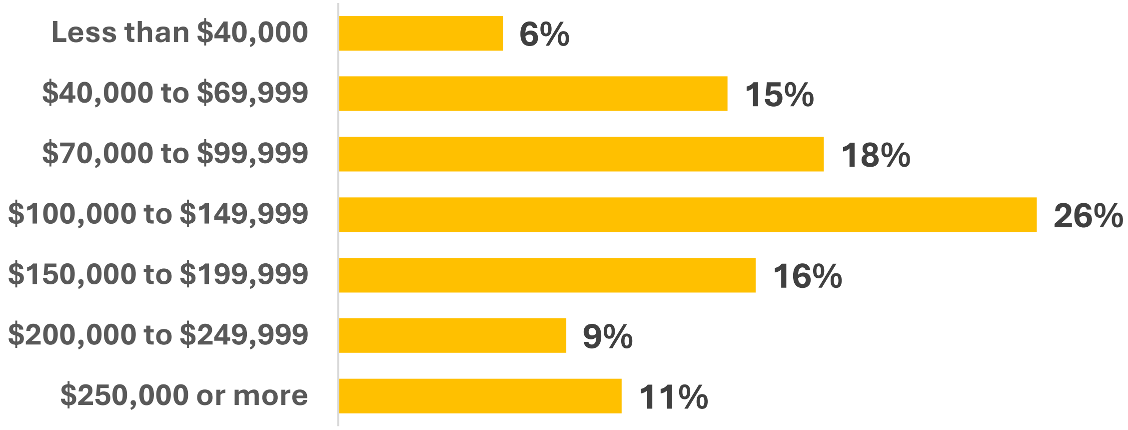
Satisfaction with experiences was generally very high, with 8 to 9 in 10 visitors indicating that they were highly satisfied with experiencing Newfoundland and Labrador's diverse landscape, the great outdoors, meeting locals, and taking in local history at historic sites, museums and cultural attractions. Visitors' satisfaction with experiencing local cuisine and shopping for Newfoundland and Labrador arts and craft products was slightly lower at 77% and 74%, respectively. Overall, visitors' satisfaction with their trip experiences in the province remained at similar levels as in 2016.

VISITOR DEMOGRAPHICS

Visitor Age (% visitors)



Visitor Household Income (% visitors)



Most visitors to Newfoundland and Labrador are 45+

Just under half of visitors to Newfoundland and Labrador were 55 years or older, including nearly one quarter (23%) who were between 55 and 64 and 21% who were aged 65 or older. Another 18% were between the ages of 45 and 54. Thirty percent of visitors were between 18 and 44, including 14% between 35 and 44 and 16% between 18 and 34. Just under one in ten visitors (8%) were under the age of 18.

While the share of young visitors (under 18) to the province has remained at the same level as in 2016, there were some notable shifts in the shares of some age segments. Compared to 2016, a higher share of visitors were 18 to 44 (30%, up from 25%).

Visitor Age 2023 v. 2016 (% visitors)

	2023	2016
18-44 (total)	**30%**	25%
45+ (total)	**62%**	68%
55+ (total)	**44%**	47%

Fewer visitors were 45 or older, with the share of these visitors decreasing to 62% from 68% in 2016. Most notably, the share of visitors 55-64 declined to 23% from 27% while one in five visitors were 65 or older (21%), with the share of this age group remaining at the same level as in 2016 (21%).

Most visitors have above average household incomes

As in 2016, most visitors to the province reported comparatively high household incomes, with 61% earning $100,000 or more, including 20% reporting household incomes of $200,000 or more. Two in five travel parties reported incomes of less than $100,000, including 18% of visitors earning between $70,000 to $99,999 and 15% earning between $40,000 to $69,999. Just 6% of visitors indicated a household income below $40,000.

Considering salary gains over the past few years, it does not surprise that visitors reported higher household incomes than in 2016. While just over half of visitors had incomes of $100,000 or higher in 2016, their share grew to 61% in 2023.

Visitor Household Income 2023 v. 2016 (% visitors)

	2023	2016
$100,000 or more (total)	**61%**	53%
$150,000 or more (total)	**35%**	28%
$200,000 or more (total)	**20%**	n/a

The share of those reporting incomes of $150,000 or more increased from 28% in 2016 to over one third (35%) in 2023. The 2023 survey provided additional categories for reporting higher incomes, showing that 20% of visitors have incomes of $200,000 or more.