

2016 EXIT SURVEY – VACATION VISITOR PROFILE



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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 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

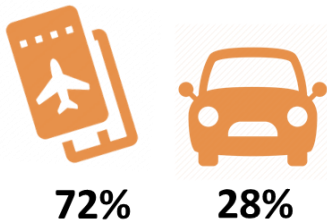
	Air Jan–Apr / Nov–Dec	Air May–Oct	Auto May–Oct	Total
Personal Interviews	4,223	16,188	3,382	23,793
Main Surveys	984	4,008	1,540	6,532

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 ***Vacation Visitor Profile*** focus on the peak travel season May to October.

MODE OF TRAVEL

This **Vacation Profile** focuses on non-residents who visited Newfoundland and Labrador for vacation during the peak travel season of May to October. It is estimated that a total of **70,172 non-resident vacation travel parties** visited Newfoundland and Labrador during the May to October period, representing a total of 153,037 visitors.



Most non-resident parties visiting Newfoundland and Labrador in 2016 travelled to the province for vacation (34%). Air travel to the province among vacation visitors continues to dominate, with more than 7 in 10 (72%) vacation parties travelling by air. This compares to an overall 84% share of air travellers among all visitors to the province.

The share of vacation air travel parties increased since the last survey in 2011 when 67% 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 1.6 million seats and giving visitors more options to access Newfoundland and Labrador. However, at 58%, auto travellers are much more likely to visit for vacation, while only 29% of air travellers are vacation visitors.

Table 2: 2016 Non-Resident Visitor Parties – Trip Purpose by Mode (% 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%

When choosing their mode of travel, air and auto vacation travellers have different motivations. Most visitors who chose to fly to the province were motivated to do so by a desire to save time, allowing them to spend more time in the province. Distance, a general preference for air travel, convenience, and saving money were also factors in the decision to fly. Auto visitors, on the other hand, were largely motivated to drive to the province by the flexibility it affords them - the ability to set their own schedule and to do and see more.

Chart 1: 2016 Non-Resident Vacation Parties – Air and Auto Traveller Motivations (May to October)



Air Vacation Traveller Motivations



Auto Vacation Traveller Motivations



VISITOR ORIGIN

40% of vacation visitors to Newfoundland and Labrador are from Ontario

Chart 2 shows the origin of visitors who come to the province for vacation. As in 2011, Ontario remains the province's largest source market, accounting for four in ten vacation travel parties. One in five vacation parties are from the other provinces west of Ontario and the Territories, representing the second largest share of vacation visitors. Residents of the Maritimes represented 15% while Quebec accounted for another 6%.

In terms of international markets, 13% of vacation parties are from the United States, while 6% are from other countries. International visitation is strongest from the UK, Germany and Australia. Compared to 2011, vacation visitor origin is largely unchanged.

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

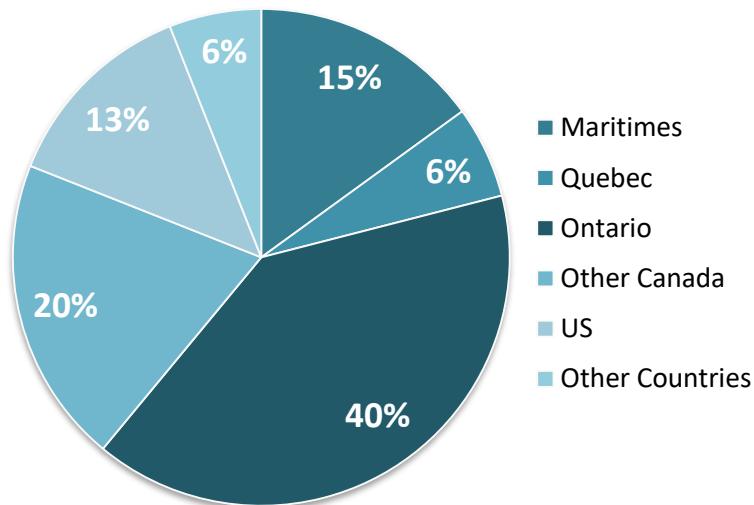


Table 3 highlights the differences in origins between air and auto travel segments. At 44%, vacation visitors from Ontario represent nearly half of all vacation parties travelling by air. Vacation parties from Other Canada* comprise a significantly greater share of air travelers (23%) than auto travelers (13%). While vacation parties from Ontario also represent the largest share of auto travelers (30%), they are followed closely by visitors from the Maritimes (27%).

Vacation visitors from Quebec (10% vs. 4%) and the United States (17% vs. 11%) are much more likely to drive than to fly to the province, whereas overseas vacation parties are more likely to fly (8%) than drive (4%).

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

Origin	Overall	Vacation	Vacation Air	Vacation Auto
Maritimes	26%	15%	10%	27%
Quebec	5%	6%	4%	10%
Ontario	34%	40%	44%	30%
Other Canada	20%	20%	23%	13%
United States	8%	13%	11%	17%
Other Countries	6%	6%	8%	4%

*Other Canada origins include Manitoba, Saskatchewan, Alberta, British Columbia, Yukon, Northwest Territories and Nunavut

FIRST TIME & REPEAT VISITORS

The majority of vacation travel parties are visiting for the first time

Table 4 shows the rates of repeat and first time visitation for vacation travel parties to the province. Compared to visitors overall, vacation parties are much more likely to be visiting the province for the first time (65% vs. 35%). At 67%, vacation visitors by air in particular are very likely to be in the province for their first visit while over 6 in 10 auto travel parties are also new to the province. There has been a noticeable increase in first time vacation visitation over 2011 when 60% of vacation parties were first time visitors, with both air and auto first-time vacationers increasing by 6 and 4 percentage points respectively.

Table 4: 2016 Non-Resident Vacation Parties – Repeat and First Time Visitors (% Parties; May to October)

	Overall	Vacation	Vacation Air	Vacation Auto
Repeat	65%	35%	33%	37%
First time	35%	65%	67%	62%

PARTY SIZE

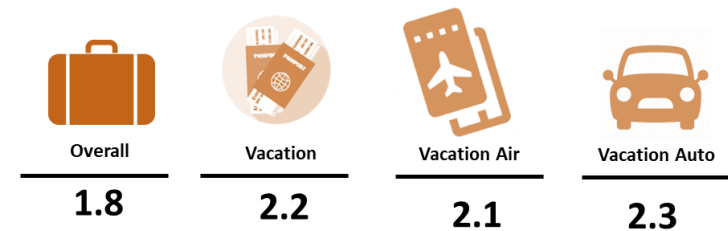
The average vacation travel party size is 2.2

The average party size of vacation visitors was **2.2** individuals, unchanged from 2011, and larger than the average travel party size of 1.8 for visitors overall. At 2.3, the average party size of vacation visitors travelling by auto is slightly higher than that of air parties at 2.1.

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

Chart 3: 2016 Non-Resident Parties – Average Vacation Party Size by Mode (May to October)



PARTY COMPOSITION

Over half of vacation visitors to Newfoundland and Labrador travel as couples

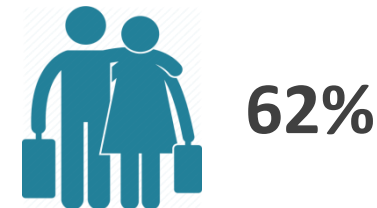
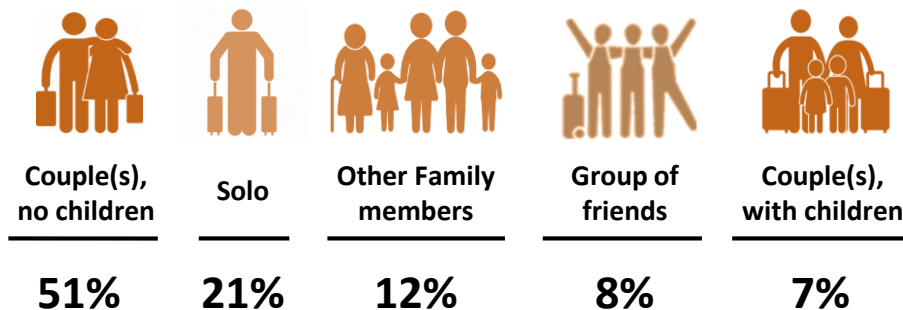
While overall visitation to the province is dominated by solo travellers, just over half of vacation parties travel as couples with no children. At 51%, parties travelling for vacation are much more likely to travel as couples and significantly less likely to be travelling solo (21% vs. 47%). Compared to 2011, more of the province's vacation visitors are now travelling as couples (51% vs. 45%). As well, the share of couples travelling with children increased to 7% from 4% in 2011 while travel with other family members decreased from 17% to 12%. At 21%, slightly fewer vacationers are travelling solo, down from one quarter in 2011.

For both air and auto vacation visitors, the share of parties travelling as couples without children is considerably higher than any other form of travel party. Whereas nearly one quarter of air travellers vacation in the province solo, just over one in 10 auto vacation parties travel by themselves.

Table 6: 2016 Non-Resident Vacation Parties – Party Composition (% Parties, May to October)

Party Composition	Overall	Vacation	Vacation Air	Vacation Auto
Solo	47%	21%	24%	13%
Couple(s), no children	30%	51%	49%	59%
Couple(s), with children	6%	7%	6%	9%
Other family	10%	12%	13%	10%
Group of friends	4%	8%	8%	8%
Business Associates	2%	<1%	<1%	<1%

Chart 4: 2016 Non-Resident Vacation Parties – Party Composition (% Parties, May to October)



***First time* vacation visitors are even more likely to travel as couples without children**

LENGTH OF STAY

Vacation visitors stay for an average of 10.4 nights during their trip to Newfoundland and Labrador



During the May to October period, non-resident vacationers, on average, stay 10.4 nights in the province, slightly less than visitors overall who spend 10.8 nights. Vacation parties traveling by auto stay considerably longer in the province at 12.2 nights, compared to 9.7 for air vacation parties.

At 10.4 nights, vacation visitors spent less time in the province in 2016 than in 2011 (12.2 nights), in line with the global trend of travellers taking generally shorter trips. With over one third of vacation visitors staying just 4 to 7 nights (see **Chart 6**), many travellers commented that they did not have enough time to take in all the attractions and experiences they had planned creating potential for repeat visits in the future.

Table 7: 2016 Non-Resident Vacation 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

Chart 5: 2016 Non-Resident Vacation Parties – Average Length of Stay by Origin (Nights; May to October)

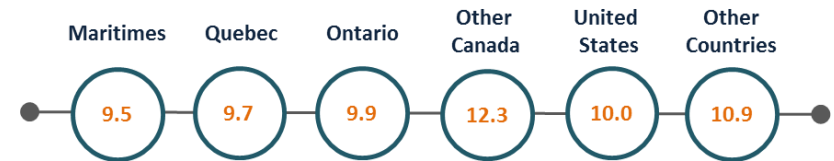
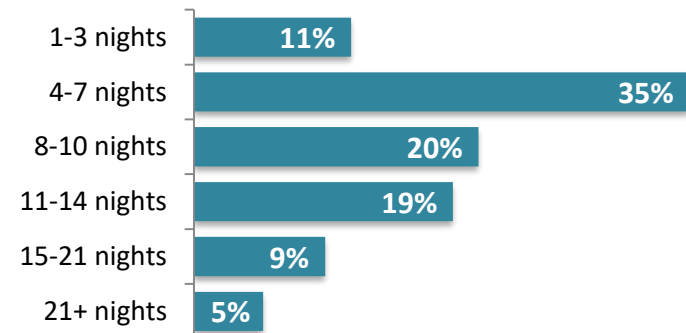


Chart 5 above shows the average length of stay of vacation travel parties by origin. Visitors from Other Canada spend the longest vacations in the province at 12.3 nights. Vacation parties from Other Countries as well as the United States and Ontario also have relatively long stays at 10.9 and approximately 10 nights respectively. Residents of Quebec and the Maritimes have somewhat shorter vacations in Newfoundland and Labrador at 9.5 and 9.7 nights respectively.

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



EXPENDITURES

Vacation travel parties outspend all other visitors, averaging \$3,470 per trip

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. Vacation parties generally outspend parties visiting for all other purposes. As shown in **Table 8**, at \$3,470 non-resident travel parties in the province for vacation reported higher per party spending than visitors overall. Spending by vacation travel parties increased noticeably from 2011 when they reported per party spending of \$2,573.

Vacation parties travelling by air spent an average of \$3,773 while those travelling by auto spent considerably less, at \$2,600. Both air and auto parties spent more compared to 2011 when they reported average expenditures of \$2,691 and \$2,320 respectfully.

Table 8: 2016 Non-Resident Parties – Average Expenditure by Trip Purpose (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

Table 9 shows that vacation visitors spent \$1,681 *per person*, and \$200 *per person per night* in Newfoundland and Labrador. On a per person per night basis, air vacation travellers spent considerably more than those who travelled by auto, at \$220 per night compared to \$142 per night.

Table 9: 2016 Non-Resident Vacation Parties – Average Expenditures (May to October)

	Overall	Vacation	Vacation Air	Vacation Auto
Average Spend per Party	\$2,095	\$3,470	\$3,773	\$2,600
Average Spend per Person	\$1,169	\$1,681	\$1,818	\$1,287
Average Spend / Person / Night	\$174	\$200	\$220	\$142

Average vacation party expenditures also vary by origin. Vacation parties from the United States (\$3,818) and Ontario (\$3,750) reported the highest in-province spending followed closely by visitors from Other Canada (\$3,617) and Other Countries (\$3,446). Vacationers from the Maritimes and Quebec spent less at \$2,397 and \$2,869 respectively.

\$3,477

First time
vacation visitor
party spending

Chart 7: 2016 Non-Resident Vacation Parties – Average Per Party Expenditure by Origin (May to October)

MARITIMES	QUEBEC	ONTARIO	OTHER CANADA	UNITED STATES	OTHER COUNTRIES
\$2,397	\$2,869	\$3,750	\$3,617	\$3,818	\$3,446

EXPENDITURE PATTERNS

Accommodations account for 43% of vacation visitor party spending

Spending can be attributed to a variety of categories, with accommodations accounting for 43% of the dollars spent by vacation travel parties. This compares to 38% of per party expenditures on accommodations in the province by all visitors. The share of spending on accommodations has also increased noticeably since 2011, when vacation visitors reported spending 36% of their dollars on accommodations.

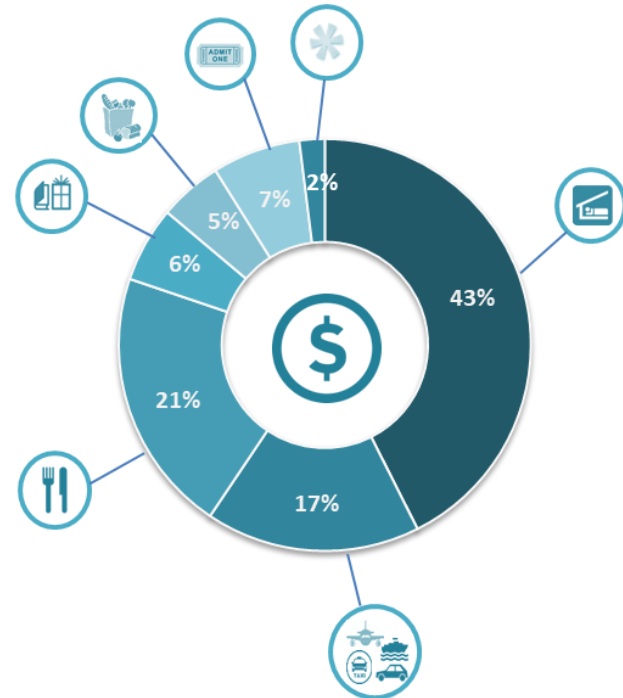
An additional 21% of vacation party expenditures is spent on food and beverages in restaurants, while 17% is spent on transportation. Transportation costs comprise, for the most part, vehicle operating costs such as vehicle rental fees, gasoline and maintenance as well as local transportation such as provincial ferry fares and taxis. Spending on activities and experiences accounts for 7% of expenditures followed by spending on arts, crafts and souvenirs and store-bought food and beverages which account for 6% and 5% respectively.

Table 10: 2016 Non-Resident Parties – Per Party Expenditure Patterns (May to October)

Expenditure Type	Overall	Vacation	Vacation Air	Vacation Auto
Accommodations	38%	43%	43%	44%
Restaurants	21%	21%	21%	19%
Transportation	19%	17%	18%	15%
Activities, Experiences	6%	7%	7%	7%
Arts, Crafts, Souvenirs	6%	6%	5%	7%
Groceries	7%	5%	4%	7%
Other	2%	2%	2%	2%

Spending patterns do not differ very much between air and auto vacation parties, with both types of travellers spending most of their dollars on accommodations and restaurants. However, at 18%, the share of transportation costs is somewhat higher for air vacation parties, likely due to the cost of rental vehicles. As well, while air vacationers spend a slightly higher share of their expenditures on restaurants (21% vs. 19%), auto vacationers rely more on store bought groceries (7% vs. 4%).

Chart 8: 2016 Non-Resident Vacation Parties – Travel Party Expenditures Shares by Category (May to October)



ACCOMMODATIONS

Majority of vacationers stay in paid accommodations, with hotels/motels being the most popular

For vacation visitors, hotel/motel stays are by far the most popular, with 71% of vacation parties staying there and 37% of nights being spent there. The share of nights spent in hotels/motels among vacation travellers has also noticeably increased from the 26% reported in 2011. Bed & Breakfasts/Country Inns are also comparatively popular with almost 4 in 10 vacation parties staying in this type of accommodation, spending 20% of nights. Eight percent of nights are spent at commercial cottages, with 20% of vacation parties spending nights there. Another 8% of nights is spent at campgrounds, with 10% of vacation parties pitching a tent or parking an RV at the province's National Parks, Provincial Parks or private campgrounds. Overall, the vast majority of vacation visitors stay in paid accommodations, with 94% of parties doing so, resulting in 85% of nights being spent in paid accommodations.

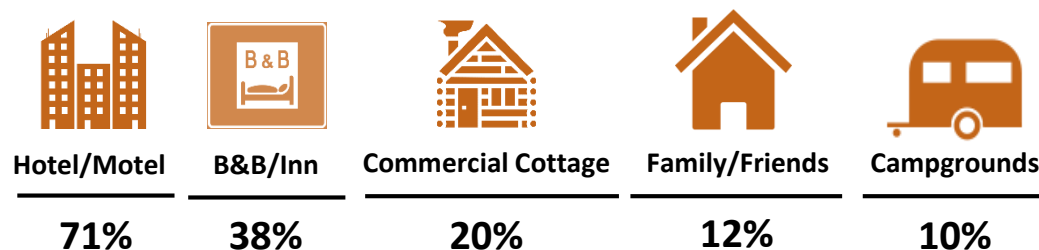
Compared to all visitors, travel parties visiting for vacation were much more likely to stay in B&Bs/Country Inns (19% vs. 8%), and much less likely to stay with family or friends (8% vs. 32%).

Accommodations used by vacation parties also differ by the mode of travel: compared to auto parties, air parties tend to spend a greater share of nights in hotels/motels (40% vs. 27%) and B&Bs/Country Inns (21% vs. 14%). Auto vacation travelers spend a much greater share of nights at campgrounds than air parties (19% vs. 3%).

Table 11: 2016 Non-Resident Vacation Parties – Share of Party Nights by Type of Accommodation (% Nights; May to October)

Accommodation Type	Overall	Vacation	Vacation Air	Vacation Auto
Hotel/Motel	26%	37%	40%	27%
B&B/Country Inns	8%	20%	22%	14%
Commercial Cabins/Cottages	4%	8%	8%	8%
Rented Vacation Home	5%	6%	7%	3%
Apartment/room in private home (not owned by relative/friend)	6%	3%	3%	1%
Campgrounds – All Types	4%	8%	3%	19%
Commercial Outfitting Camps	1%	2%	1%	3%
Houses/Cabins of Relatives/Friends	32%	8%	7%	9%
Own Home/Residence	10%	7%	6%	11%
All Other Types of Accommodation	5%	3%	3%	3%

Chart 9: 2016 Non-Resident Vacation Parties – Share of Parties Using Type of Accommodation (% Parties; May to October)



OVERNIGHT DESTINATIONS

St. John's, the West Coast and the Gander/Twillingate area remain key destinations for vacationers

Table 12: 2016 Non-Resident Vacation Parties – Areas of Province Visited and Stayed at Least One Overnight (% Parties; May to October)

Economic Zone	Overall	Vacation	Vacation Air	Vacation Auto
Zone 1: Rigolet to Nain	0.3%	0.0%	0.0%	0.0%
Zone 2: Labrador West/Churchill Falls	0.3%	0.3%	0.1%	0.9%
Zone 3: Happy Valley/Goose Bay/Northwest River	3.4%	1.7%	1.9%	1.0%
Zone 4: Mary's Harbour to Cartwright	0.5%	0.9%	0.9%	0.9%
Zone 5: Labrador Straits (L'Anse Au Clair to Red Bay)	2.4%	6.0%	7.1%	3.1%
Zone 6: Viking Trail, St. Anthony South West to Plum Point, East to Roddington/Englee	9.9%	23.3%	20.4%	30.9%
Zone 7: Gros Morne Area, Viking Trail North to and including Plum Point	19.8%	45.2%	40.3%	58.2%
Zone 8: Deer Lake/Humber Area	11.4%	18.8%	17.1%	23.4%
Corner Brook/Massey Drive	10.7%	14.5%	10.6%	24.6%
Zone 9: Stephenville/Port-au-Port/Burgeo	4.2%	4.2%	0.9%	12.9%
Zone 10: Port-aux-Basques/Doyles/Rose Blanche	5.0%	10.4%	1.4%	34.3%
Zone 11: Baie Verte/La Scie/Green Bay	3.7%	5.3%	4.5%	7.5%
Zone 12: Grand Falls Windsor Area	7.4%	10.4%	9.0%	14.2%
Zone 13: Bay D'Espoir Area	0.9%	0.3%	0.1%	0.8%
Zone 14: Gander/Twillingate East to Terra Nova	23.5%	42.6%	42.2%	43.8%
Zone 15: Clarenville/Bonavista Peninsula Area	18.8%	37.6%	41.3%	27.9%
Zone 16: Burin Peninsula	3.2%	3.4%	2.8%	5.0%
Zone 17: North West Avalon	7.6%	9.0%	10.0%	6.4%
Zone 18: Argentia/Placentia Area	2.6%	3.9%	4.0%	3.7%
Zone 19: North East Avalon (Excluding St. John's)	7.5%	4.6%	4.7%	4.3%
St. John's	64.2%	71.6%	80.4%	48.2%
Zone 20: Southern Shore Area	4.3%	7.9%	8.9%	5.2%

St. John's, the Gros Morne area as well as the Gander/Twillingate and the Clarenville/Bonavista areas remain the most popular overnight destinations among vacation visitors. Over 70% of vacation parties stayed overnight in St. John's, while almost half reported overnight stays in the Gros Morne area. Over 40% of vacation visitor parties stayed overnight in the Gander/Twillingate area, with nearly 40% overnighing in the Clarenville/Bonavista area.

The areas of Newfoundland and Labrador visited by non-resident vacationers are greatly influenced by how they travel to the province. Over half of auto vacation parties spent at least one night in the Gros Morne area, making it the most popular destination for those travellers, whereas St. John's was most popular with air visitors, with just over 80% of these parties staying there. While air and auto vacationers are equally likely to stay overnight in the Gander/Twillingate area, air vacationers are much more likely to overnight in the Clarenville/Bonavista Peninsula area as well as in the North West Avalon area. Some areas along the West coast are almost exclusive auto overnight stops along the way to or from the Marine Atlantic ferry.

REGIONAL DESTINATIONS

Vacation visitors take in all regions of Newfoundland and Labrador

Travel parties visiting the province for vacation continue to travel to all regions of the province. In addition to overnight visitors, the 2016 visitor survey also captured the share of travel parties who visited certain places and attractions without staying overnight. The total share of vacation parties to a region – regardless of whether they stayed overnight or not – is shown in **Chart 10**.

Nearly eight in ten vacation parties (78%) visited St. John's while over 60% of vacationers visited the Western Region. The Avalon Peninsula attracted 57% of vacationing parties. The Eastern (54%) and Central (55%) Regions were equally popular among vacation visitors, while 1 in 10 vacation parties visited Labrador.

Chart 10: 2016 Non-Resident Vacation Parties – Total and Overnight Visitor Parties to Regions of Newfoundland and Labrador (% Parties; May to October)

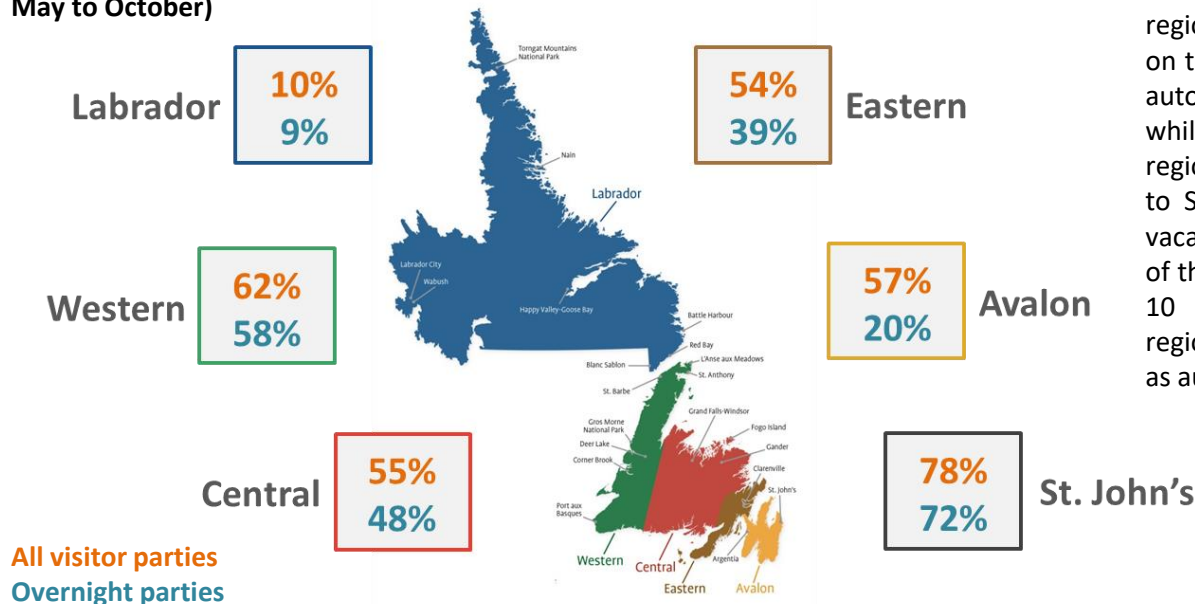


Table 13: 2016 Non-Resident Vacation Parties – Areas of Province Visited (% Parties; May to October)

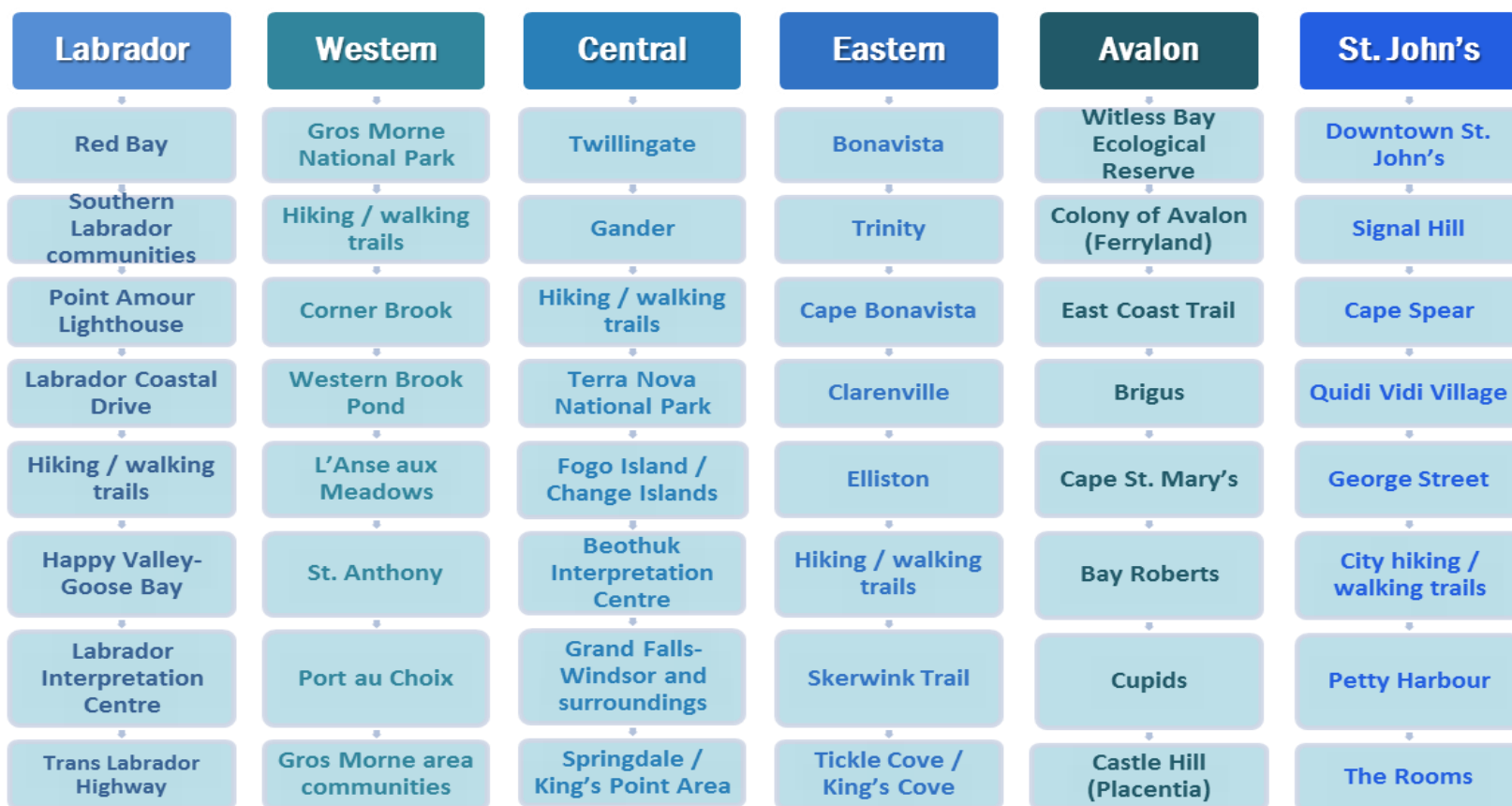
Region	Overall	Vacation	Vacation Air	Vacation Auto
St. John's Area	74%	78%	86%	59%
Avalon Peninsula	42%	57%	62%	43%
Eastern Region	31%	54%	55%	51%
Central Region	35%	55%	52%	64%
Western Region	39%	62%	50%	94%
Labrador	7.5%	10%	12%	6%

The level of overall visitation to the province's regions by vacation visitors is highly dependent on their mode of transportation, with almost all auto parties (94%) taking in the Western region while two thirds visited the neighbouring Central region. Sixty percent of these visitors also came to St. John's whereas the vast majority of air vacation parties (86%) did so. However, only half of them visited the Western region but over 6 in 10 parties visited the neighbouring Avalon region. Air vacation parties were twice as likely as auto vacationers to visit Labrador.

Non-residents in the province for vacation who visited the St. John's area were most likely to visit the Downtown area (94%), followed by Signal Hill (92%), Cape Spear (79%) and Quidi Vidi Village (67%). Vacationers visiting the Avalon region took in the Witless Bay Ecological Reserve (35%), the Colony of Avalon at Ferryland (32%), the East Coast Trail (31%) and Brigus (30%). Popular attractions and communities among visitors to the Eastern region include Bonavista (67%), Trinity (65%), Cape Bonavista (55%) and Clarenville (53%).

Among travel parties who visited the Central region, popular stops included Twillingate (66%), Gander (59%), various regional hiking and walking trails (48%) and Terra Nova National Park (45%). In the Western region, the most visited attraction among vacation visitors was Gros Morne National Park (87%), followed by regional hiking and walking trails (67%), Corner Brook (54%) and Western Brook Pond (53%). Vacation parties visiting Labrador were most likely to stop at Red Bay (75%) and other southern Labrador communities, with the Point Amour Lighthouse (54%) and the Labrador Coastal Drive (38%) rounding out the top regional attractions.

Chart 11: 2016 Non-Resident Vacation Parties – Top Regional Places and Attractions Visited (May to October)



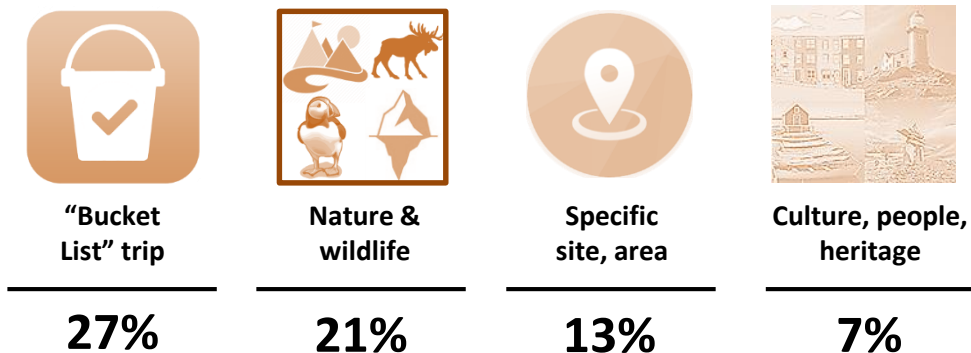
TRIP MOTIVATORS

Vacation visitors are motivated by a strong desire to see our province

While for many visitors a vacation trip to Newfoundland and Labrador is motivated by strong desire to see our province, factors influencing the decision to come here for vacation vary widely. One of the factors that does stand out among others, however, is the curiosity to find out what our destination is like, making it part of many a traveller's bucket list, with 27% of vacation parties reporting that this is indeed so for them: visiting our province has been something they always wanted to do. Nature and wildlife is also a strong motivator as 21% of vacation parties really want to see our natural environment, landscapes, icebergs, whales, puffins and other wildlife. At 13%, the desire to see specific areas or sites in the province rounds out the Top 3 motivators. By far the most mentioned place that vacation visitors want to see is Gros Morne, followed by L'Anse Aux Meadows and St. John's. The Fogo Island Inn as well as Fogo Island itself also feature among the top 5 mentions. Western Newfoundland and the East Coast Trail are also popular in attracting vacation visitors to the province.

Furthermore, our culture, history, heritage and people as well as "being unique" provide motivation for 7% of vacationers to come and visit as this is something that really differentiates us from other destinations. Word of mouth or being recommended by others is also an influencing factor for 7% of vacation parties to choose Newfoundland and Labrador for their vacation. Additional interesting motivators to go on vacation to the province include participating in outdoor activities such as hiking or camping, our TV advertising, previous travel experiences in the province as well as local family ties.

Chart 12: 2016 Non-Resident Vacation Parties – Most Cited Trip Motivators
(% Parties, May to October)



Top sites, areas and attractions motivating vacation trips to Newfoundland and Labrador

Gros Morne National Park	East Coast Trail
L'Anse Aux Meadows	Eastern NL / East Coast
St. John's	National Parks
Fogo Island Inn	Signal Hill
Fogo Island	Cape Spear
Western NL / West Coast	Labrador

ACTIVITIES & EXPERIENCES

Pleasure walking in communities and trail hiking are top outdoor experiences for vacation visitors

Chart 13: 2016 Non-Resident Vacation Parties – Top 5 Outdoor/Recreational Experiences (% Parties; May to October)



Pleasure
walking

89%



Hiking

79%



Visiting National
Parks

59%



Seabird
watching

55%



Whale
watching

52%

With nature and wildlife playing an important role in motivating visitors to vacation in Newfoundland and Labrador, visitors are keen to take advantage of the many outdoor experiences the province has to offer. Participation levels in the various activities are evidence that our vacation visitors are busy explores and see and do as much as they can during their trip. Compared to visitors overall, vacation parties take part in activities to much greater levels (see **Table 14** on the next page), with pleasure walking in/around communities (89%) and trail hiking/walking (79%) topping the list. These are perfect activities that cater to vacation visitors' desire to enjoy the province's scenery, landscapes, coastlines and wildlife. Our National Parks are also very popular, with almost 6 in 10 vacation parties stopping into the four parks. Visitors also marvel at our natural wonders and seeing a puffin, whale or iceberg is a trip highlight for many visitors, with more than half of vacation parties participating in seabird watching (55%) and whale watching (52%). Top outdoor experiences have remained consistent since 2011, however, pleasure walking in/around communities and hiking have become even more popular among vacation visitors.

Vacation parties travelling by auto are much more likely than air parties to visit a National Park (73% vs. 54%) and slightly more likely to engage in wildlife and iceberg viewing. Vacationers visiting by air, on the other hand, are significantly more likely to go seabird watching (60% vs. 40%). Their participation levels in activities such as whale watching, sightseeing boat tours, other bird watching and hiking are also greater than for auto vacation parties.

Table 14: 2016 Non-Resident Vacation Parties – Participation in Outdoor/Recreational Experiences (% Parties; May to October)

	Overall	Vacation	Vacation Air	Vacation Auto
Pleasure walking in/around communities	75%	89%	92%	82%
Hiking/walking on trails	60%	79%	81%	74%
Whale Watching	31%	52%	55%	44%
Visited a National Park (Gros Morne, Terra Nova, Torngat Mountains, Mealy Mountains)	31%	59%	54%	73%
Seabird watching (e.g. puffins, gannets, murre)	30%	55%	60%	40%
Visited other parks, including nature parks and ecological reserves	30%	47%	48%	43%
Wildlife viewing	29%	46%	46%	48%
Iceberg viewing	26%	44%	43%	47%
Sightseeing boat tour	25%	49%	53%	40%
Other bird watching	17%	30%	33%	21%
Geological tour/fossil observation	15%	29%	31%	23%
Botanical garden/plant observation	13%	22%	24%	17%
Ocean fishing	9%	6%	6%	5%
All-terrain/Utility Vehicle (ATV/UTV) Touring	7%	4%	3%	4%
Angling (fresh water)	5%	4%	4%	6%
Canoeing/kayaking/rafting	5%	6%	6%	6%
Golfing	4%	3%	3%	3%
Mountain biking/cycling	3%	3%	2%	5%
Hunting (big game – bear, moose, caribou)	1%	2%	1%	3%
Hunting (small game – hare, grouse)	<1%	<1%	<1%	<1%

Vacation visitors enjoy history, culture and local food experiences

Chart 14: 2016 Non-Resident Vacation Parties – Top 5 Cultural and Heritage Experiences (% Parties; May to October)



**Historic Sites,
museums**

78%



**Exploring small
communities**

76%



**Lighthouse
experiences**

74%



**Culinary
experiences**

70%



**Galleries,
exhibits**

50%

As one of the oldest places that has been settled in North America, Newfoundland and Labrador has plenty of history for visitors to learn about and immerse in at our historic, culture and heritage related sites – and 78% of vacation parties taking in these experiences is proof that these attractions are an essential component of a visitors' journey through our province. For many visitors, experiencing our culture and meeting locals is always a highlight of their trip. With 7 in 10 or more vacation parties doing so, getting to know the places where we live (i.e. exploring our communities – 76%) and tasting our local food (70%) are favourites when it comes to these kinds of experiences, while the 50% of our vacation travellers visiting galleries or exhibits are provided with an immersive experience of the varied aspects of our cultural and heritage. Compared to visitors overall, vacation travel parties showed higher levels of participation in all cultural and heritage experiences.

Culture, heritage and history are experienced to greater levels by air vacation parties than they are by auto vacation parties. Most notably, air vacationers are almost twice as likely to experience a live performance at a local pub than auto parties (52% vs. 28%) while they also experience local food to a greater extent (74% vs. 60%). Air parties also engage more in lighthouse experiences (78% vs. 65%), visit galleries or exhibits (57% vs. 34%) and take in theatre plays or live performances (27% vs. 15%).

Table 15: 2016 Non-Resident Vacation Parties – Participation in Cultural/Heritage Experiences (% Parties; May to October)

	Overall	Vacation	Vacation Air	Vacation Auto
Local cuisine/culinary experiences	58%	70%	74%	60%
Explored small/rural communities	53%	76%	77%	73%
Historic sites/museums/interpretation centres	51%	78%	81%	71%
Experienced nature/history at or around a lighthouse	46%	74%	78%	65%
Went to a local pub for a live performance	36%	45%	52%	28%
Galleries/exhibits	31%	50%	57%	34%
Archeological sites (interpretative tour/hands-on dig)	13%	28%	30%	23%
Theatre plays/other live performances	13%	24%	27%	15%
Participated at a special program at an attraction	9%	15%	18%	9%
Experienced aboriginal culture/traditions/history	9%	17%	17%	15%
Watched/participated in creating arts/crafts	5%	9%	10%	6%

Table 16: 2016 Non-Resident Vacation Parties – Participation in Festivals and Events (% Parties; May to October)

	Overall	Vacation	Vacation Air	Vacation Auto
Participated in a local/community event	15%	15%	15%	14%
Attended a music festival/event	11%	14%	16%	10%
Attended a food/drink-themed festival	5%	6%	7%	4%
Attended/participated in a sports event/tournament	3%	2%	2%	1%
Overall participation in a festival or event	26%	29%	32%	21%

Table 16 shows levels of participation in various types of festivals and events. Vacation travel parties reported similar levels of participation in festivals and events as visitors overall but were slightly more likely to attend a music festival or event (14% vs. 11%).

At 32% of parties, air vacation visitors reported significantly higher overall participation levels than auto vacationers at 21%. When it comes to specific types of events, air vacation parties were more likely than auto parties to attend a music festival or event (16% vs. 10%) or a food and drink themed festival (7% vs. 4%).

Festivals and events most frequently attended by vacation visitors



Canada
Day



George Street
Festival



Twillingate
Dinner Theatre



Anchors Away
Rocky Harbour



Rising Tide
Theatre Trinity

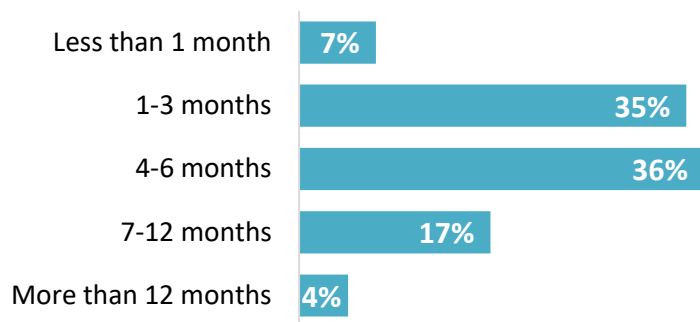


Gros Morne
Theatre Festival

TRIP PLANNING

Vacation visitors plan well ahead using a variety of trip planning resources

Chart 15: 2016 Non-Resident Vacation Parties – Trip Planning Horizon (% Parties; May to October)



Trip planning is an activity that is taken seriously by vacation visitors as evidenced by the time between the start of trip planning and the start of their trip. It takes vacation parties, on average, about 4.8 months to plan their trip to Newfoundland and Labrador, with vacation visitors most frequently taking four months to plan. Thirty-six percent of vacation parties need 4 to 6 months of planning time while another 35% gets their planning accomplished in only 1 to 3 months. Nearly 2 in 10 parties plan their trip 7 to 12 months ahead whereas fewer than 1 in 10 parties plan for less than one month.

Chart 16: 2016 Non-Resident Vacation Parties – Planning Sources Used Before and During Vacation Trip (% Parties; May to October)

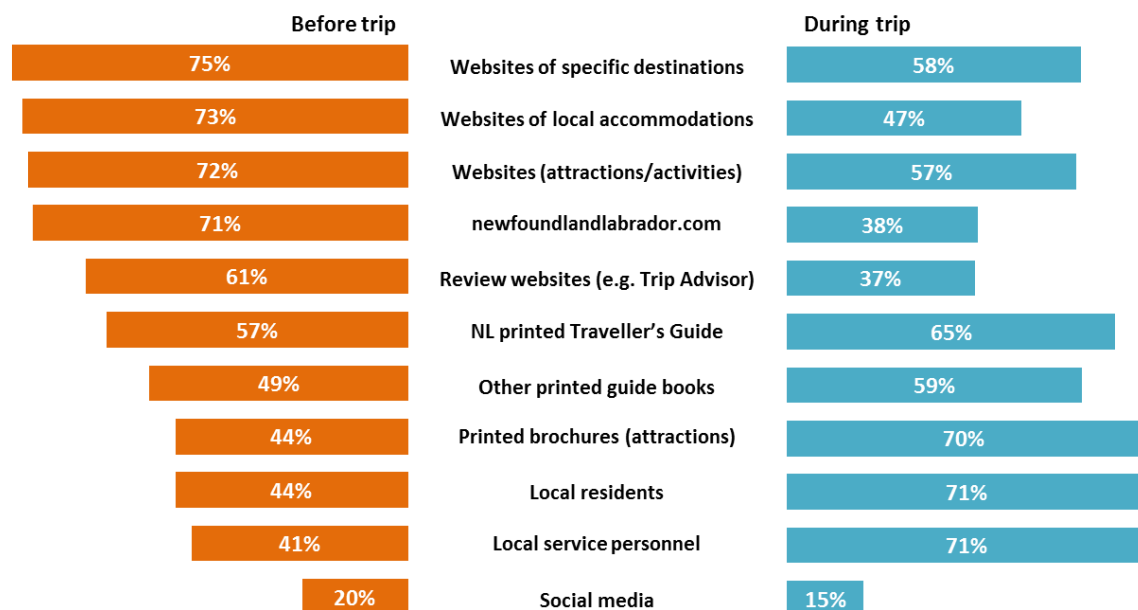
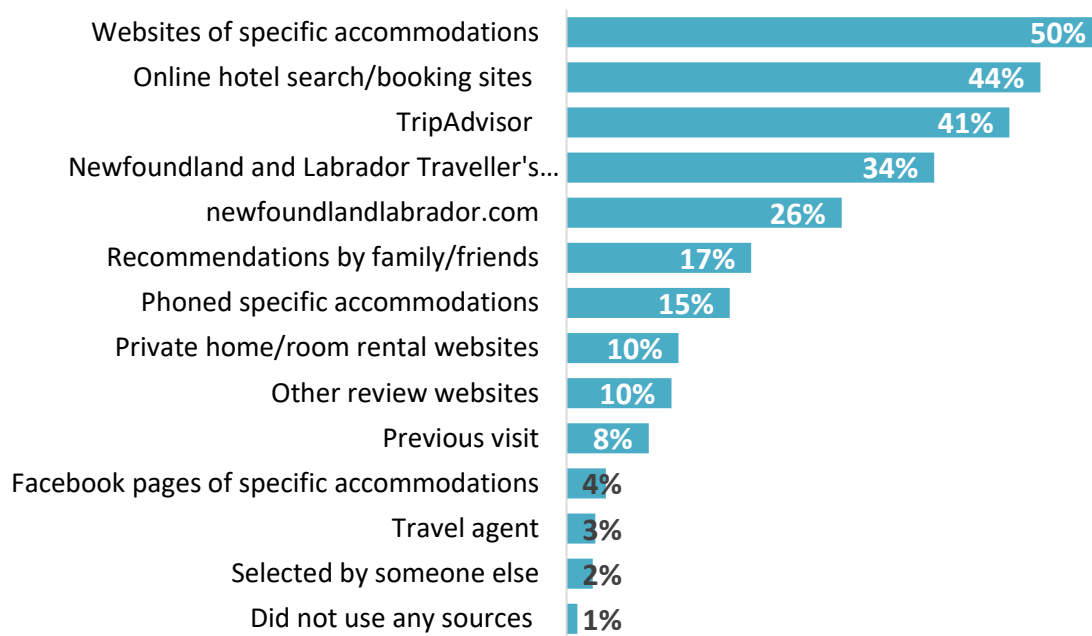


Chart 16 shows the various travel planning sources used by vacation travel parties before and during their trip. When planning prior to their trip, vacationers rely most heavily on web-based sources, with destination websites (75%), local accommodation websites (73%), websites of specific attractions or activities (72%), and newfoundlandlabrador.com (71%) being the most popular trip planning resources.

While travelling in the province, vacation visitors still utilize web-based resources to some extent, however, printed materials such as attraction brochures (70%), the NL Traveller's Guide (65%), and local residents (71%) and service personnel (71%) play an essential role in helping visitors plan their trip while in-destination.

Chart 17: 2016 Non-Resident Vacation Parties – Sources Used to Select Paid Accommodations (% Parties; May to October)



When it comes to accommodations planning, online resources dominate, with half of vacation parties using websites of accommodations when selecting a place to stay. Other online sources such as hotel search or booking sites (44%), TripAdvisor (41%) and the provincial tourism website newfoundlandlabrador.com (26%) are also popular.

One-third of vacation parties (34%) also utilized the Newfoundland and Labrador Traveller's Guide when choosing paid accommodations. Receiving recommendations from family/friends (17%) and phoning specific accommodations (15%) were also relatively common ways for vacationers to select their accommodations in the province. Experience from a previous visit was helpful for 8% of travel parties.

VISITOR INFORMATION CENTRES

The majority of vacation visitor parties used a Visitor Information Centre

With 58% using a Visitor Information Centre (VIC) during their trip, vacation travel parties are almost twice as likely to stop into a VIC and use the various services offered than visitors overall (28%). VIC usage is considerably higher among vacation parties travelling by auto (69%) than among those travelling by air, however, still over half of vacation air parties reported using a VIC (54%).

58% of vacation travel parties use VICs



Vacation Air
54%



Vacation Auto
69%



63%

***First time* vacation visitors are even more likely to use VICs**

Visitor Information Centres mean so much more than information to visitors

Chart 18: 2016 Non-Resident Vacation Parties – Top 5 Visitor Services Used at Visitor Information Centres (% Parties; May to October)



Brochures/
maps

88%



Washroom

76%



Directions to
attractions

67%



Directions to
services

50%



Assistance with
trip planning

39%

Vacation visitor parties who stopped at a VIC during their trip utilized a wide range of services. In line with print material being a premier trip planning source while in the province, nearly 9 in 10 vacation parties obtained brochures and maps at VICs. Over one quarter of vacation parties used washroom facilities (76%) and two thirds received directions to attractions and sites of interest (67%). Half of vacation parties used the VICs to get directions to specific services or facilities while nearly 4 in 10 parties received assistance with trip planning. In terms of other services (see **Table 17** on page 23), 23% of vacation travellers used a VIC to access Wi-Fi with their own devices and a notable 7% booked accommodations with the help of travel counsellors. Furthermore, 5% each used the telephone or accessed a computer located on site.

While all the services delivered by VICs are of relative equal importance to air and auto vacation parties, with the top five services utilized being the same for both types of travellers, vacationers travelling by auto tend to use these services to a greater extent (see **Table 17**). Auto vacation parties were significantly more likely than air travellers to obtain brochures and maps from a VIC, with 91% doing so, while nearly the same share of auto vacation parties stopped at a VIC to utilize washroom facilities (87% vs. 71% of air vacation parties). Furthermore, auto vacationers were almost five times as likely as air parties to book accommodations through a VIC (14% vs. 3%). On-site telephone, Wi-Fi and computer use was also much greater among auto vacation parties.

Table 17: 2016 Non-Resident Vacation Parties – Services Used at Visitor Information Centres (% Parties; May to October)

	Overall	Vacation	Vacation Air	Vacation Auto
Obtained brochures/maps	84%	88%	86%	91%
Used washroom facilities	71%	76%	71%	87%
Received directions to attractions/sites of interest	62%	67%	67%	66%
Received directions to services/facilities	48%	50%	47%	57%
Received assistance with trip planning	35%	39%	39%	40%
Accessed Wi-Fi to use my own device(s)	21%	23%	19%	31%
Booked accommodations	6%	7%	3%	14%
Used the telephone	5%	5%	3%	10%
Accessed a computer located on site	4%	5%	3%	9%



... average number of days by which a small share of vacation parties extended their trip as a result of using VIC services

VICs play a significant role in enhancing the travel experience of vacation visitors to the province. More than seven in ten vacation parties that used a VIC reported learning about an event, activity or area of the province that they didn't know about before. Because of the services received at VICs, 44% indicated that they took part in an activity or event they wouldn't have taken part in and 3 in 10 parties visited a part of the province they wouldn't have visited otherwise. Nearly one quarter of vacationers learnt something during their VIC stop that added to their overall trip experience in Newfoundland and Labrador.

Table 18: 2016 Non-Resident Vacation Parties – As a Result of Visiting a VIC, did you ... (% Parties; May to October)

	Overall	Vacation	Vacation Air	Vacation Auto
... Learn about an event, activity or area of the province you didn't know about before	69%	71%	73%	67%
... Take part in an activity or event that you wouldn't have taken part in otherwise	42%	44%	45%	39%
... Visit a part of the province that you wouldn't have visited otherwise	30%	30%	30%	30%
... Learn about anything else that added to your travel experience	22%	23%	19%	31%
... Extended your stay in the province	2%	2%	1%	4%

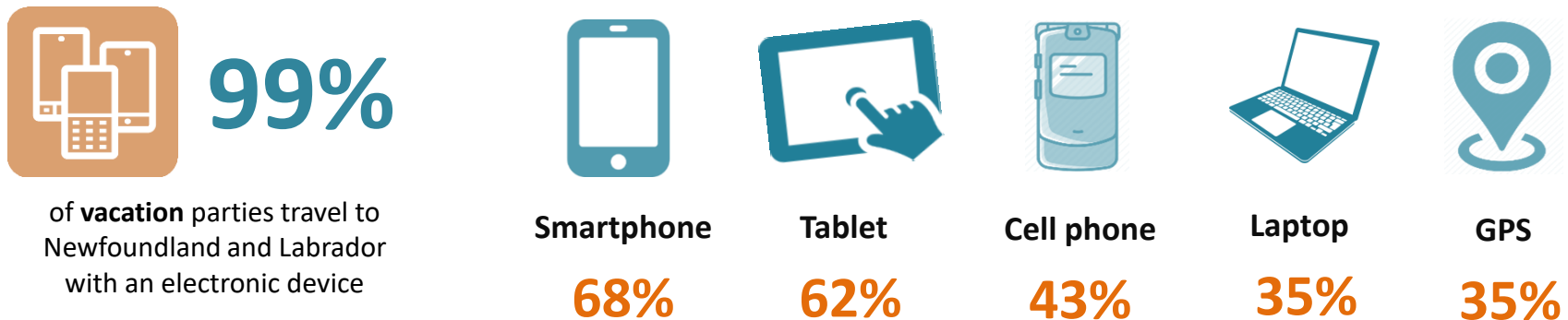
The importance of VIC services can also be seen in the fact that 2% of vacation parties even extended their stay in the province by an average of 2.8 nights. This is more common among auto vacation parties as they are more likely to be able to extend their trips, given the greater degree of flexibility they may have with respect to timing their trip as they may not have finalized their ferry booking and are not tied to a date to return a rental vehicle.

SHARING EXPERIENCES

Vacation visitors love sharing the trip experiences

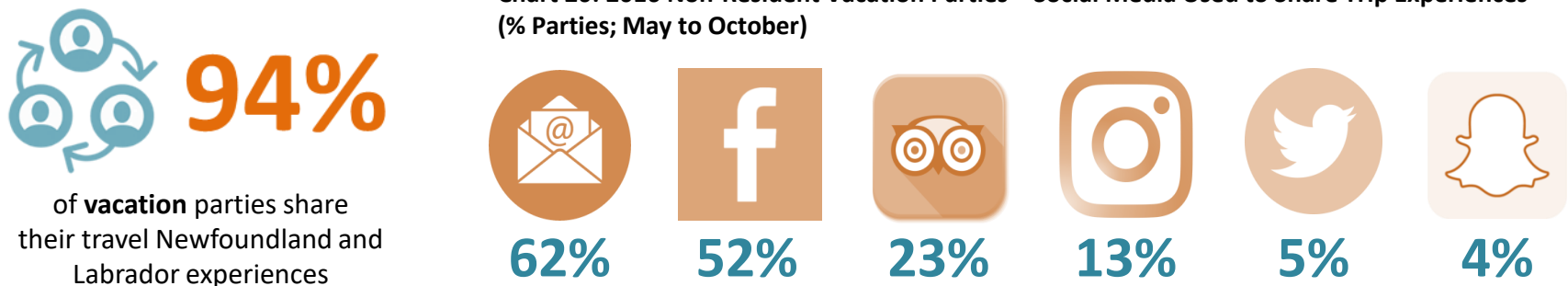
Vacation visitors are staying connected during their trip, with nearly all (99%) reporting that they travel with some type of electronic device. Over two thirds of parties (68%) travel with their smartphone, while tablets (62%) are also very common. Despite the widespread popularity of smartphones, cell phones (43%) are also still very prevalent among vacation parties. At 35% each, laptops and GPSs can be found in many a suitcase as well.

Chart 19: 2016 Non-Resident Vacation Parties – Electronic Devices Taken on Trip to Newfoundland and Labrador (% Parties; May to October)



The vast majority of vacation travel parties (94%) indicated they shared or planned to share their Newfoundland and Labrador travel experiences. Emailing or texting (62%) was the most popular way of sharing travel experiences, while over half of travel parties (52%) are also using Facebook. Vacation visitors use TripAdvisor (23%) and Instagram (13%) to a much smaller extent while Twitter (5%) and Snapchat (4%) are not very likely social media platforms for vacation parties to share their vacation experiences.

Chart 20: 2016 Non-Resident Vacation Parties – Social Media Used to Share Trip Experiences (% Parties; May to October)



TRIP SATISFACTION

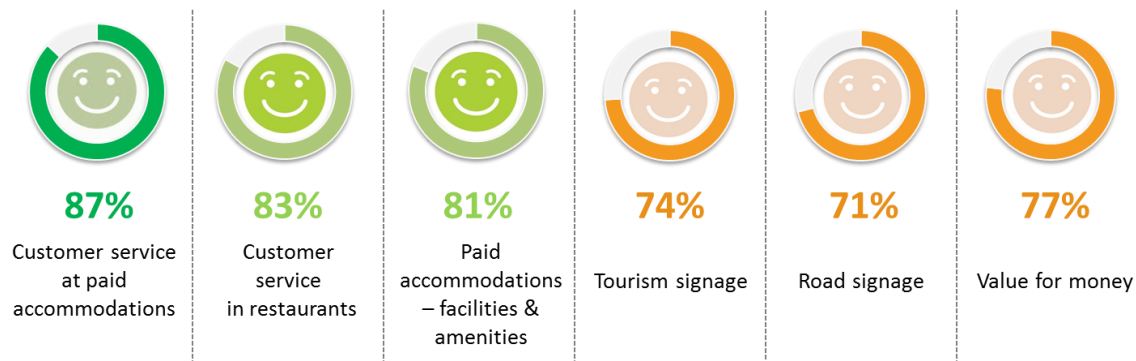
Vacation visitors are highly satisfied with their trip experiences in Newfoundland and Labrador

Chart 21: 2016 Non-Resident Vacation Parties – Trip Satisfaction with Experiences
(% of parties rating 8-10 on a 1-10 point scale; May to October)



Overall, vacation visitors reported high levels of satisfaction with various aspects of their trip in the province. Vacation travel parties are most satisfied with the ability to experience a diverse and inspiring natural landscape (95%) and the great outdoors (92%). High levels of satisfaction are also reported with the ability to take in local history by visiting historic sites, museums and cultural attractions (87%) and the opportunity to meet local people who help create memorable moments (86%). Discovering and enjoying local cuisine in restaurants (78%) and shopping for locally produced crafts and gifts (73%) received slightly lower satisfaction ratings compared to the other experiences.

Chart 22: 2016 Non-Resident Vacation Parties – Trip Satisfaction with Services and Facilities (% of parties rating 8-10 on a 1-10 point scale; May to October)

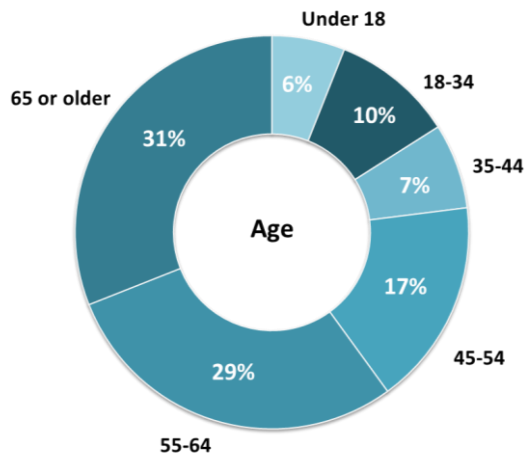


While there is a relatively high level of satisfaction with customer service in restaurants (83%), customer service at paid accommodations is rated considerably higher (87%) than the facilities themselves (81%). Lower levels of satisfaction are noted for tourism signage (74%) and road signage (71%). At 77%, Vacation visitors were noticeably more satisfied with the overall value for money they perceived for their trip compared to visitors overall (70%).

VISITOR DEMOGRAPHICS

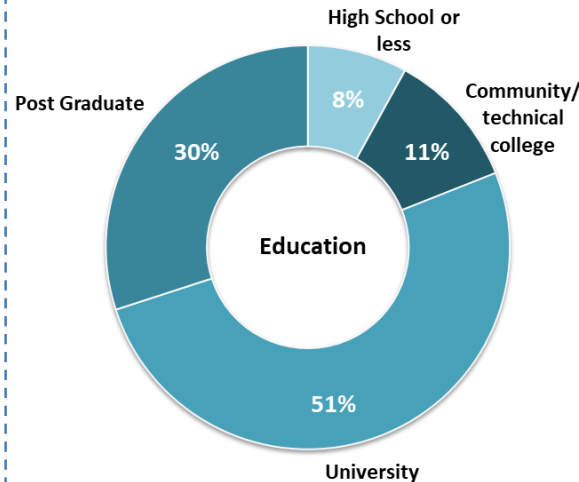
Vacation visitors to Newfoundland and Labrador tend to be older, well-educated and affluent

Chart 23: 2016 Non-Resident Vacation Visitors – Age (% Visitors; May to October)



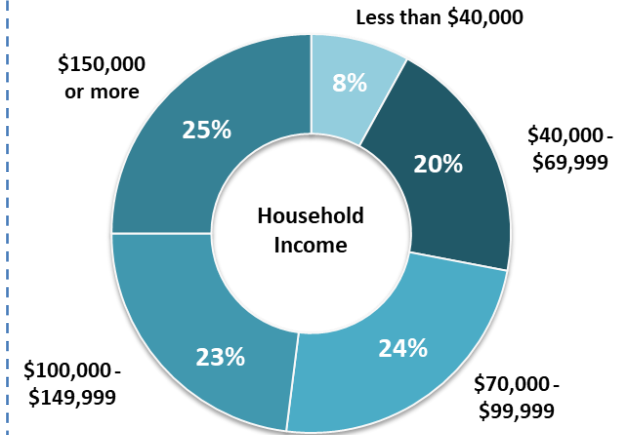
Compared to all visitors, non-resident vacation travellers tend to be older. The majority of vacation visitors is aged 55 or older (60% vs. 48% overall), and nearly one third are 65 years or older (31% vs. 21%). Nearly one in five vacation visitors is aged 45 to 54 while only 7% of vacation travellers are between the ages of 35 and 44. Slightly more visitors – one in ten – are between 18 and 34 years old (the age group that is also known as “Millennials”). This compares to 14% among all visitors.

Chart 24: 2016 Non-Resident Vacation Visitors – Education (% Visitors; May to October)



Vacation visitors to Newfoundland and Labrador are highly educated, with 30% of visitors holding post-graduate degrees and over half having graduated university. Less than 10% of vacation visitors indicated a level of education of high school or less while another 11% finished a community or technical college.

Chart 25: 2016 Non-Resident Vacation Visitors – Household Income (% Parties; May to October)



Similar to the typical visitor to Newfoundland and Labrador, travel parties visiting the province for vacation are affluent, with close to half (48%) reporting household incomes of greater than \$100,000. This group includes a quarter of travel parties with household incomes of more than \$150,000. Nearly one in three vacation travel parties indicated household incomes of less than \$70,000, including 8% with less than \$40,000.